



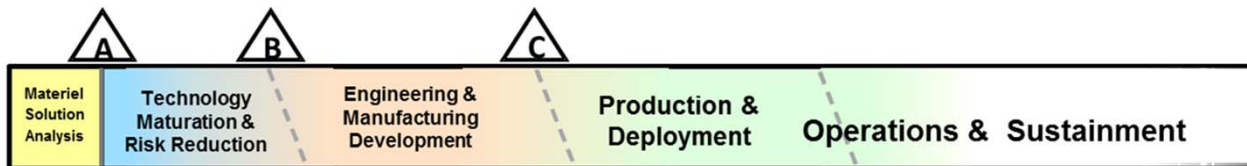
Tools to Improve Your Stakeholder Relationships

Steve Brown, C.P.L.

April 3rd 2018

Learn. Perform. Succeed

Why is Stakeholder Engagement Important in DoD System Acquisition & Sustainment?



DoD System Management Framework

Stakeholder Terminology



What is a "Stakeholder"?

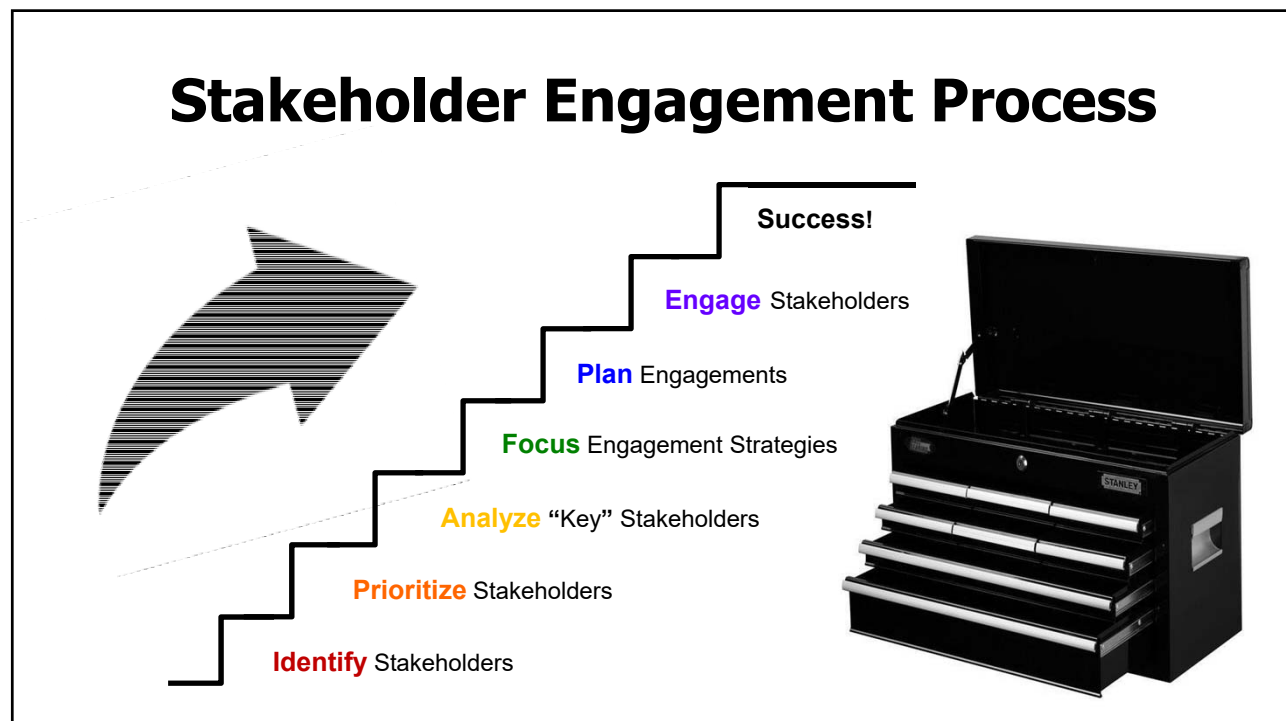
"Someone impacted by your project/program
or capable of influencing its outcome"

- Can include **individuals** and/or **groups**
- Both **inside** and **outside** your organization
- Can be positively or negatively **impacted**
- Can positively or negatively **influence outcomes**

What is the “Stakeholder Engagement Process”?

The Stakeholder Engagement Process involves 7 stages which will increase the probability that project/program succeeds

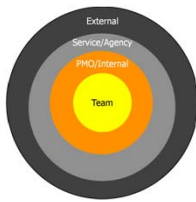
- **Engagement** of stakeholders
- **Planning** to engage stakeholders





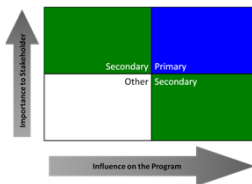
Stakeholder Engagement Planning Tools

Identify Stakeholders



Stakeholder Map

Prioritize Stakeholders



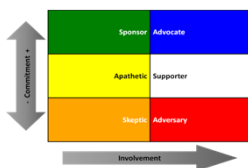
Power Grid

Analyze Key Stakeholder Relationship Ratings &

- Requirements
- Expectations
- Interests



Focus Engagements



Focus Matrix

Plan Engagements

- What
- How
- Who
- When

Engage Stakeholders!



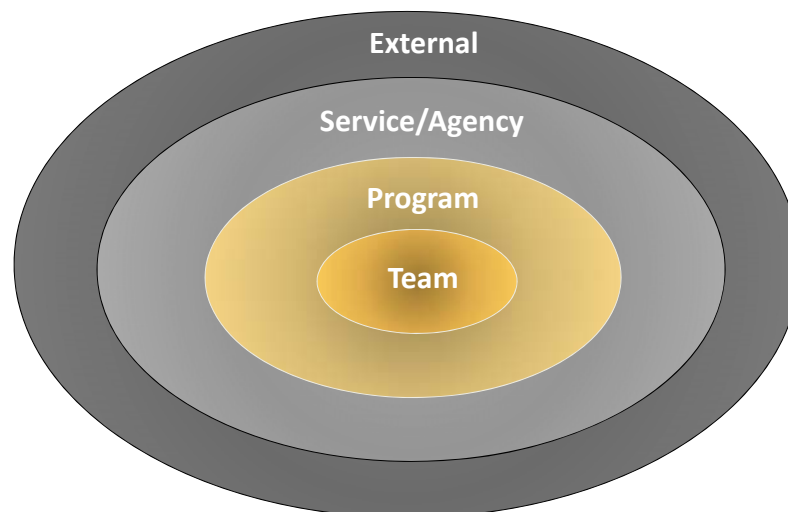
STEP Software Tool

Identify Stakeholders

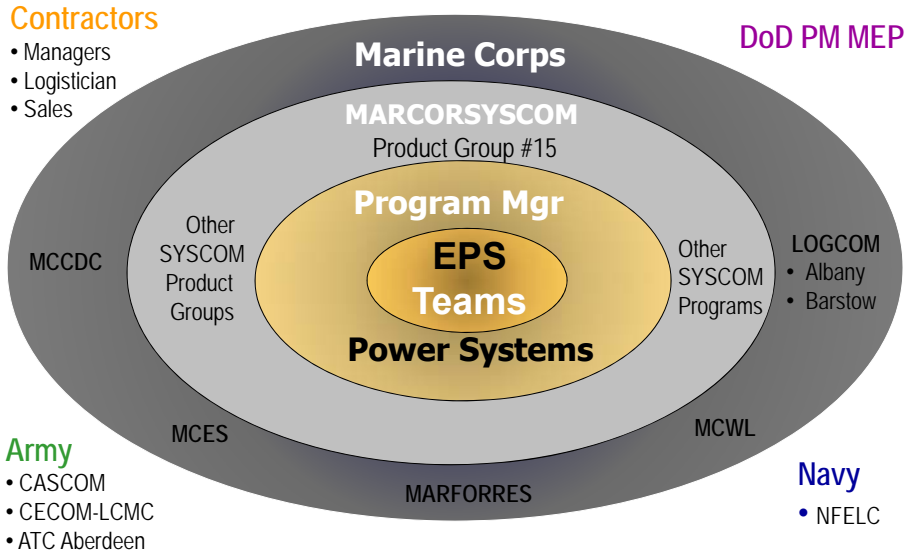
- Stakeholder Mapping
- Sample Stakeholder Maps
- Stakeholder “Flavors”



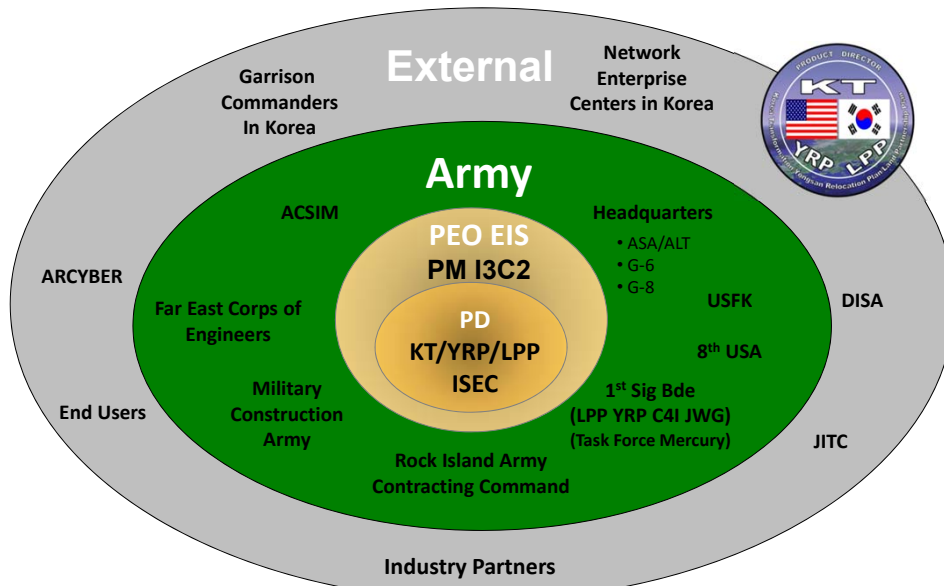
Sample Stakeholder Map Template

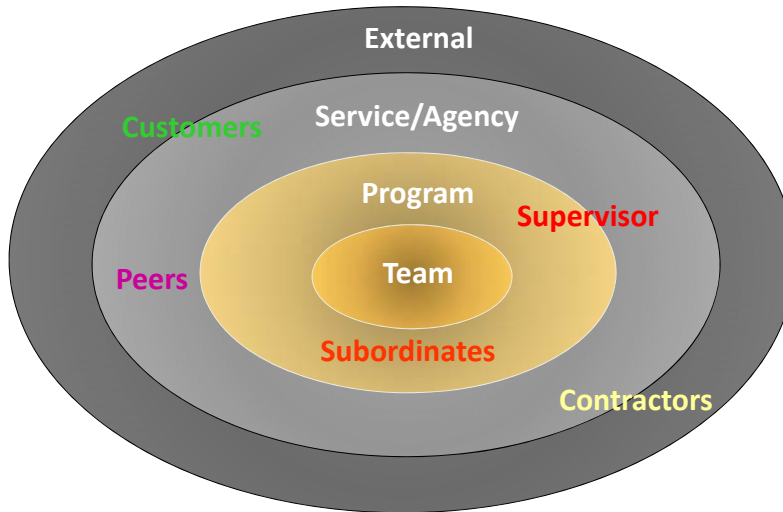


Sample USMC Program Stakeholder Map



Sample Army Program Stakeholder Map



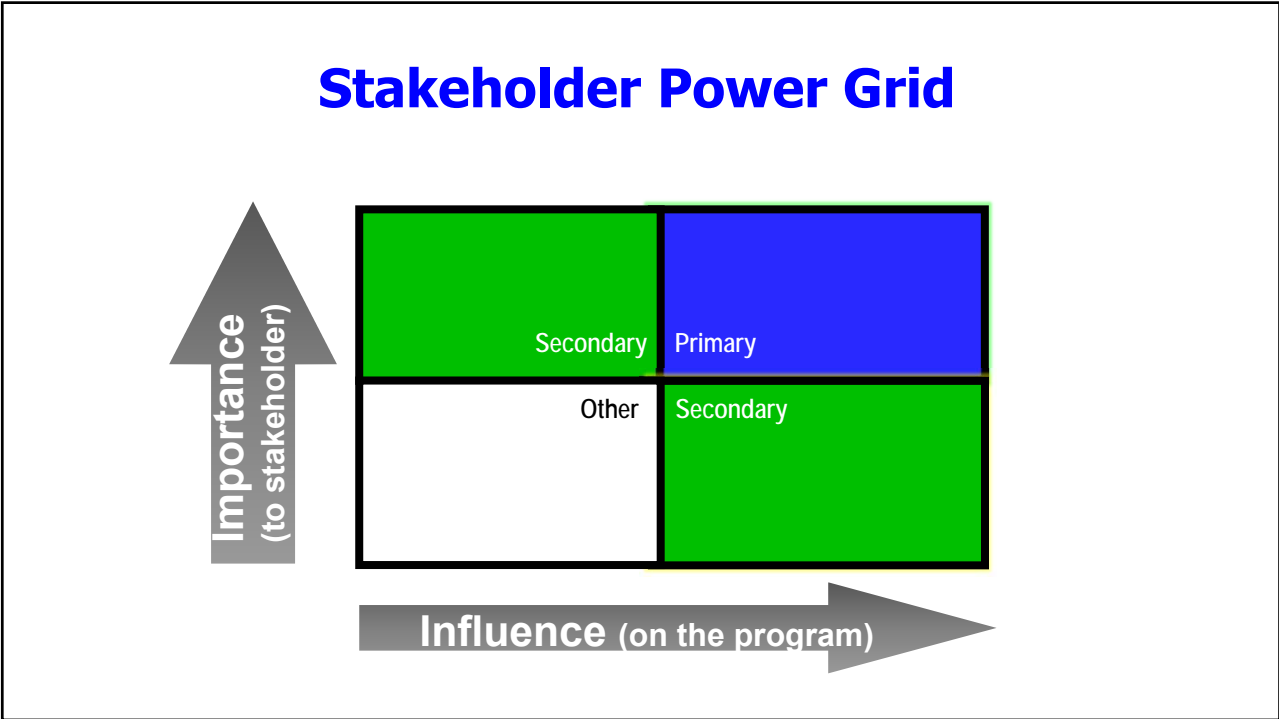
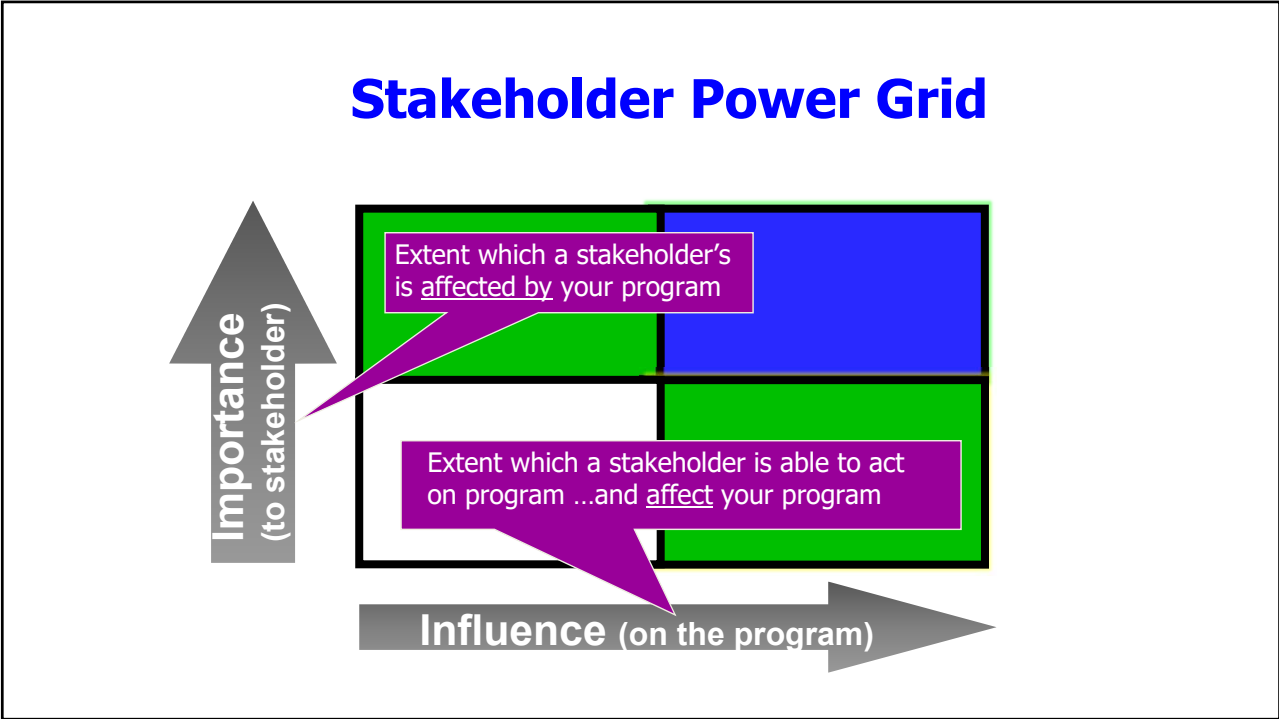


There are at Least Five Different 'Flavors' of Stakeholders

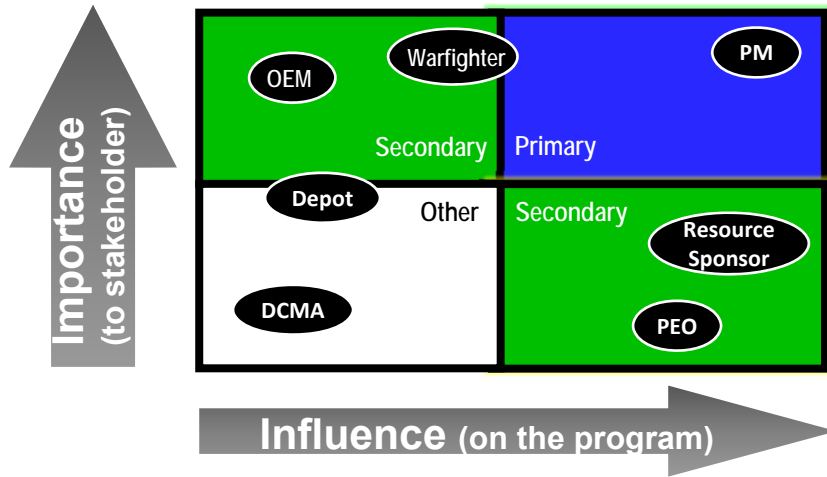
Prioritize Stakeholders

- Influence & Importance
- The Power Grid
- "Key" Stakeholders

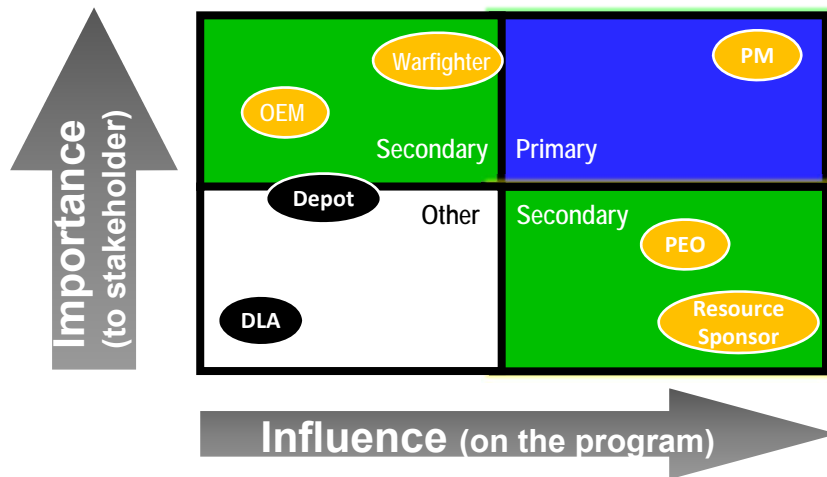




Sample of Stakeholders



Sample Power Grid & Key Stakeholders



Analyze Key Stakeholders

- Relationship Ratings
- Requirements
- Expectations
- Interests



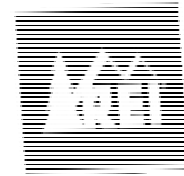
SAMPLE Stakeholder Analysis

<u>Stakeholder</u>	<u>Relationship</u>
Program Manager	Good (worked with for 3+ years in a previous job)
User Representative	Fair (pilot does not speak the same language, no acquisition experience)
Program Executive Officer	None (newly assigned Brigadier General)
...	

SAMPLE Stakeholder Analysis

<u>Stakeholder</u>	<u>Relationship</u>	<u>Requirements</u>	<u>Expectations</u>	<u>Interests</u>
Program Manager	Good (worked with for 3+ years in a previous job)	Program Acquisition Strategy and APB	Wants to look good (pursuing promotion to SES / General)	Measureable program cost, schedule, performance
User Representative	Fair (pilot does not speak the same language, no acquisition experience)	System requirements documents (CDD, CPD)	Wants system fielded on time and to be highly supportable	Does <u>not</u> like surprises
Program Executive Officer	None (newly assigned Brigadier General)	Acquisition Program Baseline	Does <u>not</u> want to waste time with details	Bottom Line Up Front ("BLUF")
...				

Key Stakeholder Analysis



Requirements: Measurable product, service, result or accomplishment "*What We Agree To*"

- Often directly traceable to deliverable(s)

Expectations: What internally motivates stakeholder (people or organization) "*What I Want*"

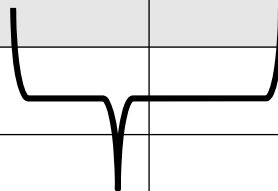
- True stakes are rarely communicated in writing

Interests: How a stakeholder prefers that something is approached or completed "*What I Like*"

- Often reflects communication preference

Stakeholder Analysis

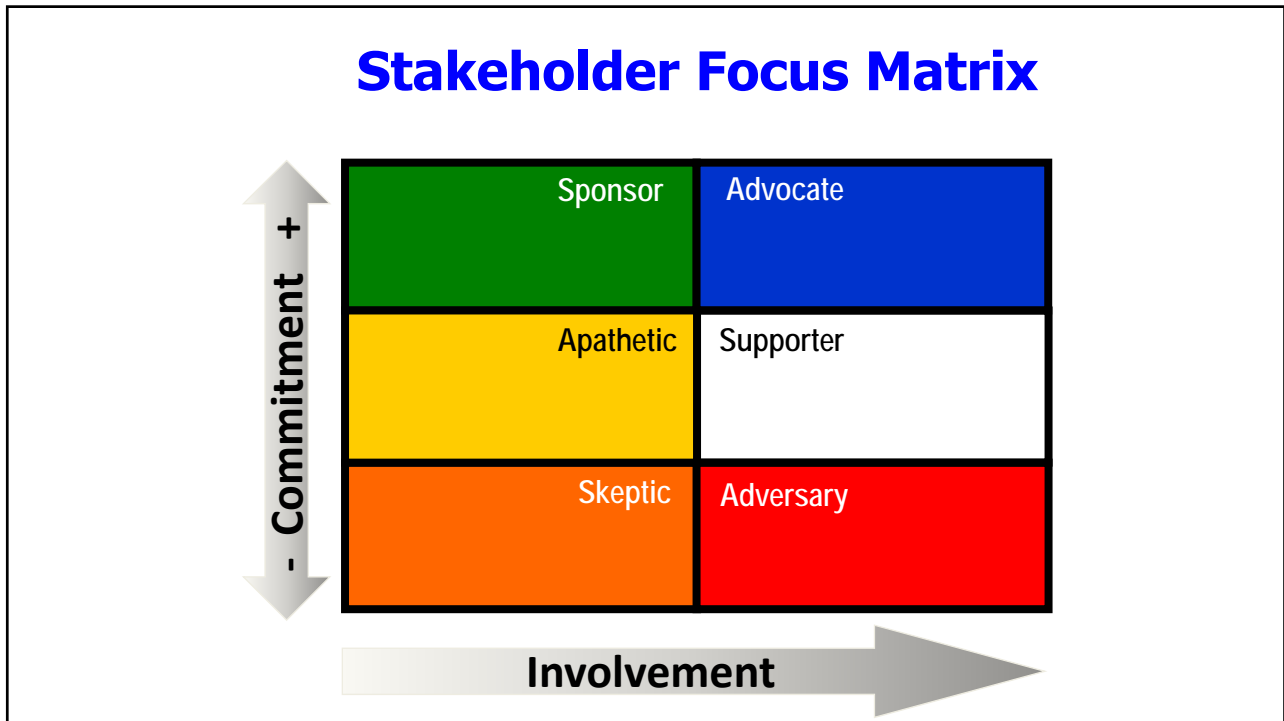
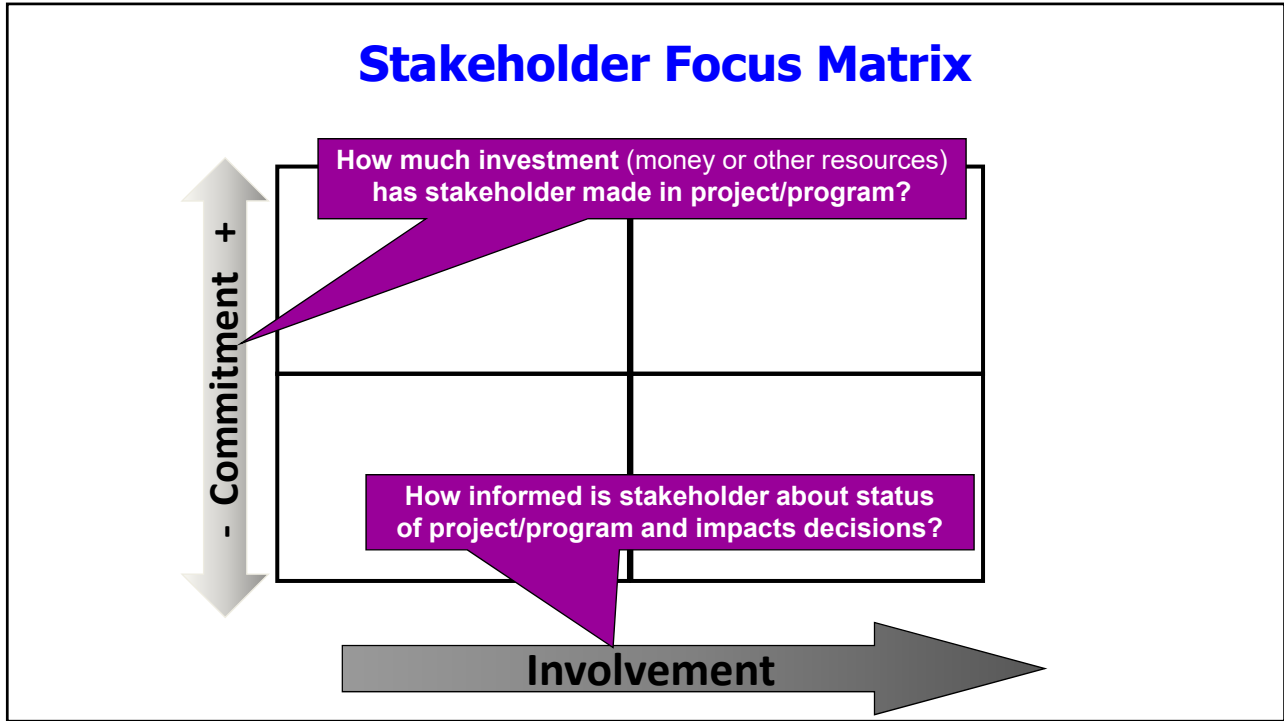


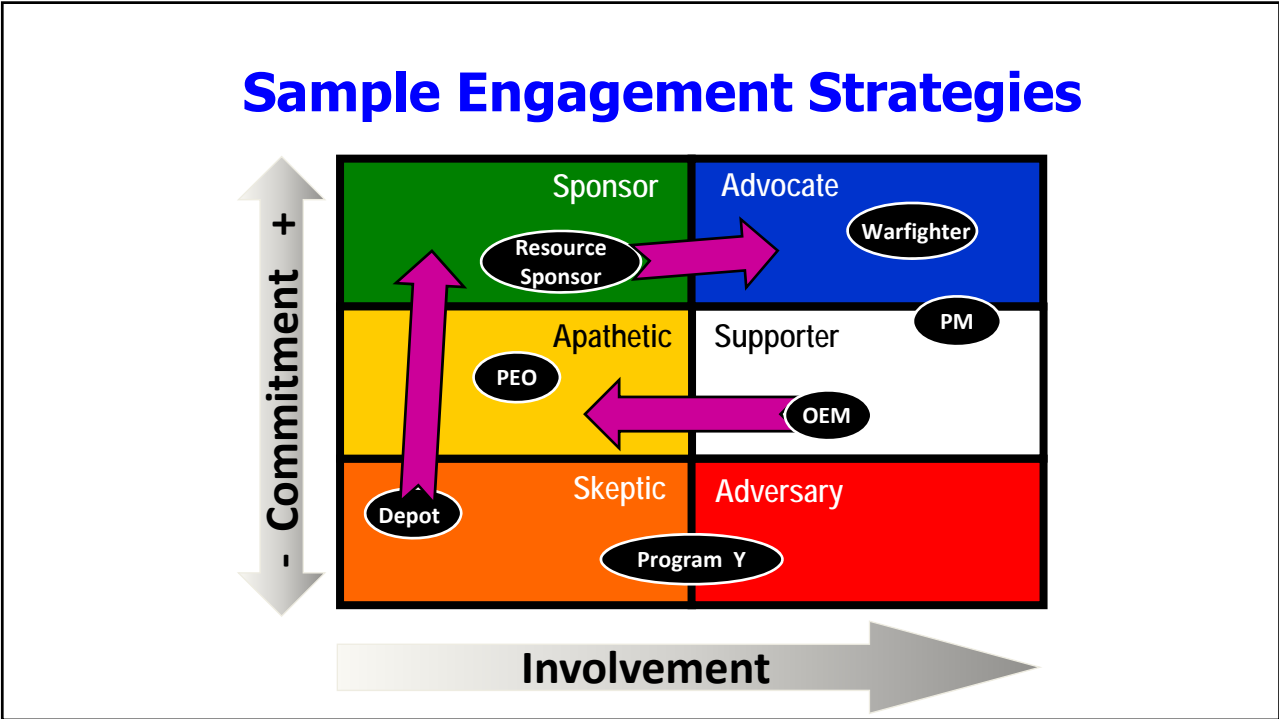
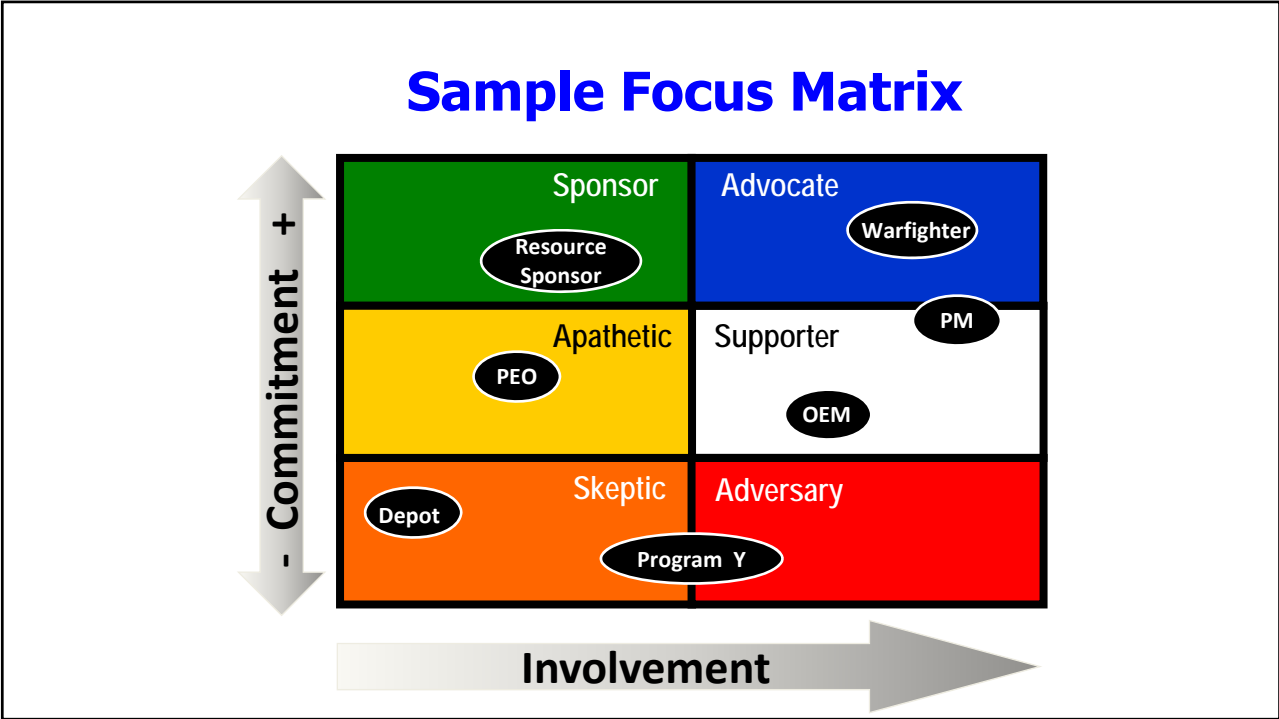
Stakeholder	Requirements	Expectations	Interests
Customers		 “Invisible Requirements”	
Supervisor			
Subordinates			
Contractors			
Peers			

Focus Engagement Strategies

- Involvement & Commitment
- The Focus Matrix
- Your Focus Matrix
- Sample Engagement Strategies

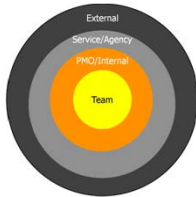






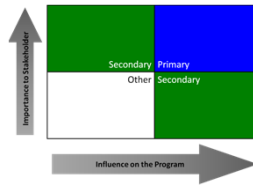
Stakeholder Engagement Planning Tools

Identify Stakeholders



Stakeholder Map

Prioritize Stakeholders



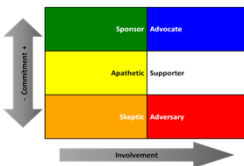
Power Grid

Analyze Key Stakeholder Relationship Ratings &

- Requirements
- Expectations
- Interests



Focus Engagements



Focus Matrix

Plan Engagements

- What
- How
- Who
- When

Engage Stakeholders!



STEP Software Tool

Stakeholder Engagement Plans

- **What:** strategy action verb
- **How:** describe specifics
- **When:** date or frequency
- **Who:** name(s) or position(s)
- **Success:** short term & long term
- **Why:** reason to engage key stakeholder
- Other



Stakeholder Tactical Engagement Planning ("STEP") Software Tool



Prioritize Stakeholders

Select each stakeholder's label on the legend below the grid to reveal that stakeholder, and then use your mouse to drag the stakeholder from the origin to the desired position on the grid. Select the "Submit Changes" button when you are finished. You can use the legend below the chart to reveal a grid line to help you identify key stakeholders. Click the grid key icon (enabled by default) in the table below to subordinate key stakeholders (i.e., grid key equals key stakeholder). **NOTE: Only key stakeholders will carry forward after this step.**

Focus Stakeholder Engagements

Select each stakeholder's label in the legend below the matrix to reveal that stakeholder, and then use your mouse to drag the stakeholder from the origin to their current position on the matrix. Select the people dot that appears once you position the stakeholder and use your mouse to drag it to the desired position for that stakeholder on the matrix. Select "Submit Changes" when you are finished.

Status Engagement Actions

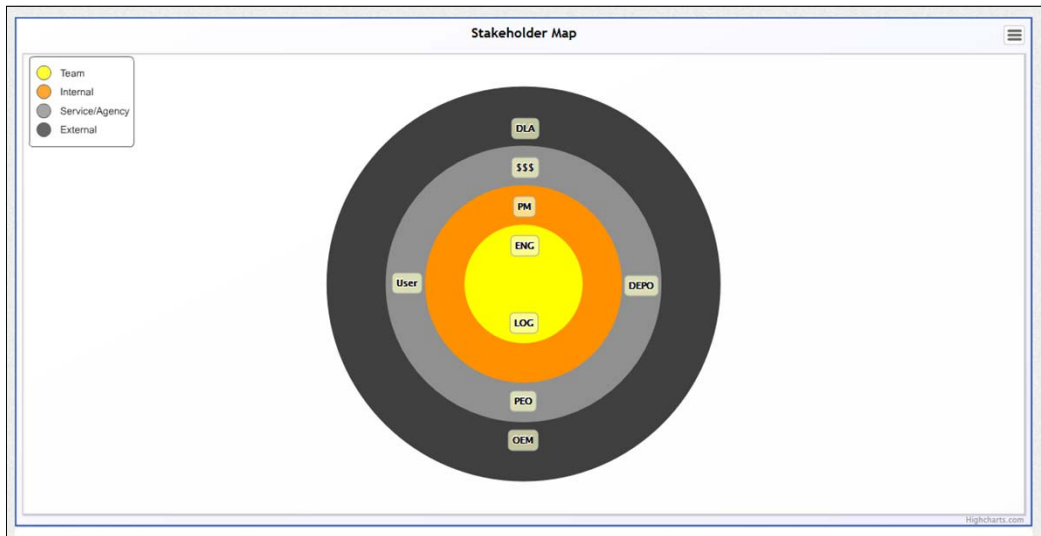
For each engagement action, use the dropdown menu to indicate the status of that action. Enter any relevant information in the Comment field. Select "Submit Changes" when you are finished.

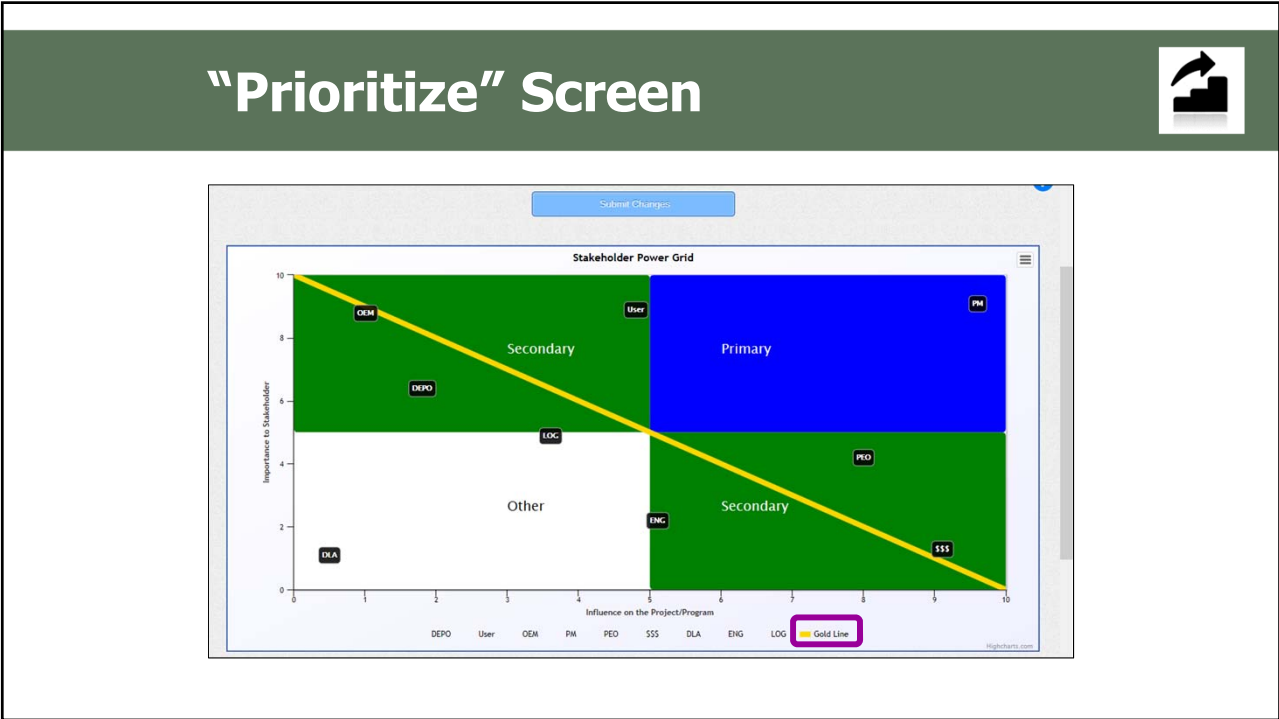
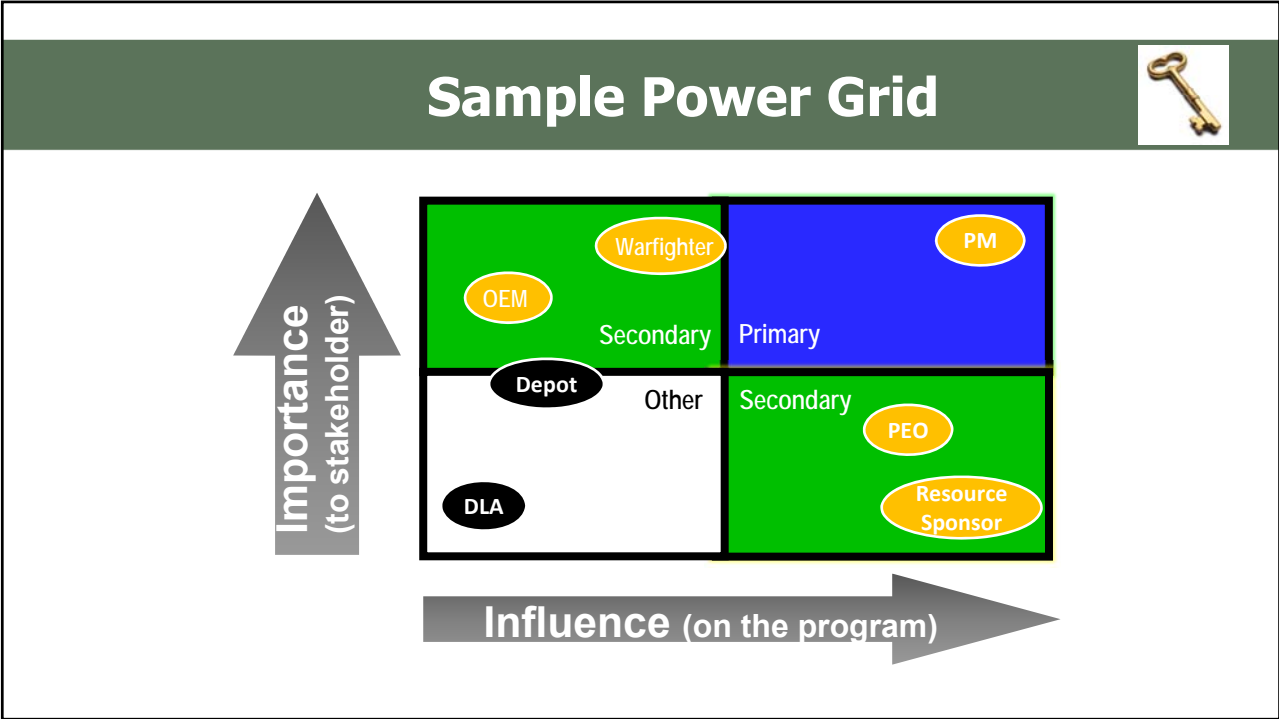
Position	Desired Focus	Action Title	Success Criteria	Action Status	Comment
Contractor (DEM)	Apathetic	Roadside	Stable design that accurately reflects using commands requirements.	On Target	
Maintenance Depot	Sponsor	Consult	Finalized transition plan with buy in from both parties.	Needs New Plan	OEM because of personnel changes at the depot.
Resource Sponsor	Advocate	Energize	Resource sponsor attendance at quarterly key stakeholder briefing.	Achieved	
Resource Sponsor	Advocate	Inform	Increased funding to cover accelerated schedule.	Needs Attention	Need to refine our outreach strategy. Current message doesn't s

Plans for each stakeholder

- DEPO: Not selected (Needs New Plan) Consult
- What: Increase commitment of electronics repair division to invest in planning transition
- How: Solicit feedback about resources and lead time needed to stand up capacity to overhaul components 1) Conduct orientation briefing with electronics repair division leadership. 2) Invite depot POC to participate in planning meetings with program POC. 3) Schedule site visit to contractor repair facility with depot POC.
- When: In September. From 2nd P-EM to Maintenance Repair Dept.

"Identify" Screen





"Analyze" Screen



DAU Home Identify Prioritize **Analyze** Focus Plan Status Show Export User Guide Logout

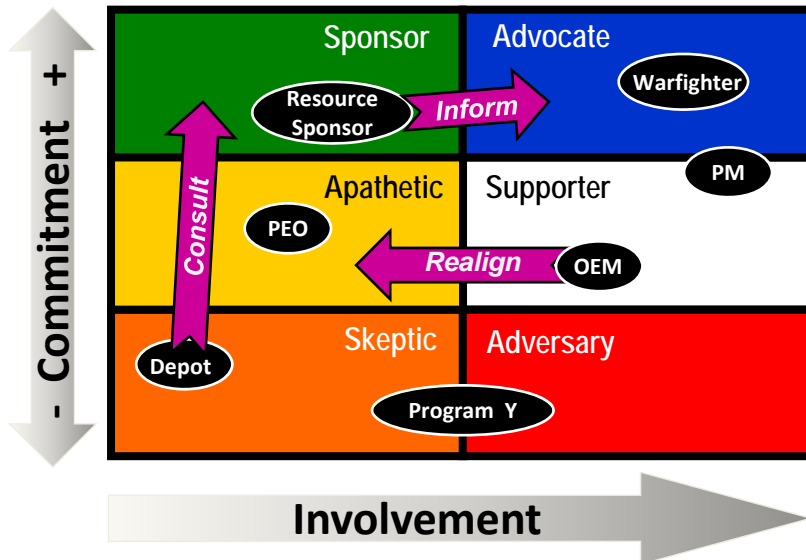
Analyze Stakeholders

Use the text entry fields below to enter Interests, Expectations, Requirements, and Current Relationship for each key stakeholder. Select 'Submit Changes' when you are finished.

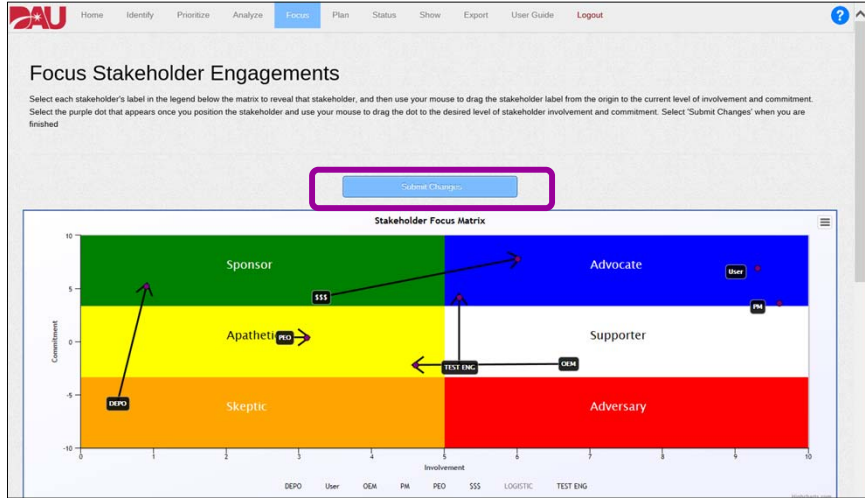
[Submit Changes](#)

Position	Interests	Expectations	Requirements	Current Relationship
Maintenance Depot	Unknown - Need to establish point of contact	Unknown - Need to establish point of contact	Draft Memorandum of Agreement in coordination	Poor
Using Command	Wants system to be fielded on time and to be highly supportable	Does not like surprises	Requirements documents (CDD, CPD)	Good
Contractor (OEM)	High ratings in CPARS to help obtain additional contracts	Progress payments and incentive fees on current contract	Contract and multiple modifications	Fair
Program Manager	Pursuing promotion to SES / GO	Report positive program cost, schedule, performance	Program Acquisition Strategy and Acquisition Program Baseline	Great
Program Executive Officer	Bottom line up front (BLUF)	Does not want to waste time with details	Acquisition Program Baseline	Good
Resource Sponsor	Unknown - Need introduction	Unknown - Need introduction	Budget documents	Not selected
Logistics				Not selected
Lead Test Engineer				Not selected

Sample Focus Matrix



"Focus" Screen



"Plan" Screen



Plan Stakeholder Engagements

Use the form below to enter an engagement action. Select 'Submit Changes' when you are finished, and your action will appear in the accordion control beside the form, sorted by stakeholder.


Plans for each stakeholder

- 1 Maintenance Depot - Consult
- 2 Contractor (OEM) - Realign
- 3 Resource Sponsor - Energize
- 4 Resource Sponsor - Inform

Buttons: Submit Changes

Form Fields: Choose Key Stakeholder, Current Focus (Involvement, Commitment), Desired Focus (Involvement, Commitment), Action Title, What, How, Who

"Plan" Screen



Plans for each stakeholder

- Maintenance Depot - Consult
- Contractor (OEM) - Realign
- Resource Sponsor - Energize
- Resource Sponsor - Inform

Submit Changes

Choose Key Stakeholder
Maintenance Depot

Current Focus (Involvement, Commitment)
0.5 - 5.8

Desired Focus (Involvement, Commitment)
0.9 - 5.2

Action Title
Consult


Required
What
Increase commitment of electronics repair division to invest in planning transition.

How
Solicit feedback about resources and lead time needed to stand up capacity to overhaul components
1) Conduct orientation briefing with electronics repair division leadership.
2) Invite depot POC to participate in planning meetings with program PST.
3) Schedule site visit to contractor repair facility with depot POC.

Who
1) Maintenance Team Chief
2) PSM
3) Maintenance Team Chief

When

"Plan" Screen



Plans for each stakeholder

- Maintenance Depot - Consult
- Contractor (OEM) - Realign
- Resource Sponsor - Energize
- Resource Sponsor - Inform

Submit Changes

Choose Key Stakeholder
--- Choose ---

Current Focus (Involvement, Commitment)

Desired Focus (Involvement, Commitment)

Action Title

What

How

Who

When

What: Increase commitment of electronics repair division to invest in planning transition.

How: Solicit feedback about resources and lead time needed to stand up capacity to overhaul components
1) Conduct orientation briefing with electronics repair division leadership. 2) Invite depot POC to participate in planning meetings with program PST. 3) Schedule site visit to contractor repair facility with depot POC.

Who: 1) Maintenance Team Chief 2) PSM 3) Maintenance Team Chief

When: EoQ2 FY18

Success: Finalized transition plan with buy in from both parties.

Why: Start transition planning for organic repair to provide an alternative to costly ICS.

Other:

Edit Delete

"Status" Screen



DAU Home Identify Prioritize Analyze Focus Plan **Status** Show Export Logout

Status Engagement Actions

For each engagement action, use the drop-down menu to indicate the status of that action. Enter any relevant information in the Comment field. Select 'Submit Changes' when you are finished.

Submit Changes

Position	Desired Focus	Action Title	Success Criteria	Action Status	Comment
Contractor (OEM)	Apathetic	Realign	Stable design that accurately reflects using commands requirements.	On Target	
Maintenance Depot	Sponsor	Consult	Finalized transition plan with buy in from both parties.	Needs New Plan	OBE because of personnel changes at the depot.
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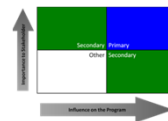
Plans for each stakeholder
 DEPO (Not selected / Needs New Plan) Consult

What: Increase commitment of electronics repair division to invest in planning transition.
How: Solicit feedback about resources and lead time needed to stand up capacity to overhaul components 1) Conduct orientation briefing with electronics repair division leadership. 2) Invite depot POC to participate in planning meetings with program PST. 3) Schedule site visit to contractor repair facility with depot POC.
Who: 1) Maintenance Team Chief 2) PSM 3) Maintenance Team Chief

Stakeholder Tactical Engagement Planning ("STEP") Software Tool



- ✓ **Identify** (Stakeholder Map)
- ✓ **Prioritize** (Power Grid)
- ✓ **Analyze** (Rating & REIs)
- ✓ **Focus** (Matrix)
- ✓ **Plan** (What, How, Who, When ...)
- ✓ **Status** (Relationship and Plan)



Where Can You Learn More & Practice?

- ❑ **Stakeholder Engagement Workshops (WSM 007):** 1.5 days
 Intact teams (program offices ...) build engagement plans
 - Leverages the STEP software tool. Details at catalog.dau.mil
 - Email steve.brown@dau.mil or (703) 805-4660 to schedule

- ❑ **Stakeholder Engagement Course (ACQ 452):** 2½ day
 classroom course for individuals offered at DAU campuses
 - Description and class schedule are online at catalog.dau.mil

- ❑ **Stakeholder Framework Online Module (CLM 052):** 3 hours

ACQ 452 Classes Scheduled in FY18

Class	Start Date	End Date	All Locations
002	3/27/2018 12:00:00 AM	3/29/2018 12:00:00 AM	KETTERING OH
001	3/27/2018 12:00:00 AM	3/29/2018 12:00:00 AM	FT BELVOIR VA
003	5/15/2018 12:00:00 AM	5/17/2018 12:00:00 AM	SAN DIEGO CA
004	5/22/2018 12:00:00 AM	5/24/2018 12:00:00 AM	WARNER ROBINS GA
005	6/12/2018 12:00:00 AM	6/14/2018 12:00:00 AM	CALIFORNIA MD
006	6/12/2018 12:00:00 AM	6/14/2018 12:00:00 AM	FT BELVOIR VA
007	7/31/2018 12:00:00 AM	8/2/2018 12:00:00 AM	HUNTSVILLE AL
008	8/28/2018 12:00:00 AM	8/30/2018 12:00:00 AM	LOS ANGELES CA

<http://catalog.dau.mil/onlinecatalog/coursedetails.aspx?crs=ACQ%20452>

