Making it Happen: Stakeholder Engagement

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Can a movie producer win an Academy Award without her cast and crew? Absolutely not! On the same note, you can’t expect to create and deliver prize-worthy training without a team of fully engaged stakeholders. To develop a game plan for building a winning project team, let’s answer some key questions about stakeholder engagement.

What are the benefits of stakeholder involvement?

Stakeholders who are actively involved in your project can provide you with ideas, information and opinions that are vital to your training project. Without them, you’d probably spend many hours hunting and pecking for content—and still not gather everything you need. You may end up with gaps in your content and incorrect information based on assumptions you made because of the lack of stakeholder cooperation. By working successfully with stakeholders, you earn their respect and therefore earn more opportunities to collaborate with them in the future. It’s always nice to have content experts on your side! Of course, stakeholder engagement also means that they understand the importance and benefits of what you do, so they can support you and you can support them. That’s what a team is all about, right?

Who are my stakeholders, and what interest do they have in my project?

Stakeholders are people with an interest in your project and/or people who will be ultimately affected by your training program. Like you, they must invest their time, energy and ideas to make the training as effective as it can be. It’s important to identify your stakeholders before you begin your project, to ensure smooth sailing and avoid expensive delays and excessive revisions as the project progresses. To help you identify them, answer this basic question: Who has an interest in the outcome of my training? Your answer may include top executives, shareholders, middle management, consumers, suppliers, employees, your own team, your boss, subject matter experts, marketing and IT. Also think about what interest they have in your project. It could be financial, organizational, management, educational or something similar. If you identify a team or organization as a stakeholder, be sure to determine an individual within the team to be your primary contact.

To help you identify your stakeholders and their interests, try using these forms offered by TechRepublic.

What roles will the stakeholders play in my project?

Like the actors in the movie producer’s cast, your stakeholders will have specific roles during your training project. In order to get the most cooperation from them, the roles should directly reflect the stakeholder’s interests. For example, the marketing team wants to ensure that your project reflects the company’s branding, so their role in your project should be to provide resources such as branding standards, graphics and video support. If you make the marketing team responsible for verifying your training content for technical accuracy, you can expect that they won’t be fully engaged.
The following table lists several people who might be training stakeholders (depending on the size and nature of your project) and their potential role. Make a table of your own for reference throughout your project.

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business sponsor</td>
<td>Confirm business need by defining business objectives to be met by training, approve/disapprove proposal and budget and propose to company execs, review deliverables as appropriate, communicate project to the organization, supervise change management efforts related to the training</td>
</tr>
<tr>
<td>SMEs</td>
<td>Help analyze learner needs and learning objectives, provide expertise and raw content to help ID design and develop training, review materials and provide feedback to verify content accuracy, participate in interviews and meetings</td>
</tr>
<tr>
<td>Company execs (shareholders)</td>
<td>Authorize funding, set organizational goals and measure the training against them</td>
</tr>
<tr>
<td>Project manager</td>
<td>Communicate regularly with ID to ensure project progress, coordinate project schedule and milestones, monitor and report project dates and deliverables, communicate project successes and challenges, handle changes of scope</td>
</tr>
<tr>
<td>Middle managers and supervisors</td>
<td>Help determine content, provide insight on how they judge an employee's success, help with evaluation and ROI reporting</td>
</tr>
<tr>
<td>Training department managers</td>
<td>Provide personnel and resources for the project, manage the project, review training materials, help align training to corporate needs, supervise implementation, analyze effectiveness and report results</td>
</tr>
<tr>
<td>Marketing and graphics team</td>
<td>Provide branding standards, graphics libraries, video production capability and document templates, assist in promoting training and encouraging participation</td>
</tr>
<tr>
<td>Finance/billing</td>
<td>Approve training budget and allocate funds, financial reporting, look for budget compliance or overage, evaluate ROI results</td>
</tr>
<tr>
<td>IT department</td>
<td>Provide appropriate mechanisms for content delivery and reporting</td>
</tr>
<tr>
<td>Instructional designers (ID)</td>
<td>Perform analysis to define desired training results, design and develop training materials, interview SMEs and business sponsor, communicate project progress to project manager, manage the review process, help implement the training solution</td>
</tr>
<tr>
<td>Instructors</td>
<td>Offer insights to learner behaviors and delivery modes, help evaluate effectiveness of program</td>
</tr>
<tr>
<td>Training department team</td>
<td>Help design and develop training; provide insight on best practices, standards and delivery methods; review training materials; help implement training</td>
</tr>
<tr>
<td>Trainees</td>
<td>Help determine learner needs, skill gaps, suitability of training materials, effectiveness of training</td>
</tr>
<tr>
<td>High performers</td>
<td>Verify learner needs, content validity and delivery methods; assist in TTT and implementation; provide insight during evaluation</td>
</tr>
</tbody>
</table>
What else should I consider about my stakeholders as I build my team?

After you identify stakeholders and their potential roles, answer the following questions to determine how you will interact with them. You can answer some of these questions on your own, but be sure to ask each stakeholder these questions, too:

- **What information do you want from each stakeholder? What do they want from you?** It may be easy to determine what you want from them, but don’t forget the other side of the fence. If the business sponsor wants regular reporting on project status, be sure you provide this. If the SMEs want sufficient advance notice on work coming their way, make sure you do it. By meeting their needs, you’ll be more likely to get what you need when you need it.

- **How much support do you need from each stakeholder? What will help them support your project?** When you develop your list of stakeholders and their roles, you’ll see that some stakeholders play large support roles and some do not. To get the support you need, you’ll also need to support the stakeholders. Put yourself in their shoes and try to anticipate what they will need before the project begins. Why? You want to be ready to meet their needs and build their confidence in you as early as possible. Then, as you meet with each stakeholder, ask this question to validate your thoughts and begin to build your rapport with them.

- **What inspires each stakeholder?** By focusing on their motivations and using them to refine the stakeholders’ roles on the project, you will be able to increase their engagement and win them over early in the project.

- **How much influence does each stakeholder have in ensuring the success of your project?** Some of your stakeholders will hold the power to approve/disapprove of your project and to advance/delay it. You need to keep these team members satisfied with effective communications and involvement throughout the project.

- **How much interest does each stakeholder have in your project?** Interest typically indicates the willingness to participate, so these team members will be more likely to dedicate the time to ensure your project’s success. They will be your best resources for information and help. Be sure to get them involved early to maximize their engagement.

- **What do the stakeholders think of you/your team/your training?** Sometimes your stakeholders are people you’ve worked with in the past, and you have a healthy, established relationship with them. However, sometimes you’ll need to learn more about stakeholders to determine how they feel about training and your team. It’s good to find this out before the project begins so you’re prepared to educate them on your importance to the project’s success and motivate them to contribute.

- **How will you manage their resistance?** Stakeholders have their own thoughts and ideas, but they might go against the consensus of the team. Before you start facing this type of challenge, have a plan for handling it. You might have a formal process such as submitting concerns in writing to the project manager. Or you might maintain an “open door policy” where stakeholders can voice their concerns to you directly.

How do I get everyone on board and keep them that way?

In the days or weeks before your project begins, it’s a good idea to introduce yourself to the high-influence and high-interest stakeholders and ask them some of the questions mentioned previously. Because these are the team members you’ll be working with the most, you can get their buy-in early by showing your interest in keeping them satisfied. You should also ask them their preferred method of communication and the type and frequency of communication they’d like to receive. Be sure to build this information into your project plan so you can be sure to meet their needs with the appropriate amount of communication.
To get all your stakeholders on board, it’s highly advisable to hold a project kickoff meeting. This meeting is a critical first step in launching the project, and all stakeholders should attend. If you can’t find a 1-2 hour timeslot that meets everyone’s needs, hold the meeting with as many stakeholders as you can and follow up with the absent stakeholders within a week after the kickoff. During the meeting, introduce yourself, each other and the project. Also, be sure to clearly define the following:

- **Your understanding of the project scope**: This helps manage expectations, allow you to hear others’ thoughts and enables you to gain a consensus on a common purpose. It also helps build trust within the team—a fundamental factor for success.
- **Roles and responsibilities**: Let everyone know exactly what you expect from them. Include the estimated time investment for different tasks, to set their expectations. It’s essential for the stakeholders to understand where they fit into the process and how they will be contributing to the project’s success.
- **Project schedule**: Review the schedule with everyone and ensure that key stakeholders will be able meet the projected milestones and delivery dates. Let them know that their participation and prompt review will help ensure that the project stays on track.
- **Business objectives and learning objectives**: Review the objectives and ensure that everyone understands the end vision for your project. Then gain agreement from everyone and get their buy-in to move forward with this vision in mind.

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- **Welcome and Introductions**
- **Project Overview**
  - Goals
  - Scope of work
- **Team Roles and Responsibilities**
  - Training & Development
  - Stakeholders
- **Guidelines for Review and Signoff**
  - Review process
  - Review guidelines
- **Project Schedule**
  - Key deliverables and dates
  - Project milestones
  - Projected rollout activities and dates
- **Review Action Items**
- **Meeting Wrap-up**
• Measure of success: How will the stakeholder team know if the training is a success? Let them know how you plan to measure success and their part in the process. This helps pave a clear path to project completion.
• Your development process and key deliverables: This is a chance to educate your stakeholders on effective instructional design practices. Tell them about the importance of each step in your process and where they'll contribute.
• Communication strategy: Let the stakeholders know how you intend to communicate with them during the project, and set their expectations on what communication you need from them. You can also discuss external communications—how the business will learn about the project and prepare for its arrival.
• Contacts: Make sure you provide everyone with email and phone contact information for the development team, project manager and business sponsor.

Note: You may choose to include all this information in a project workbook, so members of the stakeholder team can refer to it in the future.

At the kickoff meeting, you have a wonderful opportunity to define what success will look like and the exact path the team will follow to get there. To emphasize your confidence in them and the project, humbly inform the stakeholders that you’ll be looking for testimonials and references since you expect this project to be successful and career enhancing for everyone involved.

As your project progresses, your involvement with the stakeholders will vary depending on their responsibilities. Your stakeholders who are heavily involved in the project deserve your greatest attention. Keep them fully engaged with regular status reports and notice of upcoming deadlines. Other stakeholders with less interest or involvement require your attention, too, so you can check in with them periodically to ensure no issues are arising and provide them with updates at key milestones in the project.

Cooperation and communication are two critical elements in keeping your stakeholders engaged. The American Management Association offers some tips in Building Better Projects Through Improved Cooperation.

How do I handle stakeholder issues during the project?

Even the smoothest paths have bumps along the way, but if you plan for them, the bumps will seem much smaller. For example, if your stakeholders have differing opinions, give them an opportunity to air their thoughts in a neutral environment. Then work through them together until you can either reach a consensus or agree to disagree and move forward. If some partnerships in the stakeholder team just aren’t working despite your most valiant efforts, get the business sponsors involved. Let them know the consequences of the issue and ask for assistance. Then let the stakeholder know that you are contacting the business sponsor and that the project and end product need their support to be successful.

A familiar issue in training projects is the lack of SME involvement. To help SMEs meet your review deadlines, let them know a few days ahead of time when something is coming their way. That advance notice will help them plan review time into their schedules. When you deliver materials, highlight the areas...
where the stakeholder should look first; this helps them prioritize their limited time. Then touch base with the SMEs if you don’t receive their feedback when promised. If you are ever required to make content available without having received SME feedback, clearly communicate that the content has not been properly reviewed. This manages everyone’s expectations and meets your promised deadlines, while at the same time drawing attention to the need for proper review.

**How should I end my project?**

When your training has gone live and your stakeholder involvement comes to an end, invite them to a final wrap-up celebration/meeting. It’s an opportunity to get everyone together one last time to discuss the project, and it gives you a chance to thank everyone for their involvement. During the meeting, discuss what went well, what could go better next time and any evaluation results you gathered during the program. Summarize the meeting with a lessons learned or end-of-project report, and distribute it to all stakeholders for review and approval. Be sure to communicate your dedication to implementing their feedback.

After the training is finished and you gather ROI metrics, be sure to communicate these results to the stakeholders. At this time, you can also ask for their testimonials. And don’t be shy about sharing your success. Market it to the organization as an incentive to participate in company training, or use it in a “best practices” case study or white paper.

Developing and supporting a winning project team takes careful planning, continuous dedication and appropriate communication. You may not walk away with a gold statue in your hand, but you will be rewarded for your efforts with the commitment, respect and support of many significant people in your organization.

Do you have any thoughts to share? [Let us know](#) what you’ve learned from your experiences with stakeholder engagement. We’d love to hear from you, and we’d love to include your comments in our published series of this article!

Michaels & Associates offers expertise in project and stakeholder management for all your training projects. If you’d like more ideas or assistance with your projects, [contact us](#) today!

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