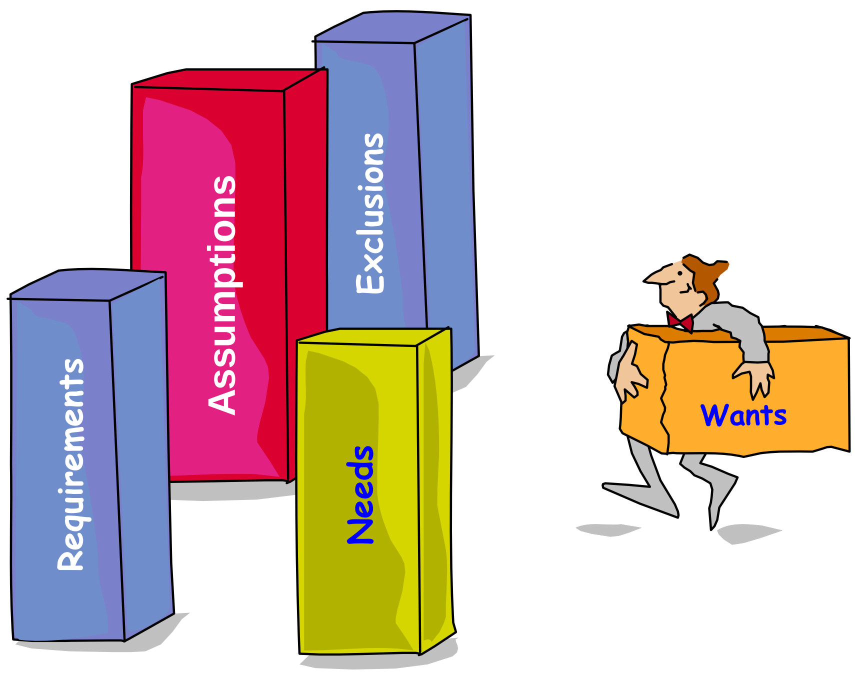
# Stakeholders and Requirements

## Module 3



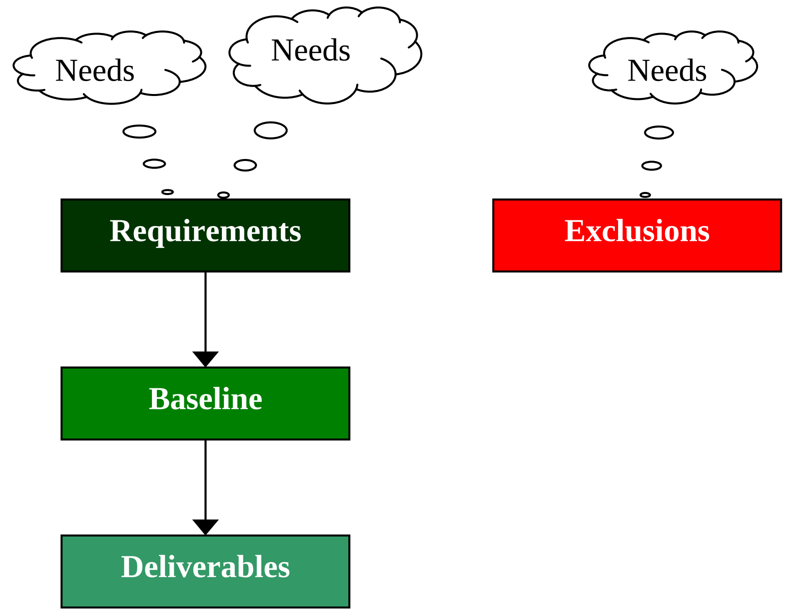
# Discussion

## Stakeholders

Who?

What do they need?

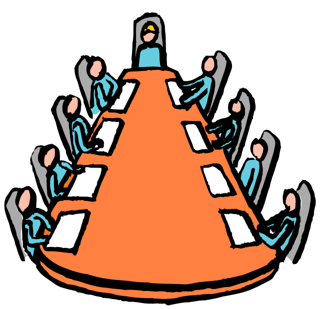
What do we need from them?



# Who are stakeholders?

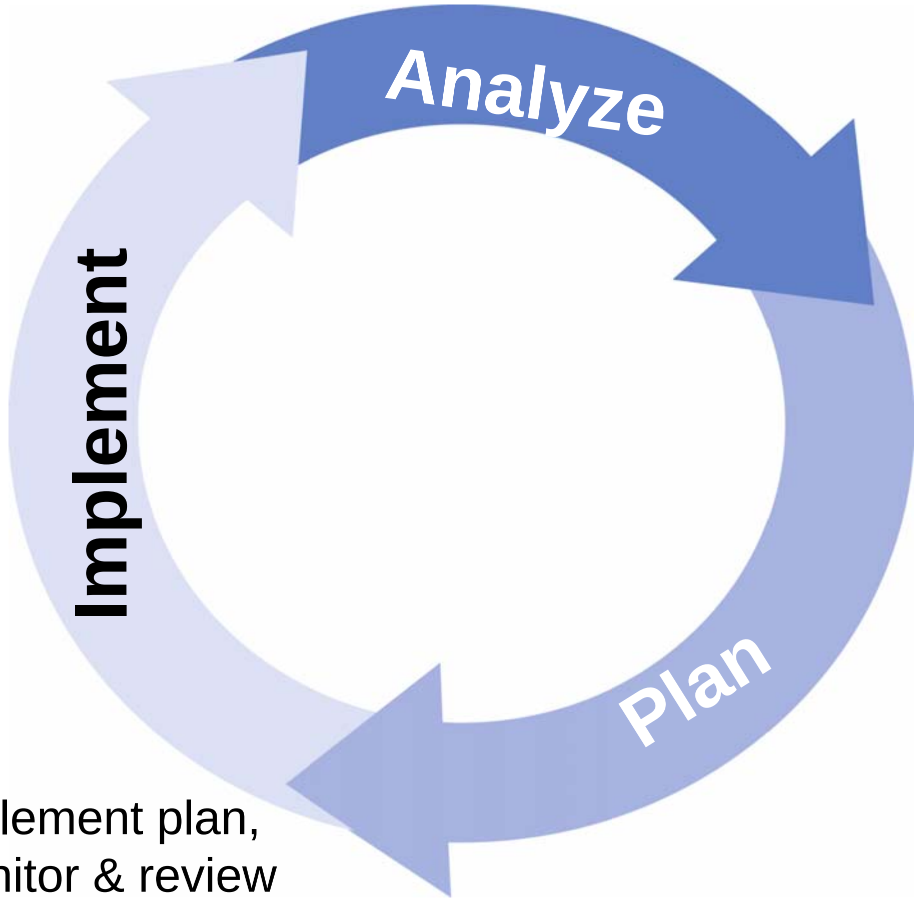
Any group or individual who is impacted by or who could impact the project, such as…

- IBM management
- Your team members
- Other IBM teams at the client site (e.g., other business lines)
- Client sponsor
- Client project manager
- Client team members



- Trade unions
- Employee associations
- Software vendors
- Regulatory bodies
- Media
- Industry influencers
- The client's customers

# Stakeholder Management Process




Implement plan, monitor & review

Initial Assessment

- Who are the stakeholders?
- What is their level of influence on the project?
- What is their level of support for the project?

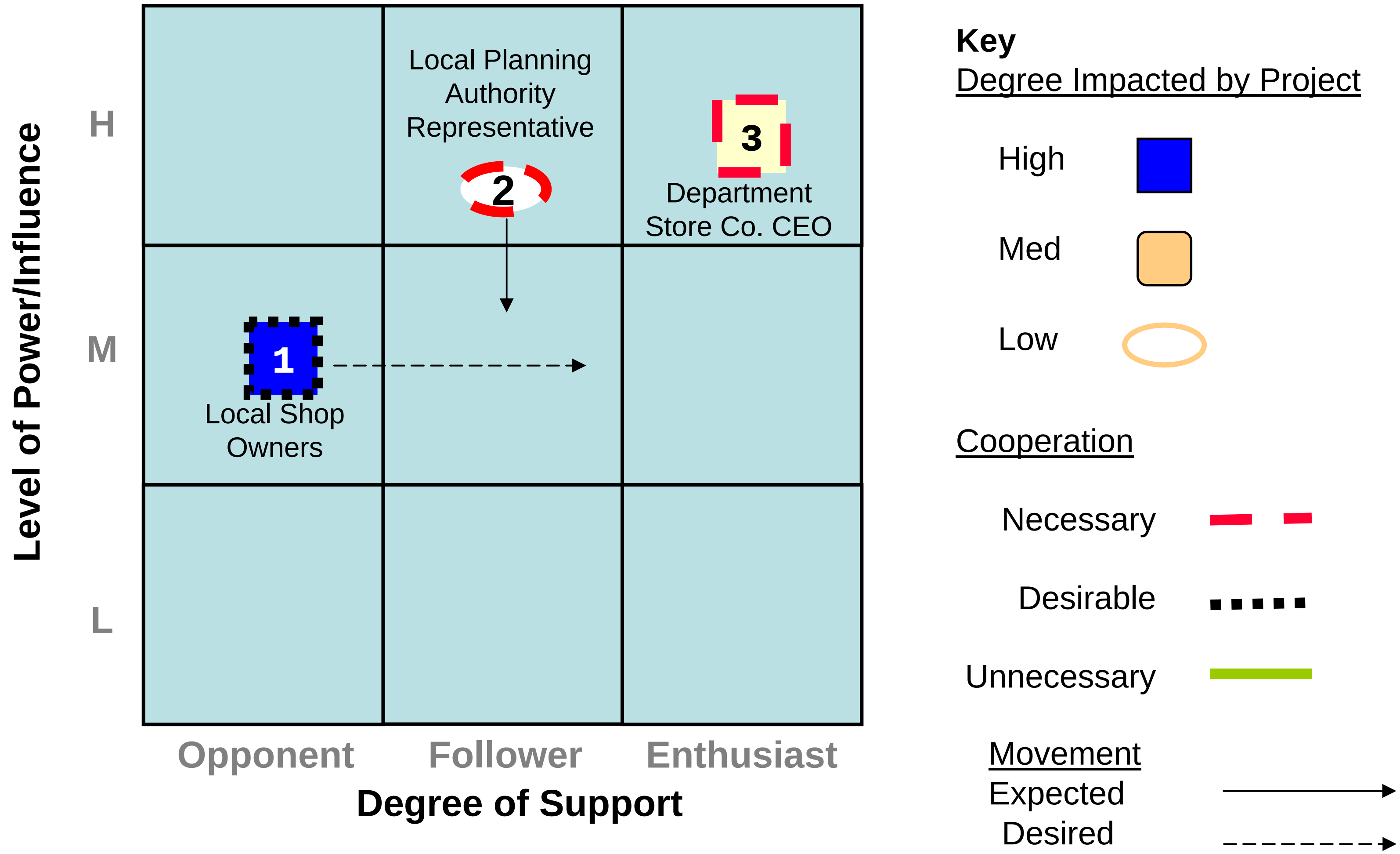
Movement Plan

- How do the stakeholders need to be moved, if at all?
- What will motivate them to move? (What's in it for them?)

Need to ask them questions to accomplish the process !

# Stakeholder Mapping

Example: Project to build a new Department Store



# Question Types

Use:

- Open questions
- Closed questions
- Probing questions

Avoid:

- Leading questions
- Critical leading questions
- Marathon questions
- Multiple questions
- Ambiguous questions

# Stakeholder Mapping Exercise

**Purpose:**

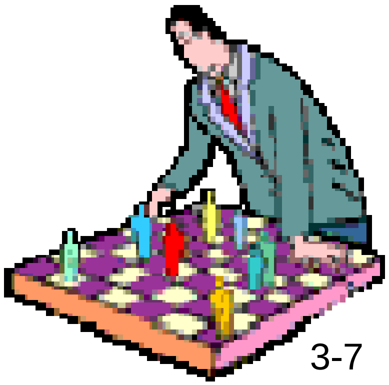
- Practice creating a stakeholder map & movement plans
- Practice applying stakeholder management techniques to move stakeholders according to the movement plan
- Practice gathering customer needs through the practical application of interviewing tools and techniques

**Process:**

1. Meet a stakeholder (Analyze), ask questions to place on the grid
2. Once placed, decide if they need to be moved on the grid
3. Find out about their requirements & motivations. Begin to develop your Requirements Baseline & Movement (Plan).
4. Based on your interactions with each, work out how they can be motivated to be moved or maintain any favorable grid positions (Plan)
5. Finalize and Implement your Movement Plan
6. Repeat – you will meet between 2-3 different stakeholders

**Participation:** 2 volunteers to play the stakeholder characters
Rest of class act as one group.

**Product:** Stakeholder map, movement plan
Stakeholders' key requirements & exclusions



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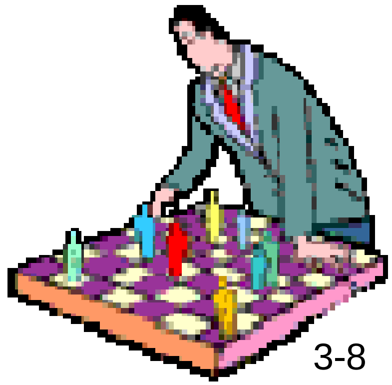
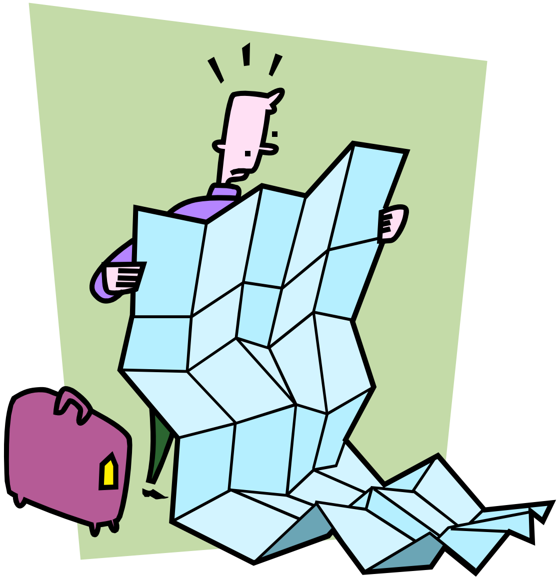


# Stakeholder Considerations

- Not all stakeholders need to be moved
- They can move back as well as forwards
- They are subjective – the more data, the more accurate the assessment
- It's never too early to start
- Stakeholder documents are living things
- Stakeholder documents are sensitive – treat with care!
- Communication planning is done based on stakeholder assessments and plans



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# Stakeholders are Committed


**Healthy Signs**

- Executive incentives linked to project results
- Investments in change management and training
- Stakeholder resources dedicated as planned
- Stakeholders engaged as planned

**Unhealthy Signs**

- Executive sponsor not visible
- Lackluster Stakeholder interest
- People sabotaging efforts
- Resistance to new ideas
- Experts not available

**1. Stakeholder management plan is fully implemented and maintained.**

**2. The right sponsor is appropriately engaged and funded.**

**3. Regular Steering Committee meetings are being held, decisions and actions are being taken in a timely fashion and are effective.**

**4. All appropriate stakeholder groups are effectively represented and engaged.**

# Create the Requirements Baseline

**Purpose:**

- Practice creating a Requirements baseline using data gathered through stakeholder interaction and reading Project Documentation
- Practice categorizing the needs into requirements & exclusions.

**Process:** See the diagram.


**Participation:** Table Teams

Remember to assign a Project Manager

**Product:** Use a flip chart to generate a:

List of Requirements,list of exclusions,

list of assumptions

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# Business Benefits are Being Realized


**Healthy Signs**

- A compelling reason to implement
- The solution doesn't have to be fancy
- Before and after difference can be measured

**Unhealthy Signs**

- "Why are we doing this?"
- Time is not important
- Cost is too important

**1. The business case is clearly and convincingly articulated.**

**2. The solution will appropriately support the desired outcomes and costs.**

**3. The quality of work products is appropriate.**

**4. Benefits tracking is ongoing and meaningful.**

# Tips on Business Benefits

- "Benefits" depend on the perspective of the individual/group undertaking the analysis, so...
- What may appear to be a benefit for one business area may be a drawback for another
- Make sure benefits are agreed up front by the relevant stakeholders
- Do not commit to benefits that are beyond our control (e.g., those that may take a long time to be fully realized, that depend on many external factors)

# Seven Keys Assessment

**Purpose:** Practice reviewing the health of the project using the Seven Keys

**Process:** See the diagram.
- Record status
- Think about issues & actions

**Participation:** Teams led by Project Manager

**Product:** Status, issues, and actions for Stakeholders, Business Benefits, and Team

Time allowed 5 Minutes

**Seven Keys Assessment Worksheet**

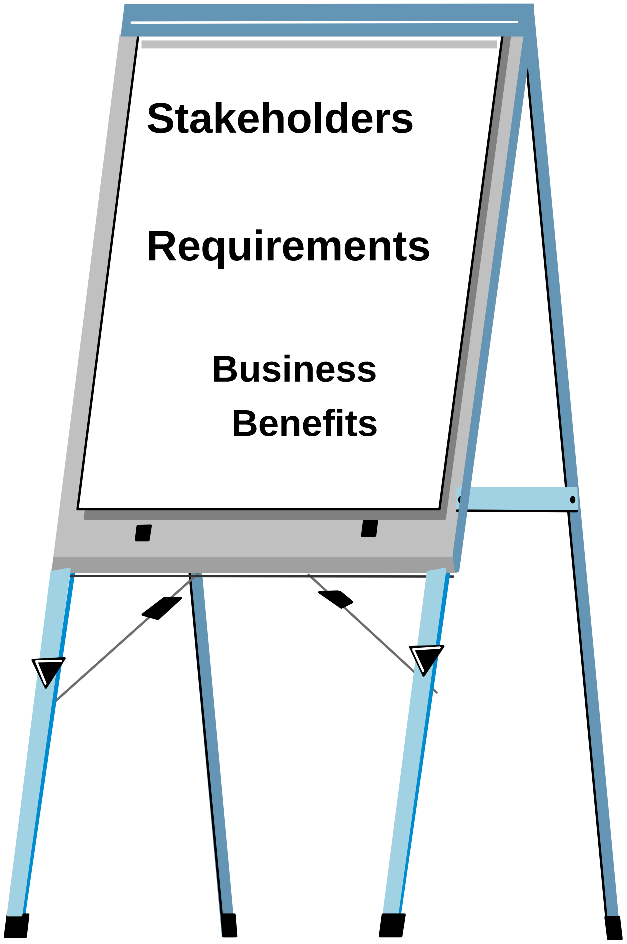
- Red - Urgent - Corrective action required immediately.
- Yellow - Warning - corrective action required in the near term.
- Green - Stay the Course - no corrective action required.

Project Name: Interviewee: Date: Interviewer:

| Key and Criteria | Noted Issues | Heads Up Display | Proposed Actions |
|---|---|---|---|
| Stakeholders are Committed | ➢ | Red Yellow Green | ➢ |
| Business Benefits are Being Realized | ➢ | Red Yellow Green | ➢ |
| Work and Schedule are Predictable | ➢ | Red Yellow Green | ➢ |
| Scope is Realistic and Managed | ➢ | Red Yellow Green | ➢ |
| Team is High Performing | ➢ | Red Yellow Green | ➢ |
| Risks are Being Mitigated | ➢ | Red Yellow Green | ➢ |
| Delivery Organization Benefits are Being Realized | ➢ | Red Yellow Green | ➢ |

# Debrief

- What happened?
- What did you learn?
- What can you apply in your job / project?



# Feedback Reminder

## Receiving Feedback

- Breathe
- Listen and do not interrupt
- Ask for clarification
- Paraphrase, summarize
- Acknowledge valid points
- Sort out what you heard

## Giving Feedback

- Give both the positive and "even better if"
- Catch people doing something right
- Be descriptive, use examples
- Speak for yourself, not others
- Stay with known things, not hearsay
- Be sensitive - understand your audience

# PM Feedback

After the case study exercise:

- The PM describes what went well
- The team describes what went well
- The PM describes what could have been better
- The team describes what could have been better
- Hand the feedback forms to the PM

- After providing the PM feedback.   Document your  lessons learned on page 26 of the Learning Log.
  - This should include any changes that you plan to make in your daily work as a result of this exercise.