Study Guide: Stakeholder Analysis

Stakeholder Analysis Tools

1. Stakeholder Triage

Stakeholder triage is the first stage of your analysis. A triage is a sorting process. You use a small number of essential characteristics, to sort a set of stakeholders into a few meaningful categories.
The most commonly used characteristics are:

- *Interest* (in your project)
- *Power* (to affect your project)

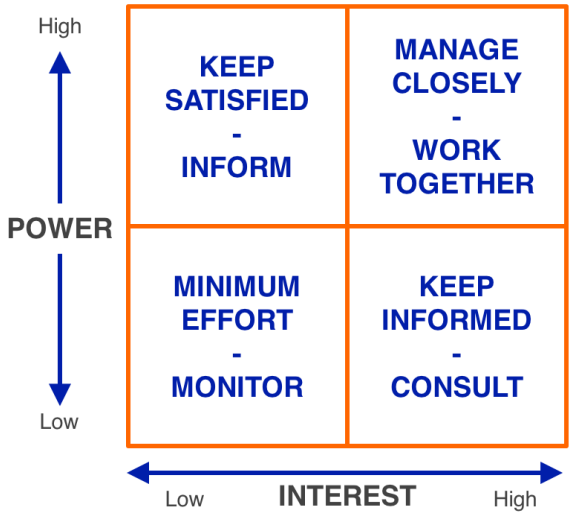
However, I recommend two different characteristics:

- *Attitude* (to your project)
  This can be supportive or antagonistic… or possibly neutral

- *Potential Impact* (upon your project)
  This can arise from formal power, or informal influence
- Remember, if your stakeholders will see this report or analysis, describe their attitude as being supportive or as having legitimate concerns

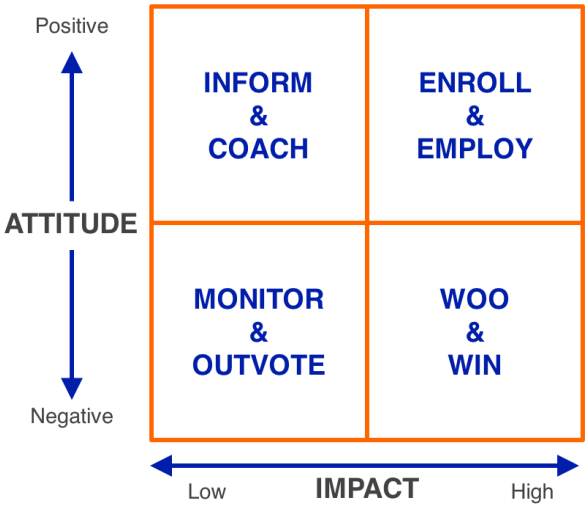
Both approaches create four categories. For each category, you have a standard strategy.
It is best to illustrate these, with the diagrams below.

The 'Standard' Stakeholder Map



The 'Standard' Stakeholder Map
Reproduced from The Influence Agenda
by Dr Mike Clayton (Palgrave Macmillan)

The Stakeholder Triage



Stakeholder Triage
Reproduced from The Influence Agenda by Dr Mike Clayton (Palgrave Macmillan)

Each of the four boxes in the stakeholder triage graphic, have a stakeholder strategy.

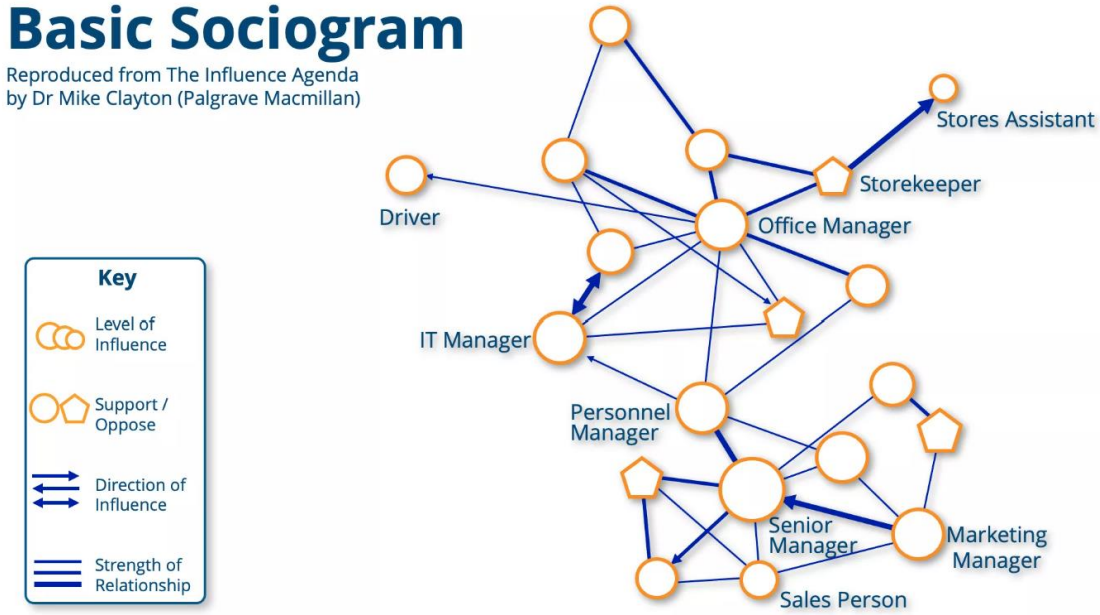
- **Enroll and Employ:** In this top right box, stakeholders are already supportive and their impact is high. Here the strategy is to engage the stakeholder in what we want to achieve and have them advocate for us.
- **Woo&Win:** The stakeholders in this box also have a high impact but have some reservations. These stakeholders are very important for our project, and we need to win them over to our side. We need to do everything that is lawful and ethical to persuade them to support us.

- **Inform and Coach:** In this section, we do have supporters for the project but they do not have much impact be it because of their role, level of involvement or level of influence. At this level, we can inform these stakeholders about what we are doing and how they can be more helpful.

- **Monitor and Outvote:** These are the stakeholders who aren't so keen on what we are doing but they also do not have a lot of impact. Although, it is very tempting to ignore this group, continue to pay attention. Everyone can have an impact and you can run the risk of misreading the situation. Paying attention

ensures you can safely determine whether you can outvote them and neutralize their impact.

2. **The Sociogram**



Basic Sociogram, reproduced from The Influence Agenda by Dr. Mike Clayton.

Sociogram

A sociogram is a visual representation or diagram that illustrates the social relationships and interactions among individuals within a group. It typically uses symbols or nodes to represent individuals and lines or arrows to depict the relationships or interactions between them. Sociograms are commonly used in sociology, psychology, and education to analyze social networks, group dynamics, friendship patterns, and communication structures. They can provide insights into the social structure of a group, including who interacts with whom, the strength of relationships, and the overall cohesion or division within the group. Sociograms are often created through surveys, interviews, or observations to gather data on social relationships and then visually represented for analysis and interpretation.

Building a sociogram typically involves several steps:

- **Define the Purpose:** Determine why you're creating the sociogram and what specific aspects of social relationships or group dynamics you want to analyze.

This could be understanding friendship patterns, communication networks, leadership structures, or any other relevant aspect of social interaction within the group.

- **Identify Participants:** Determine who will be included in the sociogram. This could be individuals within a classroom, a workplace, a community, or any other social group.

Circles to represent female members

Triangles to represent male members

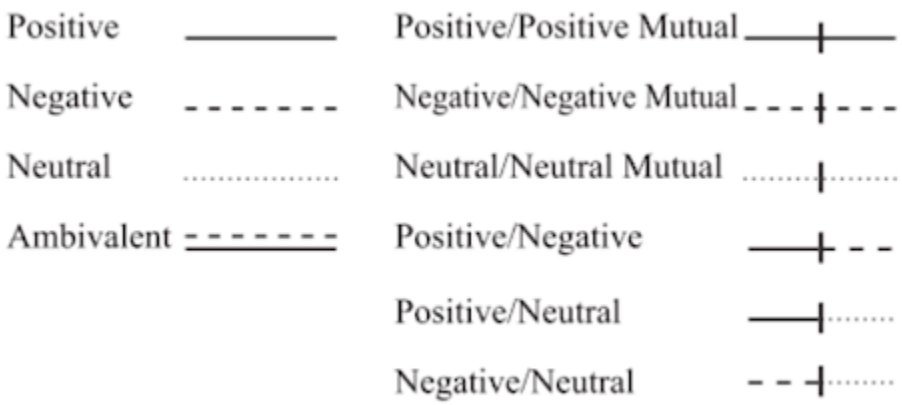
Concentric circles or triangles to represent female and male members from a different group

When selecting a template, consider the shapes of the vertices to ensure you pick one whose nodes reflect your group's entities.

- **Collect Data:** Gather data on the relationships and interactions between the participants. This can be done through various methods such as surveys, interviews, observations, or social network analysis. You may ask questions about who interacts with whom, the frequency and nature of interactions, and the perceived strength of relationships.

- **Choose Representation:** Decide how you will represent individuals and their relationships in the sociogram. Common representations include using nodes (circles or squares) to represent individuals and lines or arrows to indicate relationships or interactions between them. You may also use different colors,

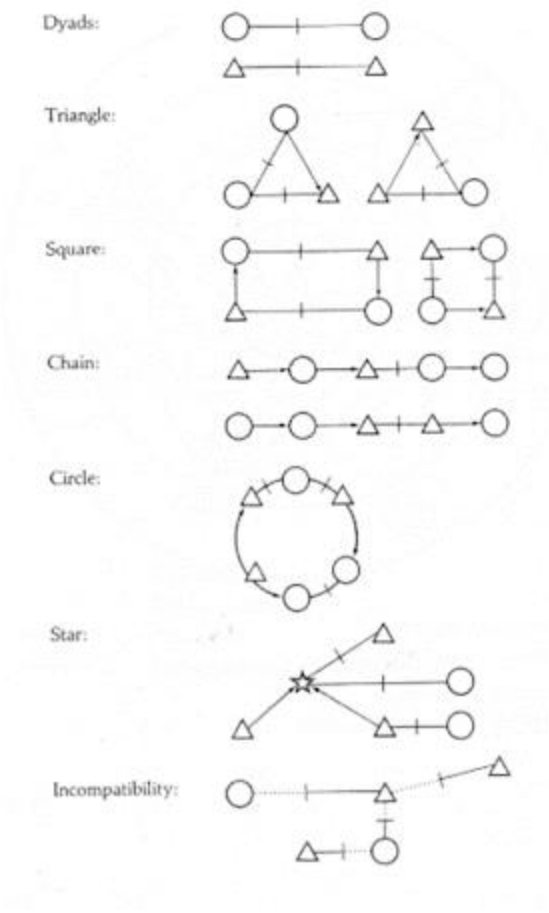
shapes, or labels to denote different types of relationships or roles within the group.



- **Create the Diagram:** Use the collected data and chosen representation to create the sociogram. This can be done manually using paper and pen or digitally using software such as graphing tools or network analysis software. Arrange the nodes and lines in a way that accurately reflects the relationships and interactions observed in the data.

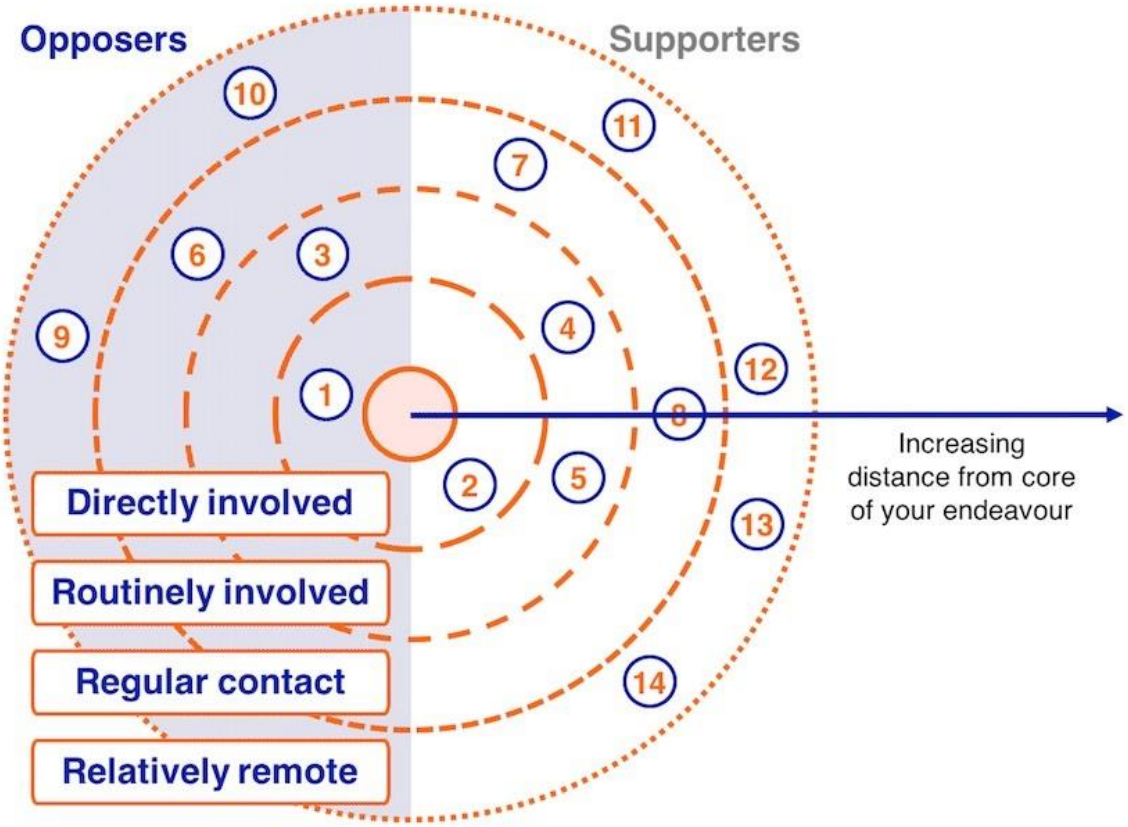
- **Analyze and Interpret:** Once the sociogram is created, analyze the patterns and structures it reveals. Look for clusters of individuals who are more interconnected, identify central figures or leaders within the group, and observe any patterns or anomalies that may emerge. Consider how the sociogram reflects the social dynamics and relationships within the group and what insights it provides about group cohesion, communication, and organization.

Since sociometry and sociograms reveal social networks, patterns are essential components of the diagrams. The most common patterns you are likely to encounter on a blank sociogram template include:



- **Iterate and Refine:** Depending on the insights gained and the initial purpose of the sociogram, you may need to iterate on the process by collecting additional data, refining the representation, or conducting further analysis to gain a deeper understanding of the social dynamics within the group.

3. The Proximity Chart



Proximity Chart

Reproduced from The Influence Agenda by Dr Mike Clayton (Palgrave Macmillan)

A proximity chart, also known as a proximity matrix, is a type of graphical representation used to display the relationships or similarities between a set of objects or entities. Unlike a sociogram, which typically focuses on social interactions among individuals within a group, a proximity chart can be used in various contexts beyond social networks, such as data analysis, clustering, and multidimensional scaling.

In a proximity chart:

1. **Objects or Entities:** Each row and column of the chart represents an object or entity being compared. These could be individuals, items, variables, or any other entities of interest.

2. **Proximity Values:** The cells of the chart contain numerical values representing the degree of similarity, dissimilarity, or relationship between the corresponding pairs

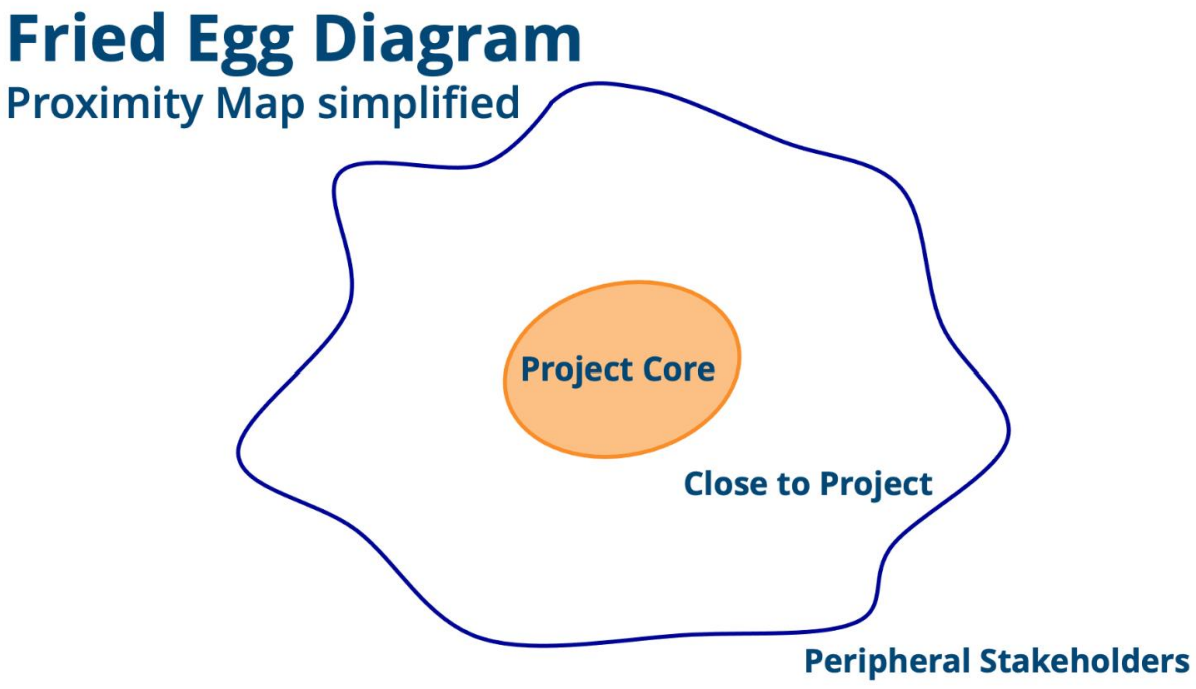
of objects. These values are often based on some measure of distance or similarity, such as Euclidean distance, correlation coefficient, or cosine similarity.

3. **Symmetry:** Proximity charts are typically symmetric, meaning that the proximity value between object A and object B is the same as the proximity value between object B and object A.

4. **Color or Intensity:** Proximity charts may use colors or intensity gradients to visually represent the magnitude of proximity values. Higher values may be represented with darker colors or stronger intensities, while lower values may be represented with lighter colors or weaker intensities.

Proximity charts are commonly used in various fields such as statistics, data analysis, pattern recognition, and clustering algorithms. They provide a compact and informative way to visualize the pairwise relationships between objects or entities, which can help identify patterns, clusters, or similarities in the data.

4. The Fried Egg Diagram



Fried Egg Diagram, reproduced from The Influence Agenda by Dr. Mike Clayton.

The Fried Egg Diagram is a metaphor to represent a central yoke of core stakeholders and an outer white of lesser stakeholders. Outside of the egg we have people that are stakeholders of the project but are very remote from the project, therefore, their influence on the project and the impact of the project on them is minor. The Fried Egg Diagram reminds us of the value of keeping it simple.

Here's how a Fried Egg Diagram is typically structured:

- **Central Core:** At the center of the diagram is the core or central idea, concept, or entity. This represents the main focus or primary element of the system being depicted.

- **Concentric Circles:** Surrounding the central core are concentric circles or rings, each representing a different layer or level within the system. These circles usually vary in size, with the innermost circle being the smallest and subsequent circles expanding outward.

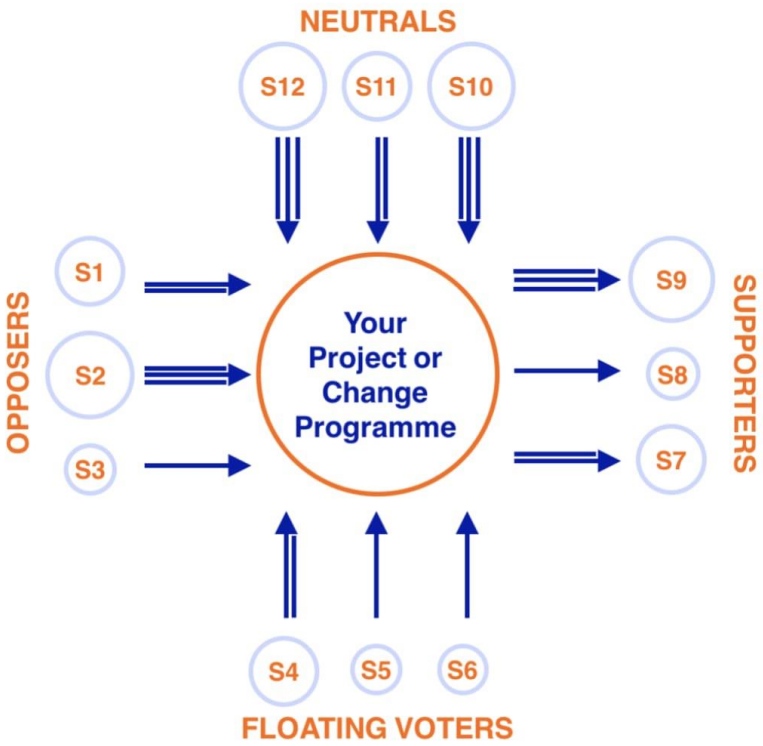
- **Hierarchical Layers:** Each circle corresponds to a hierarchical layer or level of the system. The innermost circle typically represents the core or fundamental components, while outer circles represent broader or more peripheral elements.

- **Labels and Text:** Each circle may contain labels, text, or descriptions to clarify the content or significance of each layer. These labels help viewers understand the relationship between different layers and the overall structure of the system.

- **Arrows or Lines:** Arrows or lines may connect elements between different layers to indicate relationships, dependencies, or flows within the system. These connections help illustrate how elements in one layer relate to those in adjacent layers.

Fried Egg Diagrams are useful for visually organizing complex systems or concepts into hierarchical layers, making them easier to understand and communicate. They can be used to depict organizational structures, project plans, process flows, product features, and more. The concentric layout helps emphasize the central core while providing a clear framework for illustrating the relationships and dependencies between different layers of the system.

5. Force Field Diagram



Stakeholder Force-field Analysis
Reproduced from The Influence Agenda by Dr Mike Clayton (Palgrave Macmillan)

A force Field Diagram is a visual tool used to understand the forces that support or oppose a particular change initiative or decision within an organization. It helps stakeholders identify and analyze the various factors influencing the success or failure of the proposed change.

Here's how a Force Field Diagram typically works:

- **Identify the Change Objective:** Start by defining the specific change initiative or decision that you're analyzing. This could be anything from implementing a new technology system to restructuring organizational processes.

- **Identify Driving Forces:** These are the factors or conditions that support the change and push it forward. Examples of driving forces might include executive sponsorship, regulatory requirements, market demand, or technological advancements.

- **Identify Restraining Forces:** These are the factors or conditions that oppose the change and act as barriers or obstacles. Restraining forces could include resistance from stakeholders, lack of resources or funding, organizational culture, or competing priorities.

- **Assign Scores or Weights:** Once you've identified driving and restraining forces, you can assign scores or weights to each factor to indicate their relative importance or impact on the change initiative.

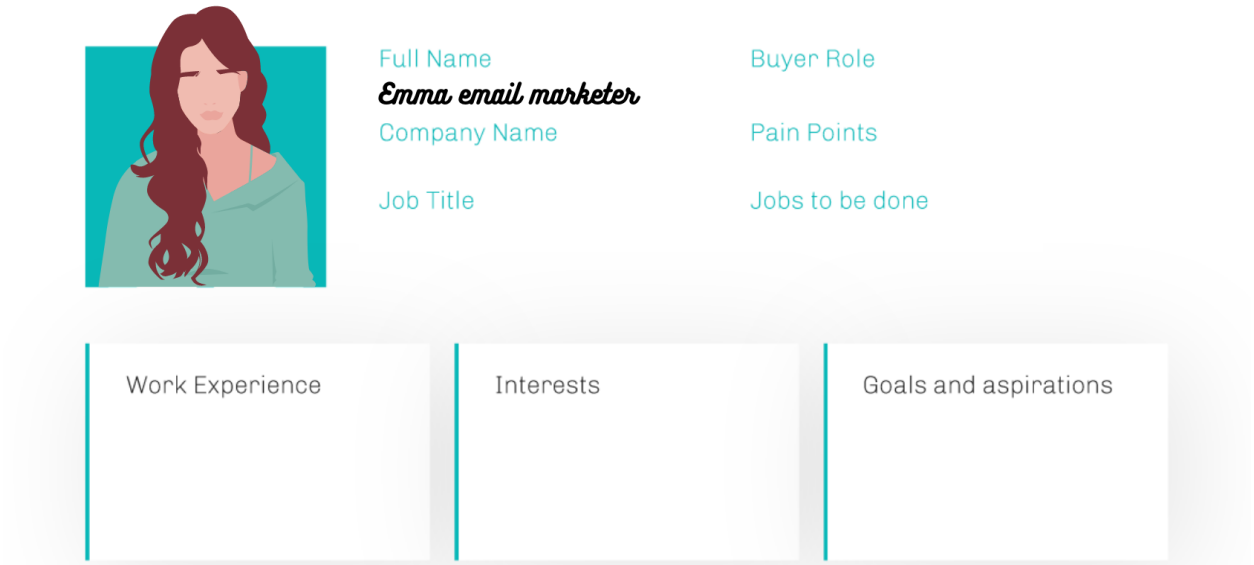
- **Visualize the Forces:** Create a visual representation of the driving and restraining forces using a diagram. This is often done by drawing a horizontal line representing the current state, with arrows pointing to the left (representing restraining forces) and to the right (representing driving forces). The length or thickness of the arrows can reflect the strength or magnitude of each force.

- **Analyze the Balance:** Examine the diagram to assess the overall balance between driving and restraining forces. If the driving forces outweigh the restraining forces, the change initiative is more likely to succeed. Conversely, if the restraining forces dominate, the change may face significant challenges or resistance.

- **Develop Strategies:** Use the insights gained from the Force Field Diagram to develop strategies for managing and mitigating the restraining forces while leveraging and strengthening the driving forces. This might involve addressing concerns, building support among key stakeholders, allocating resources, or adjusting the implementation approach.

By visualizing the forces at play in a change initiative, stakeholders can gain a deeper understanding of the dynamics involved and make more informed decisions about how to navigate and manage the change process effectively.

6. Persona Cards



Persona cards are tools used to represent and understand different stakeholders involved in a project, initiative, or organization. These cards typically contain information about fictional or real stakeholders, helping project teams and managers to empathize with their needs, preferences, goals, and behaviors.

Here's how persona cards are typically created and used:

- **Identify Stakeholder Groups:** Start by identifying the key stakeholder groups relevant to the project or initiative. These may include customers, employees, suppliers, regulators, community members, or any other individuals or organizations affected by or influencing the project.

- **Create Personas:** For each stakeholder group, develop one or more personas, which are fictional characters representing typical members of that group. Each persona should have a name, demographic information (such as age, gender, occupation), goals, motivations, pain points, preferences, power that they hold, their needs, their impact, attitudes, influence, and any other relevant characteristics you consider necessary. Personas are often based on research, interviews, surveys, or observations of real stakeholders. Remember to keep this

information safe and to not add information that you wouldn't like to share in public.

- **Design Persona Cards:** Once the personas are developed, create physical or digital cards for each persona. These cards typically include a picture or illustration of the persona, along with their name, demographic details, and key characteristics. Additional information, such as goals, motivations, and pain points, may also be included.

- **Use in Stakeholder Analysis:** Persona cards are used as part of stakeholder analysis to help project teams and managers understand the perspectives and needs of different stakeholder groups. During workshops, meetings, or brainstorming sessions, team members can reference the persona cards to ensure that stakeholder needs are considered and addressed throughout the project lifecycle.

- **Inform Decision Making:** Persona cards serve as a reference tool for decision-making, helping project teams prioritize project activities based on the needs and preferences of different stakeholder groups. By keeping the personas top of mind, teams can make more user-centric and stakeholder-focused decisions.

- **Update as Needed:** Persona cards should be periodically reviewed and updated to reflect any changes in stakeholder needs, preferences, or behaviors. As the project progresses or new information becomes available, personas may need to be refined or expanded to ensure they remain accurate and relevant.

7. Stakeholder Register

A stakeholder register is a document used in project management to systematically identify and record information about stakeholders who may be impacted by or have an influence on a project. It can be as simple as a spreadsheet or a Word document. The register serves as a central repository of stakeholder information and helps project managers and teams effectively manage stakeholder engagement throughout the project lifecycle.

Here's what a stakeholder register typically includes:

- **Stakeholder Identification:** The register lists all stakeholders who are identified as being relevant to the project. This may include individuals, groups, organizations, or entities both internal and external to the project.

- **Stakeholder Contact Information:** Contact details for each stakeholder are recorded, including names, titles, roles, departments, organizations, email addresses, phone numbers, and any other relevant contact information.

- **Stakeholder Classification:** Stakeholders are classified based on their level of influence, interest, or involvement in the project. Common classifications include primary stakeholders (directly impacted by the project), secondary stakeholders (indirectly impacted), key stakeholders (with significant influence), and minor stakeholders (with limited influence).

- **Stakeholder Analysis:** The register may include a brief analysis of each stakeholder's interests, expectations, concerns, and potential impact on the project. This helps project managers anticipate and address stakeholder needs and concerns proactively.

- **Stakeholder Engagement Strategy:** For key stakeholders or stakeholder groups, the register may outline a tailored engagement strategy, including communication methods, frequency of communication, and key messages to convey.

- **Stakeholder Relationships:** The register may document relationships between stakeholders, including alliances, conflicts, dependencies, and any other relevant dynamics that may impact stakeholder engagement or project outcomes.

- **Stakeholder Management Plan:** In some cases, the stakeholder register may also include details of the stakeholder management plan, which outlines how stakeholders will be identified, analyzed, engaged, and managed throughout the project.

The stakeholder register is a dynamic document that is updated and refined throughout the project lifecycle as new stakeholders are identified, stakeholder relationships evolve, and project circumstances change. It serves as a valuable tool for project managers and teams to ensure effective stakeholder communication, collaboration, and management, ultimately contributing to project success.