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IDING AND DESCRIBING PROJECT STAKEHOLDERS AND PERSONAS

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IDENTIFY THEM - BUT TO WHAT END?

It is important to begin with the end in mind. Everything you do on a project is an effort to create a successful outcome. Someone, somewhere, has labored over justifying your project and the organization has determined it's something that must be done. Maybe it will improve customer service, reduce error processing, or increase sales. Maybe it needs to be done to be in compliance with regulations so the organization doesn't face fines or high corporate officials don't have to make bail.

IDENTIFY THEM - BUT TO WHAT END?

Whatever the project justification and the goal, many things need to be done to ensure success. As Business Analysts, we tend to think along the lines of getting the requirements right – a project that is on time, within budget with poor requirements is a failure. It's not just getting those requirements but engaging stakeholders for many reasons. How do we know who knows what? So that's part of why you need to be diligent on identifying stakeholders, but there's more. There are:

- Stakeholders who are Subject Matter Experts (SMEs) and provide the bulk of the detailed requirements.
    - If this project is messed up, they are the ones who really pay for it, which means you pay for it.
- Stakeholders who don't know enough at the detailed-level to provide any requirements but are very involved.
    - They might not want to take the heat in the kitchen, but they will get burned too if this thing goes down in flames. And they'll be coming after you.
- Stakeholders who manage the stakeholders who are SMEs and want to ensure success because it has something to do with their department (i.e. reduce processing errors, improve customer satisfaction, etc.).
    - They want it to be successful, so they have a successful department and their careers are advanced.
    - They imagine their resume saying something like "Enabled the department of XYZ to attain blah, blah, blah." So you bet they care.
    - And if this project is messed up, someone is going to pay for it and that would be you.

- Top executives who have a stake in this – maybe their compensation package is partially dependent on achieving certain goals that this project delivers. Yes, it's unfair that you're doing the work and they get some bonus to help pay for the car you can't afford anyway, but that's a different story.
    - And if they don't get their bonuses, guess who pays.
- Stakeholders who are internal users of this thing who definitely have a say in how it works, what they need, ID things that will make their lives easier while attaining the ultimate goals.
    - And if this thing is messed up, they will be loudly complaining and that comes back on you and the team.
- Stakeholders who are external users, your customers, who access this thing to do something – order things or provide something. Who will represent them?
    - Who will end up taking the heat if the customers find that this thing is messed up? But this is on you too. You'll be part of the team getting the heat.
- Stakeholders who are actually working on the project, called "Implementation SMEs" in the BABOK. BA's, developers, testers, architects, data analysts.
    - They want it to be successful so they can just stay out of trouble. If this thing goes down, you and all of them pay.

SO YOU'RE DOING IT FOR YOUR OWN SELFISH BENEFIT: LET'S FACE IT

So what's in it for you?

- You want the project to be successful.
- You want your career to flourish.
- You want to be seen as a valued employee.
- You want the satisfaction of being part of a team that delivers something that makes a difference.
- You want to reach self-actualization.
- And, you want it to be over in such a way that they are not hunting you down to get a pound of flesh or its equivalent.

So, it's a Win-Win. The stakeholders get what they want so you can get what you want.
With the end in mind:

- End users lives' are made better. They can do their work with a system that helps them.
- People nearby hear good things about the new system and are happy.
- Executives get their bonuses and park the I-can't-afford-that-car in the reserved parking that you can see while you trek across from the employee parking lot way over there.
- External customers are happy with the gleaming system and order more stuff or whatever.
- Everyone stays out of jail.
- The organization doesn't have to pay any non-compliance fines.
- Your status is enhanced and you can update your resume and LinkedIn status.

But, this all depends on identifying the various stakeholders so we can all get what we want!

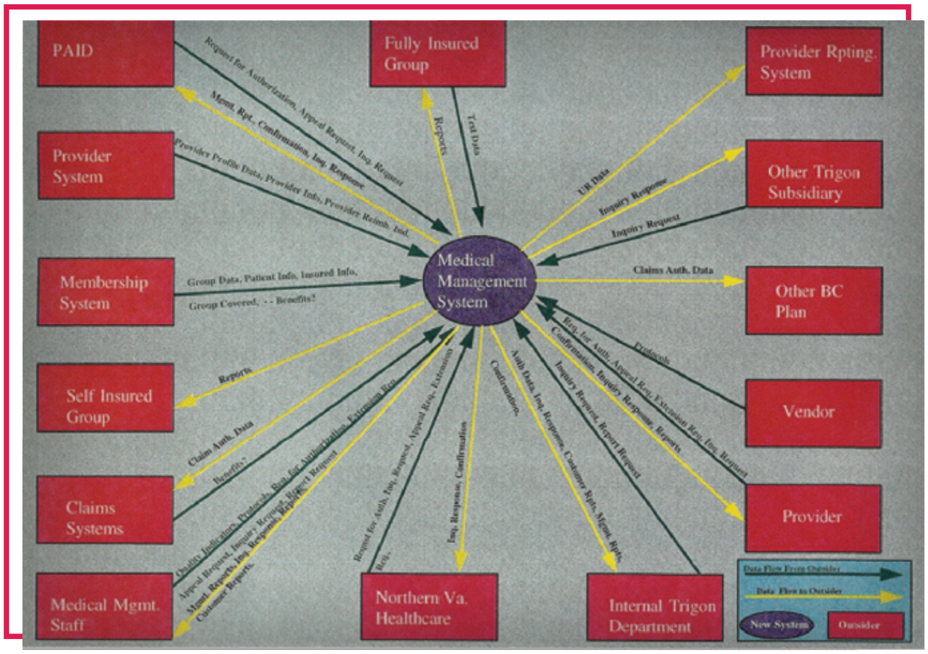
MEET WITH ALL THE STAKEHOLDERS FOR AN INITIAL KICK-OFF MEETING

- Send an email to the identified stakeholders letting them know that they've been initially identified as stakeholders inviting them to a kick-off meeting.
- At the kick-off meeting, of course, explain the goals of the project and all the usual kick-off agenda items.
    - Hand out a list of all identified stakeholders and the departments they represent.
    - Ask if there is:
        - Anyone else not on this list who can affect or be affected by this project?
        - Anyone else not on this list who can make a decision about this project?
        - Anyone else not on this list who cares about how this project is implemented?

IDENTIFY ADDITIONAL STAKEHOLDERS BY CREATING A CONTEXT DIAGRAM

After you have completed the previous steps, there might be even more stakeholders no one realizes at this point. With a selected mixture of stakeholders – experienced business SMEs, some experienced developers, and others – hold a meeting to collaboratively create a Caontext Diagram – a high-level data flow of the actors who send and/or receive information to/from the system.

Actual Context Diagram from an old project of mine:



Steps:

1. Review the project request.
2. Brainstorm the actors – people, systems, or organizations who send/receive info.
3. ID what comes in/goes out from whom/to whom. There are two approaches:
   a. Start at one actor and ask what comes in/what goes out
   b. Or, ask how the process starts – what comes in, what happens next, what goes out to whom or what else comes in from whom. Even though a Context Diagram is not supposed to show sequence, sometimes it is easier for stakeholders to describe it in sequential order.
4. Now you've identified additional actors – the senders/receivers - possibly and someone needs to represent each one of these red boxes. Ask the folks in the room since they've been able to ID the actors, it's likely they have ideas on who is at least your initial contact.

DESCRIBE THE STAKEHOLDERS

So, at this point, you've hopefully identified all known stakeholders, but of course, more can be revealed as the project progresses. Now, you have to determine how detailed you need to get.

There are many types of stakeholders – complainers, depressing negativists, jerks – hah, just kidding. There are many categories of stakeholders and determining these categories helps you better manage the engagement you'll have with them. Some just need to be communicated with, some need to be regularly involved, some need to provide approvals, etc.

Some possible attributes to capture about each stakeholder are:

- Role and responsibility (i.e. Manager of Operations)
- Concerns (i.e. worried that the transition to a new system may impact processing cycles)
- Interests (i.e. wants the new system to address all the shortcomings of the old one, wants to improve processing accuracy, wants training new employees to be easy and straightforward)
- Success Criteria (i.e. how do we measure the interests?)
- Attitude (i.e. a big cheerleader for replacing the old system)
- Level of Power (i.e. has significant positional power)
- Level of Interest (i.e. has a very low level of interest)
- Decision-making authority (i.e. not an approver but her boss, Ms. Jones, approves our decisions)

MANAGING STAKEHOLDER ENGAGEMENT

The Power/Interest Stakeholder Matrix is a way to help you engage stakeholders based on your analysis of them.

	High Interest	Low Interest
High Power	Engage Directly	Keep them Satisfied
Low Power	Communicate Regularly	Communicate Only When Necessary

Steps:

1. Place two flipcharts taped together on a wall.
2. Draw the matrix.
3. Write each stakeholder on a post-it note with comments to help you remember tidbits.
4. Sort the post-it notes on the matrix.

PERSONAS – ANOTHER WAY TO UNDERSTAND STAKEHOLDERS BETTER TO ID REQUIREMENTS

The concept of Personas was hatched around 1993, years before Agile was on the scene. But the idea of using Personas has been more readily adopted by Agile teams and is applicable to any methodology.

The idea is to ID all the “who’s” on your project, specifically the actors, and create Personas that describe how they interact with the system and what they want. One technique is to give each “who” a name so the team starts referring to that Persona by name vs. a role – like George is a vendor, and Tina is a direct internal user. Even include a photo so the team can better identify with that Persona.

Additionally, it goes beyond that. A millennial customer, Heather, interacts with your organization differently than Uncle Jake, a retiree. If you consider a system that is for airline passengers, Mel, the road warrior, has different needs than Barney, who travels once a year.

One approach is to assign different Personas to different team members and have them flesh out a detailed Persona that is reviewed by the team. Another approach is that team members are assigned Personas and they create a high-level Persona, and the team then collaborates to fill in the details. Below is an example.

PICTURE AND NAME

SALLY

DETAILS

Role: Customer who is a full time working mom, planning a family vacation with kids in Italy on our site. She has limited time to do this and wants a stellar result for all. Sally is very proficient with PCs and other devices.

GOAL

“I want one stop shopping to plan the vacation easily and quickly to include activities that the whole family will enjoy.”

IN CONCLUSION

Stay out of the proverbial ditch by allocating time to identifying stakeholders, what they want and their levels of power and interest so you can best manage your engagement with them. By doing this, you maximize the probability of defining requirements as best as can be done, thereby ensuring project success and keeping you out of trouble.

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ABOUT THE AUTHOR

Rob is an accomplished corporate trainer, teaching courses in business analysis, requirements development, use cases, strategic planning, project planning and facilitating JAD sessions. He has planned and facilitated hundreds of workshops including project planning workshops, strategic planning events, JAD requirements sessions and many other types of collaborative solution workshops for organizations both in the United States and abroad. As a seasoned expert in business analysis and system requirements and analysis, Rob is both a gifted and experienced enterprise trainer and real-world project/ business veteran.

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