

Engaging Diverse Stakeholders to Lead Change – A Worksheet

If you are leading a change in your profession, field, or community, involving various stakeholders and understanding their perspective will be critical to your success. This worksheet can help you to:

- 1) think through the stakeholders who may be impacted by your change effort,*
- 2) prioritize those who are the most critical for you to engage,*
- 3) understand how they relate to, or will be affected by, your change, and*
- 4) plan tactics and engagement strategies.*

Recommended: discuss and complete this worksheet with a small group of people who are already involved in your change effort for best results.

What is your change/advocacy goal? List your goal here for ease of reference through the rest of this activity/worksheet

TIP: The best change/advocacy goals are SMART – Specific, Measurable, Attainable, Relevant, and Time-bound.

- 1) **IDENTIFY stakeholders.** First, brainstorm a list of potential “stakeholders” related to this change.

A stakeholder may be someone who can help you lead/influence the change (ex: a sponsor/funder, an allied organization), or be impacted or affected by the change—positively or negatively, directly or indirectly (ex: community members, staff, taxpayers, etc.).

Stakeholders include potential supporters, opponents, and those who are neutral in their stance. They also may include those whose position is unknown to you.

Use the following questions/prompts to help ensure you are thinking of all stakeholders, not just the obvious ones or those with whom you are used to working.

- *Who already supports your efforts toward the goal above?*
- *Who will benefit directly if you are successful? (ex: members, clients, students, residents of neighborhood X)*
- *Who may benefit indirectly if you are successful? (ex: parents, the city, small businesses, community colleges)*
- *Who already opposes your efforts toward the goal above?*
- *Who stands to lose or be at a disadvantage if you are successful, directly or indirectly?*
- *Who should be, but is NOT already at the table in your discussions/efforts? Who else holds a stake in this change?*

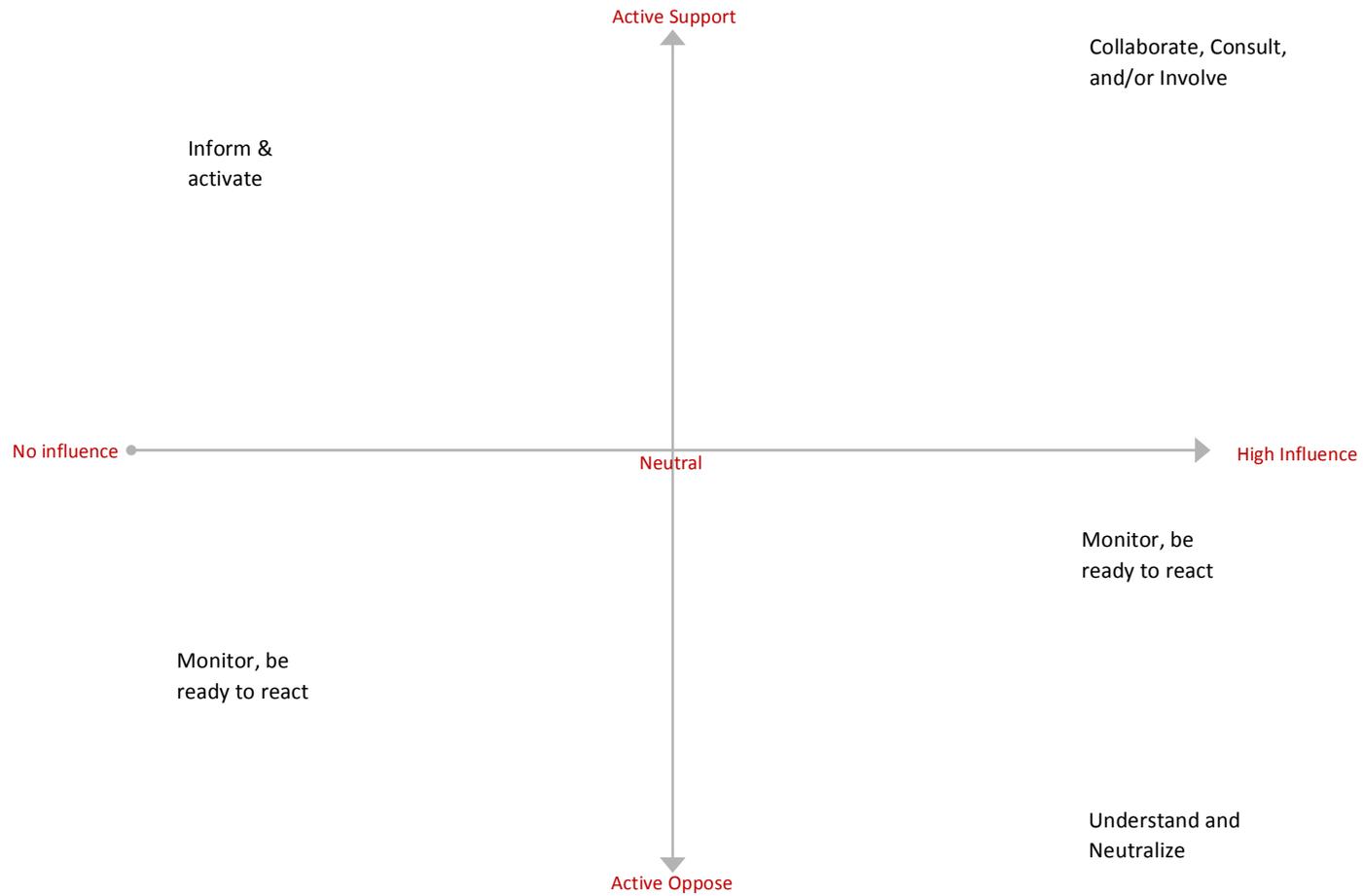
Capture them in Column 1 of the table on the next page.

- 2) **PRIORITIZE your stakeholders.** Often, we don't have time or resources to try to engage with all stakeholder groups. Once you have brainstormed your list of stakeholders, it will be important to consider how to focus your limited resources. *Revisit your list of stakeholders and complete the following steps:*
- Note your guess of their current position: *Actively Support, Passively Support, Neutral, Passively Oppose, Actively Opposed, Unknown.*
 - Consider how influential each stakeholder/group may be in supporting or opposing/blocking your change. Consider things like decision-making power, the number of people whom they may be able to influence, their access to resources, their newsworthiness, etc. Note whether you consider them to be: *Highly Influential, Moderately Influential, or Not Very Influential.*
 - Considering your stakeholders' positions and relative influence, star those you feel you ought to prioritize given your own resource constraints. (There is no magic number, but be realistic). Write them in the table on page 4. Remember: it is often just as important to prioritize influential opponents as it is influential supporters.

1) Stakeholder (individuals or groups)	2a) Position on change/issue	2b) How influential could they be (for or against you)?	2c) Priority?

TIP! *Revisit this prioritized list after you have completed Step 4 and have a more complete picture of their interests!*

- 3) **Consider high-level engagement objectives with stakeholders.** Plot your priority stakeholders on the matrix below to start to give you an idea for how you may need/want to engage them in your change efforts and discussions. This is just a high-level start; you will further refine your approach in Steps 4 and 5.



- 4) **UNDERSTAND your stakeholders.** Deepen your understanding of the priority stakeholders/stakeholder groups. Starting with your supporters/potential allies, use the table and questions below to consider:
- What could they gain or how could they benefit if your change efforts are successful? (Think about what matters to *them*).
 - What could they lose or what's at risk for them? Pay attention to perceived losses or risks as well; those are just as powerful as actual losses or risks, and you may need to account for them in your approach.
 - How well-informed are they already about your change? Do they already know a lot about the change you are trying to make? Is it based on fact, assumptions, misinformation? Understanding what they already know or don't know and what their information sources are will help you when we get to Step 5, Plan to Engage.
 - For supporters/potential allies, other important considerations may include:
 - Do they share your end goal, but perhaps see alternate paths to get there?*
 - Are they interested in working with you?*
 - Are they already taking steps toward this change? If so, what might they gain from partnership?*
 - Are there other benefits or drawbacks/complications to engaging this stakeholder that may impact your approach?*

	Priority Stakeholder (from 2c above)	4a) How might they benefit/gain if you succeed?	4b) What might they perceive to lose/risk, if you succeed?	4c) How well-informed?	4d) Other considerations?
SUPPORTERS					

Repeat this process for opponents. For opponents, additional considerations may include:

- Is there any common ground you can find based on their benefits or risks? Is it possible they agree with *portions* of your plan?
- Are they actively or passively opposing you? If it's passive, do you need to address it actively or just monitor it for change?
- What could win them over (if anything)? If nothing, how can you neutralize/diminish their opposition, especially if influential?

OPPONENTS	Priority Stakeholder (from 2c above)	4a) How may they benefit/gain if you succeed?	4b) What might they perceive to lose/risk, if you succeed?	4c) How well-informed?	4d) Other considerations?

After completing these tables to the best of your ability, ask yourself:

“What’s missing? What is based just on my assumptions? What additional information do I need to fully understand these stakeholders? How might I go about discovering it?”

TIP! Be sure to research and confirm your own assumptions above, using the Internet, informational-interviews, “word-of-mouth”, public meetings, social media, etc.

5) **PLAN TO APPROPRIATELY ENGAGE both allies and opponents.** Using the above information, consider how you can or should engage both allies and opponents in your change efforts. Customize your approach based on what you've discovered. Your goal is to maximize benefits and minimize risks for each stakeholder.

	Priority Stakeholder (from 2c above)	Engagement Objective (informed by matrix above)	Specific messages or engagement strategies you could use to achieve your engagement objective (consider both direct and indirect tactics)
SUPPORTERS/ALLIES			
OPPONENTS			

TIP! Remember to monitor & adjust your stakeholder list, priorities and approach over time, as it could change as you get further into your change effort and/or as the environment/context in which you are operating changes.