

# Stakeholder Management Plan

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**Stakeholder Management Plan:** A roadmap that documents the approach that will be used to effectively identify, engage, manage, and release stakeholders. These activities are critical to elevating the overall success of the project effort.

**Objective:** To ensure that all key stakeholders are identified early, engaged early, and are included in the project activities where appropriate. Additional templates can be found in the [Stakeholder Management System](#).

Activity	Approach
Identify stakeholders	<p>Document the steps that you will be taking to identify the stakeholders.</p> <p>Sample Tasks:</p> <ul style="list-style-type: none"> <li>○ Distribute the Project Stakeholder Worksheet to all team members.</li> <li>○ Add a stakeholder discussion to the kick-off meeting agenda.</li> <li>○ Discuss potential stakeholders, the anticipated impact, and the level of influence in the project effort.</li> <li>○ Capture the information, from the discussion, in the Stakeholder Register.</li> <li>○ Contact the potential stakeholders to confirm that they will be impacted by the project process or project deliverable. Ask how they will be impacted and determine their level of interest in the project.</li> <li>○ Assess the specific roles of the various stakeholders by using the Stakeholder Role Definition Matrix.</li> </ul> <p>Recommended Tools Used:</p> <ul style="list-style-type: none"> <li>○ Stakeholder Glossary for the project team and others who may not be familiar with some of the terminology.</li> <li>○ Stakeholder Quick Reference Guide which details the overall stakeholder management process.</li> <li>○ Stakeholder Management Process Map which visually depicts how the process will unfold.</li> <li>○ Project Stakeholder Worksheet which can be distributed to the project team for review and discussion at the kick-off meeting.</li> <li>○ Stakeholder Register which can be used to capture all the contact information for the identified stakeholders.</li> </ul> <p>Note:</p> <ul style="list-style-type: none"> <li>○ Stakeholders can change throughout the lifecycle of the project. Be diligent with your stakeholder identification process.</li> </ul>

## Planning for stakeholders

Document the steps that you will be taking to help build effective stakeholder relationships.

### Sample Tasks:

- Using the Stakeholder Role Definition Matrix, determine what role the stakeholders are best suited for and some of the tasks that might be appropriate based on their defined role.
- Document the roles and responsibilities in the Stakeholder Register.
- Schedule a requirements gathering session and ask appropriate stakeholders to participate in the activity. TIP: The stakeholders might not know what a requirement is or what a requirements gathering activity might be. Provide them with some information beforehand about the activity, expectations, how to prepare for the event and provide clarity on what the results will be from this session. It would be helpful to provide them with a copy of the Project Charter in advance of the meeting.
- Develop a communication plan for the stakeholders. Consistent communication is critical to the success of any project. Determine what information they will need and what format would be best for them – email, phone call, meeting? Although we will not be able to customize the communication plan to meet the unique needs of all stakeholders, we can determine what the most common themes might be and weave those themes into the overall plan.
- Initiate the change management discussion. Determine what level of change the stakeholders will be experiencing and document those proposed changes in a Change Management Plan. Next steps will include identifying the tasks and actions required to address those changes. These discussions will help prepare the stakeholders for the project deliverable and the changes anticipated.
- Begin to plan for the implementation of the project deliverable. It's never too early to begin discussing how the completed product, service, or result will be delivered to the stakeholder community. Will the result be delivered all at once, or staggered as in a pilot program? Include the stakeholders in the discussion to help plan for a smooth implementation.

### Recommended Tools Used:

- Stakeholder Quick Reference Guide which details the overall stakeholder management process.
- Stakeholder Role Definition Matrix provides the framework for various stakeholder roles and how to keep them engaged in the project.
- Project Team Roles & Responsibilities document that outlines the roles and responsibilities associated with the project, including stakeholders.

### Note:

The easiest way to understand what your stakeholders may need is to ask them. Document their answers and incorporate any of their ideas or suggestions into the project activities where appropriate.

<p>Execution of the plan</p>	<p>Document the steps that you will be taking to help keep the stakeholder community engaged in the project activities.</p> <p>Sample Tasks:</p> <ul style="list-style-type: none"> <li>○ Introduce a consistent communication process that will include a status meeting protocol or report.</li> <li>○ Assess how the various roles will have distinct needs with respect to the project, especially in terms of communication. Stakeholders should not be treated the same – e.g. vendors and end users have unique needs depending on how they will be impacted by the project.</li> <li>○ Create an email distribution list(s) for stakeholders.</li> <li>○ Schedule periodic meetings with the stakeholders and send meeting invites for their calendars. This will enable the stakeholders to ask questions, discuss project progress and deliverables. Meetings can be in-person, teleconferencing or video conferencing. Another idea would be to record a status update and post it to the stakeholder forum. You can then send a link for the recording to the distribution list.</li> <li>○ Draft a FAQ document (Frequently Asked Questions) based on questions from the stakeholders. This document can be revised and updated with new questions and comments from the stakeholder community throughout the lifecycle of the project.</li> <li>○ Establish an online forum which will allow stakeholders to track and monitor the progress of the project.</li> <li>○ Identify a Point of Contact for stakeholders. Someone that they can contact directly if they have questions or comments.</li> </ul>
<p>Monitoring the plan</p>	<p>Document the steps you will be taking to monitor the stakeholder plan.</p> <p>Sample Tasks:</p> <ul style="list-style-type: none"> <li>○ Determine how often the stakeholder plan will be revisited with the project team. This will depend on the complexity and duration of the project. Remember that stakeholders can, and will, change.</li> <li>○ Develop a standard status report that will provide meaningful information to the stakeholder community. Keep in mind that the stakeholders may be looking for different information on project status based on their role.</li> <li>○ Establish a communication calendar that will ensure timely and consistent communications for the stakeholder community.</li> <li>○ Continuously assess the stakeholder community for new, or changing, stakeholders. Repeat the stakeholder identification process as needed.</li> <li>○ Provide the engaged stakeholders with tasks that are meaningful and helpful to the project effort. Follow up on those tasks for completion.</li> </ul> <p>Note:</p>

	<ul style="list-style-type: none"> <li>○ During the monitoring phase it would be advantageous to review the plan to determine what elements of the plan are working well and what needs to be changed based on input from the project team or stakeholders. Incorporate these modifications into plan for future reference and planning efforts.</li> </ul>
Closing the plan	<p>Document the steps you will be taking to close out the stakeholder management plan once the project deliverable has been completed.</p> <p>Sample Tasks:</p> <ul style="list-style-type: none"> <li>○ Review the implementation plan and the change management plan with the stakeholder community.</li> <li>○ Begin rolling out all the actions identified in the change management plan such as training, user documentation, quick reference cards and other tools to help the stakeholder community adapt to the end result of the project.</li> <li>○ The implementation plan will also be engaged as the way in which the project will come to fruition. For instance, will the project be delivered to everyone at once? Will it be staggered – if so, how will the implementation be staggered and what is the timeline? Will there be a pilot program? Although these decisions would have been made earlier in the project process this is the stage in which we will act upon those decisions.</li> <li>○ Analyze the gaps between the delivered results and the stakeholder expectations. Document those outstanding items to discuss at a post-project meeting with the team.</li> <li>○ Schedule and facilitate a lessons learned session with the stakeholders to capture their observations and feedback about the project process and deliverable(s).</li> <li>○ Post-implementation follow-up with all stakeholders thanking them for their interest, commitment, and engagement in the project efforts and provide a synopsis on what the project delivered and their contributions. This also includes “releasing” the stakeholders from the project. Their work is complete.</li> </ul> <p>Recommended Tools Used:</p> <ul style="list-style-type: none"> <li>○ Stakeholder Lessons Learned</li> </ul>

After documenting all the steps that will be taken to effectively manage the stakeholders, share this draft document with the project team for review and comment.