Stakeholder engagement planning

What's this about?

- **Opportunity**
- **Risk**

Internalizing this will pay dividends over and over

18F

When you leave this session, you'll be able to

create an engagement plan

18F

Engagement plans and Communication plans

18F

Engagement plans and Communication plans

are different

18F

A communication plan is tactical, and
drives engagement

18F

A engagement plan is strategic, and drives the vision

18F

An engagement plan is a larger, longer effort

18F

An **engagement plan** is a larger, longer effort **that spans the lifetime of the product**

18F

Vision

18F

Why we're here

The problem you're solving (or opportunity you're addressing) and why it's important.

Our impact

What, exactly, we're doing to make a difference. There are a lot of different ways to attack a problem—we have to pick one.

Measurement

Building products without a feedback loop is guesswork. Measurement and metrics help us make sure that our solutions are having the impact that we want.

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What's our Vision?

In plain language, what is Open Forest's Vision?

Big picture

18F

strategy is about the forest, not the trees

Vision, strategy, and tactics

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Creating the product strategy

Vision, strategy, and tactics

1 **Vision**

The aspiration, the idea; the change you want to see through

2 **Strategy**

The plan to achieve that aspiration

3 **Tactics**

The steps to implement this plan

Roadmapping and agile

Product roadmaps are a powerful strategic tool to show your plan.

Product roadmaps are a powerful strategic tool to show your plan.

They help you keep track of the big picture and correlate every work item to your end goal and your vision.

Product roadmaps are a powerful strategic tool. They help you keep track of the big picture and correlate every work item to your end goal and your vision. **They also help you stay aligned with your stakeholders.**

You shouldn't use roadmaps to forecast exactly *what* will get delivered *when*.
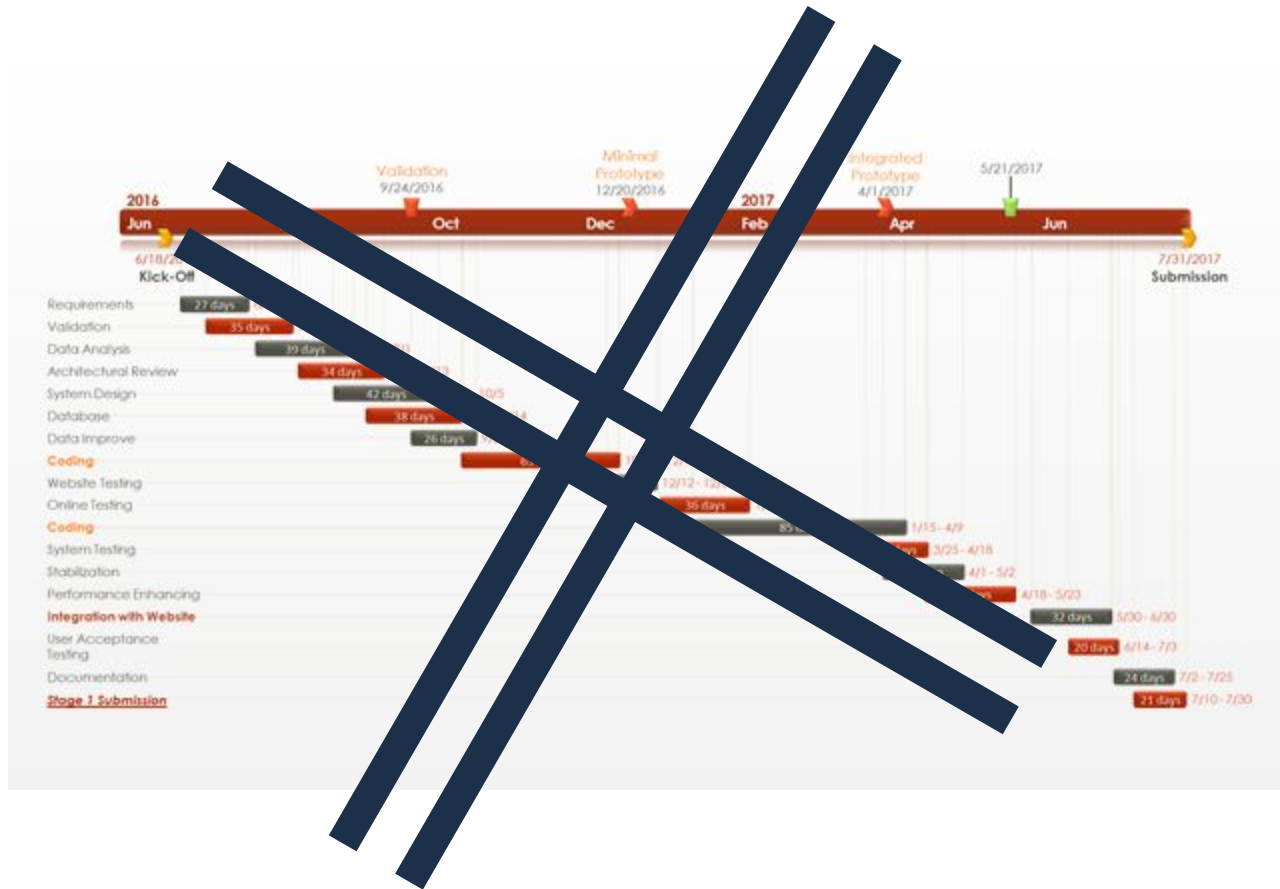
You shouldn't use roadmaps to forecast exactly *what* will get delivered *when*. **They're for planning the order you'll tackle the various pieces of the overarching problem.**
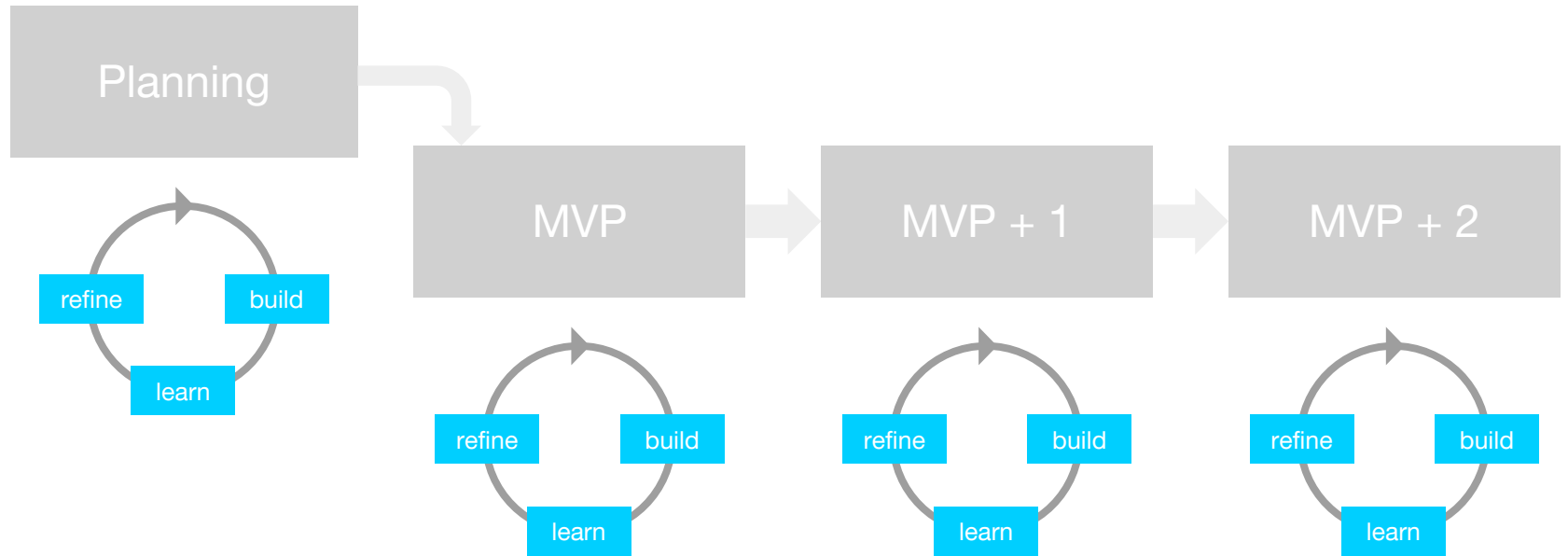
Roadmaps *are* a snapshot of current thinking: how we'll make the vision real.

Not a locked-in promise.
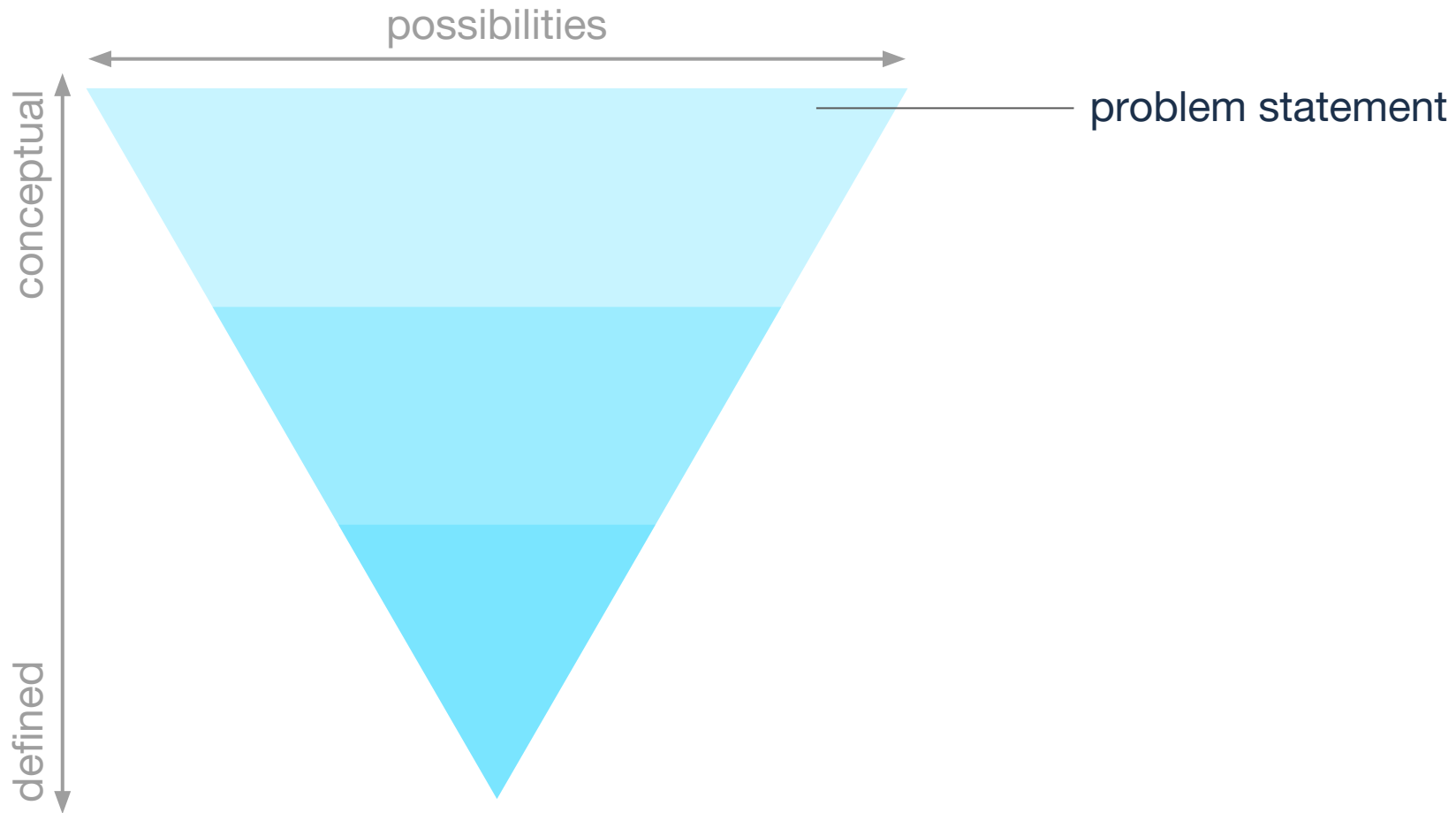
What does **planning** mean in today's world?
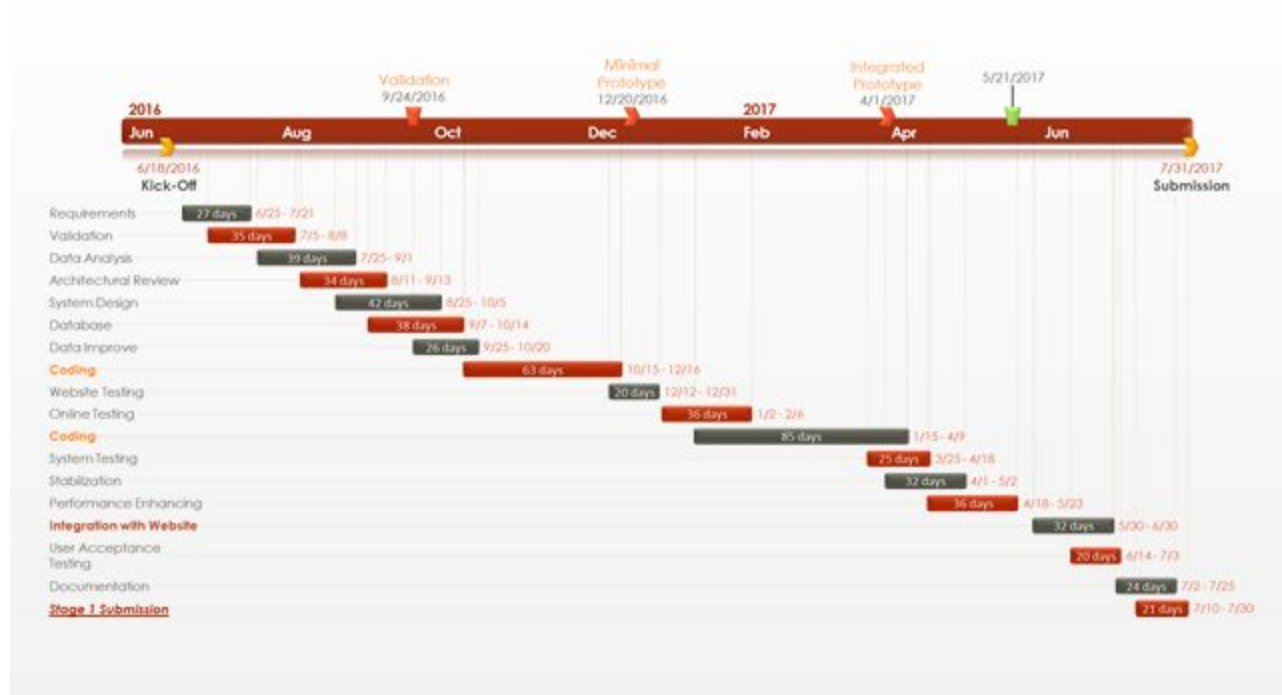
The spectrum of work

All of the work of building a product lives on a spectrum — you need open-ended conceptual work just as much as clearly-defined execution tasks.

possibilities

conceptual

defined

problem statement

discussion

customer promises

Let's categorize:

user stories

product vision

backlog

product roadmap

possibilities

conceptual

defined

user stories
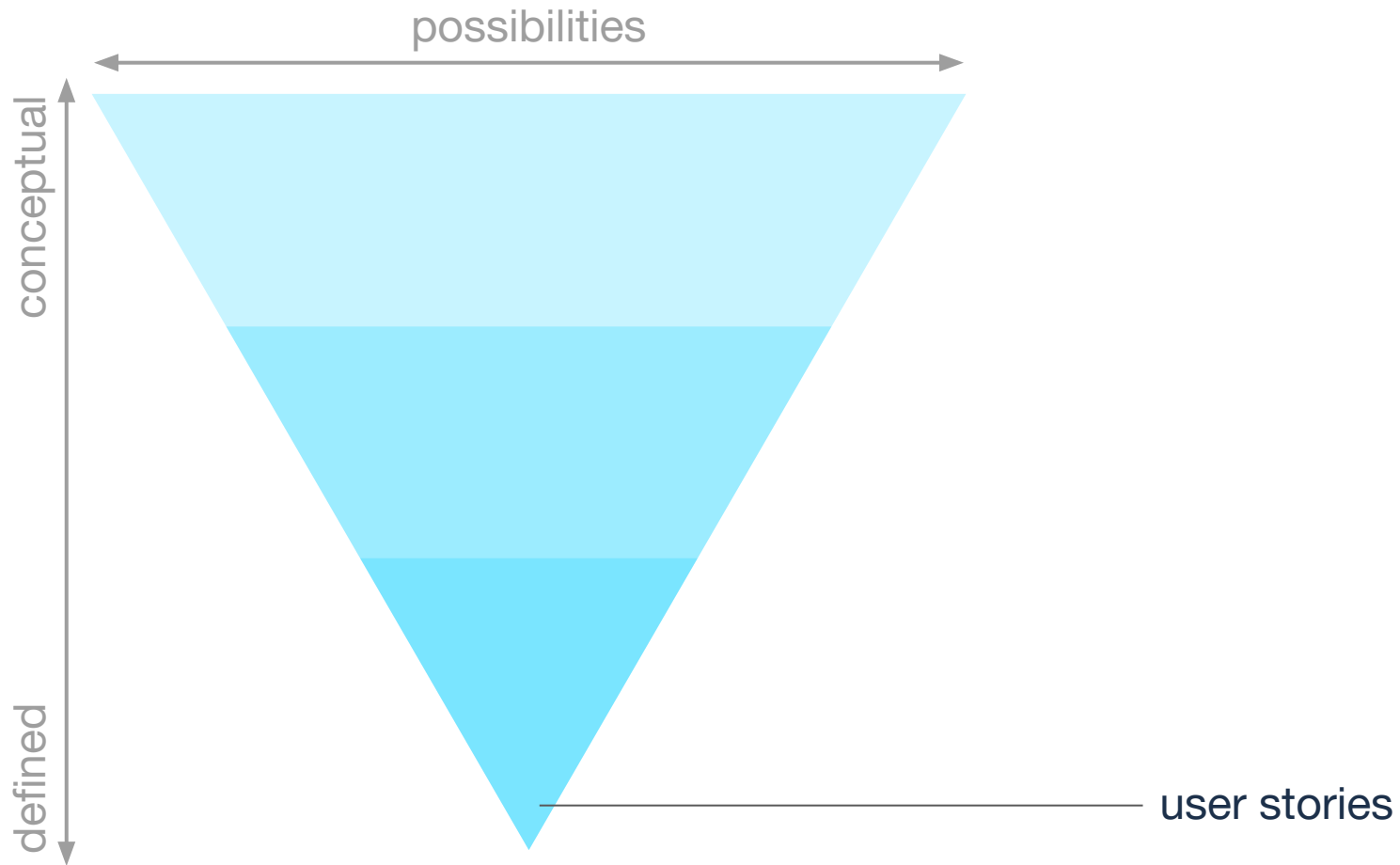
The roadmap is a bridge between your strategic vision and your backlog of work.

product vision

customer promises

product roadmap

backlog

user stories
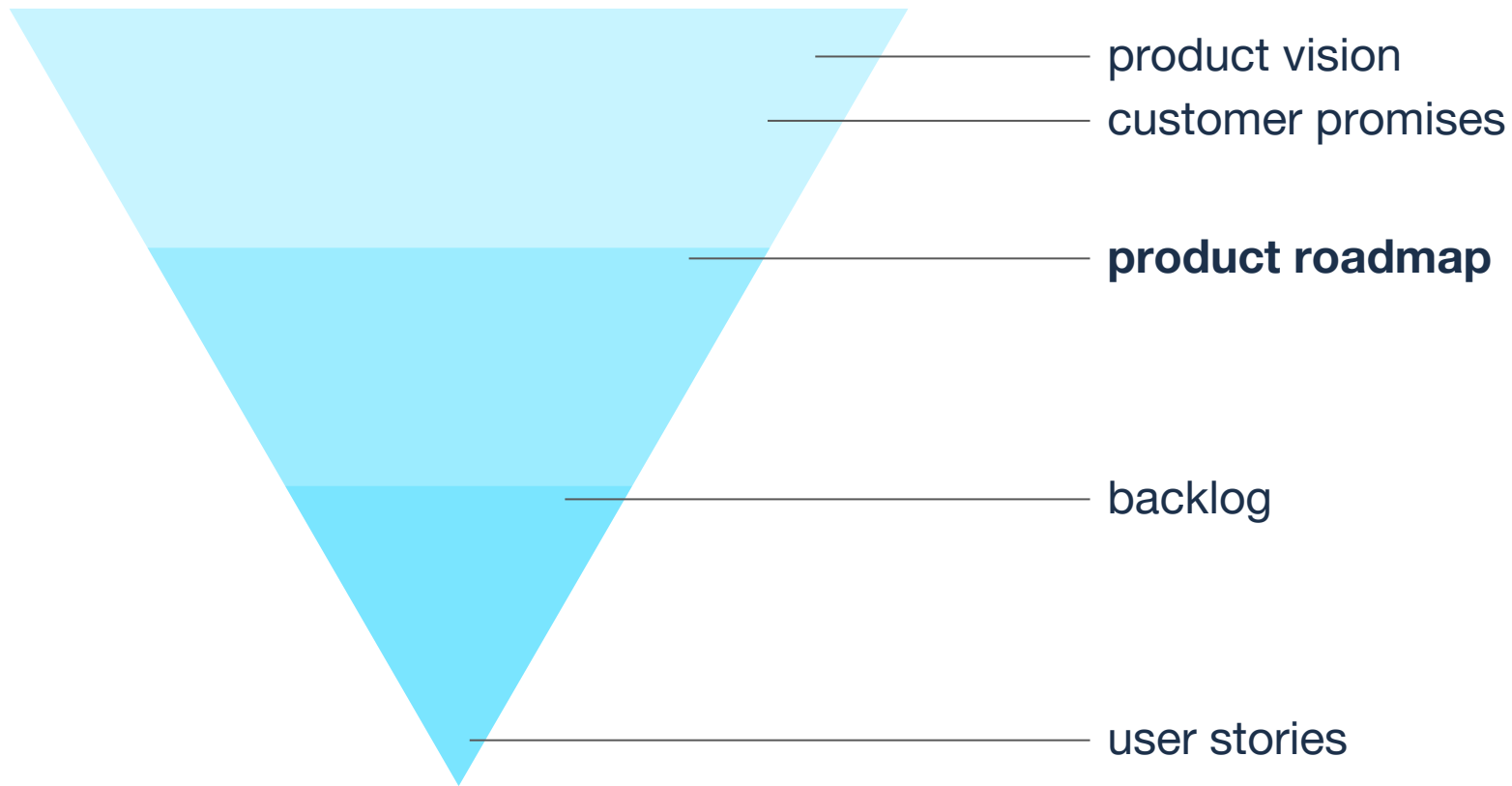
Broadcasting your product narrative

Once you have a narrative for your product, you have to share it. But what's the right way to do that?

Bringing stakeholders along

Working with stakeholders provides:

- **Support**
- **Advocacy**
- **Air cover**
- **User adoption**
- **Modes for more internal communication**
- **Participation in iteration cycles**

Winning support isn't a one-time process; you must constantly work to keep sponsors, supporters and those impacted by your product bought in.

And in an incredibly valuable way, those who will use the product — both the public and front-liners — can provide input.

And in an incredibly valuable way, those who will use the product — both the public and front-liners — can provide input. **Plus stakeholders often know why something is the way it is (and in what ways it can best change).**

One of the most important ways to keep them involved is to let them see how the project is going.*

One of the most important ways to keep them involved is to let them see how the project is going.*

*Due to governance, this isn't optional. But we can be more agile than governance usually infers.

It can be uncomfortable to let people see the rough edges of your project as you build...

It can be uncomfortable to let people
see the rough edges of your project
as you build...

**but they can't help you if they don't
know what's happening.**

And when your plan changes (and it will!) you want to show that changing direction is a positive thing

And when your plan changes (and it will!) you want to show that changing direction is a positive thing **because it will help everyone get what they want.**

Who are we talking about?

How do each of these stakeholder groups help engage others?

- Agency leadership
- Legislators
- Adjacent agencies
- Oversight bodies
- Unrelated agencies
- Educators

- Local outdoorspeople
- Outfitters
- Christmas tree customers
- Local press
- National press
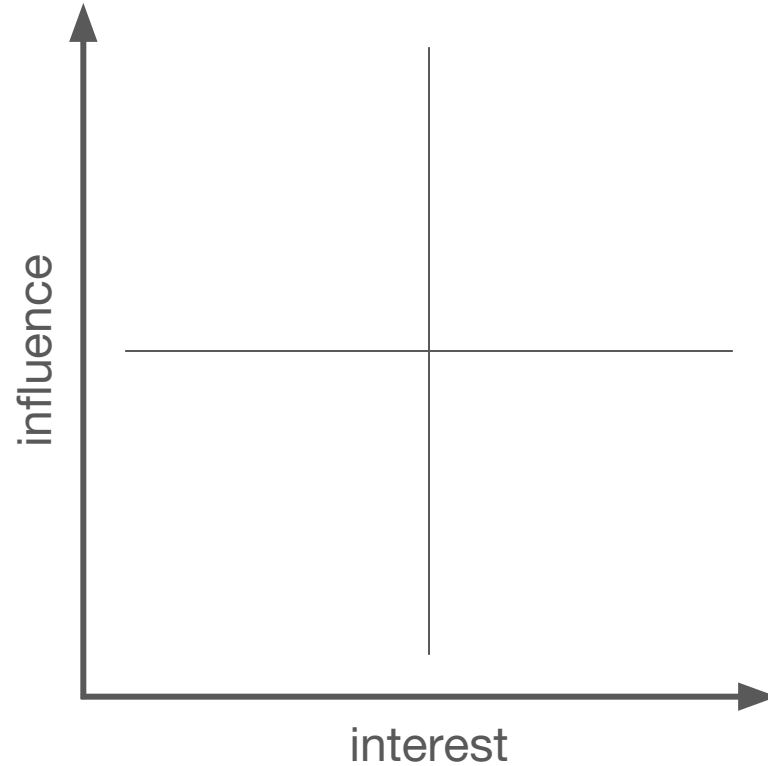
Prioritizing your audiences

How you talk about your product, and what parts of the product you talk about, depends on who you're talking to.
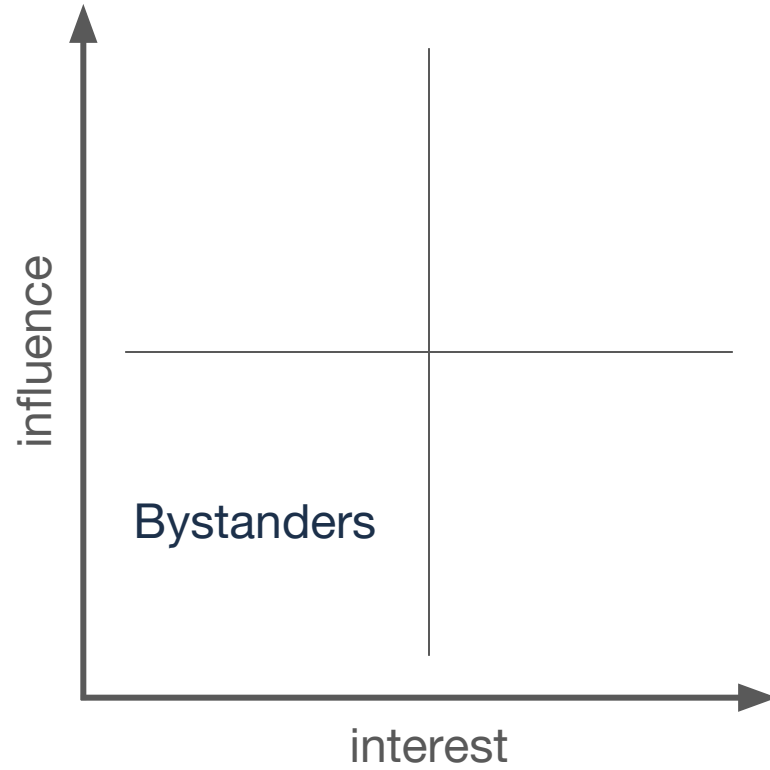
How you talk about your product, and what parts of the product you talk about, depends on who you're talking to. **That's easy when they're standing right in front of you… but they usually aren't.**
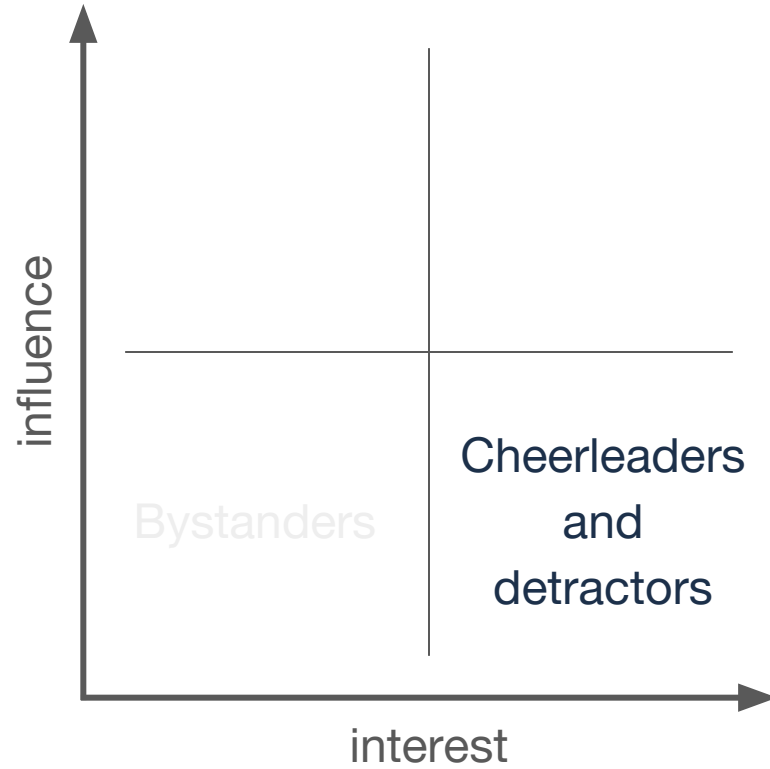
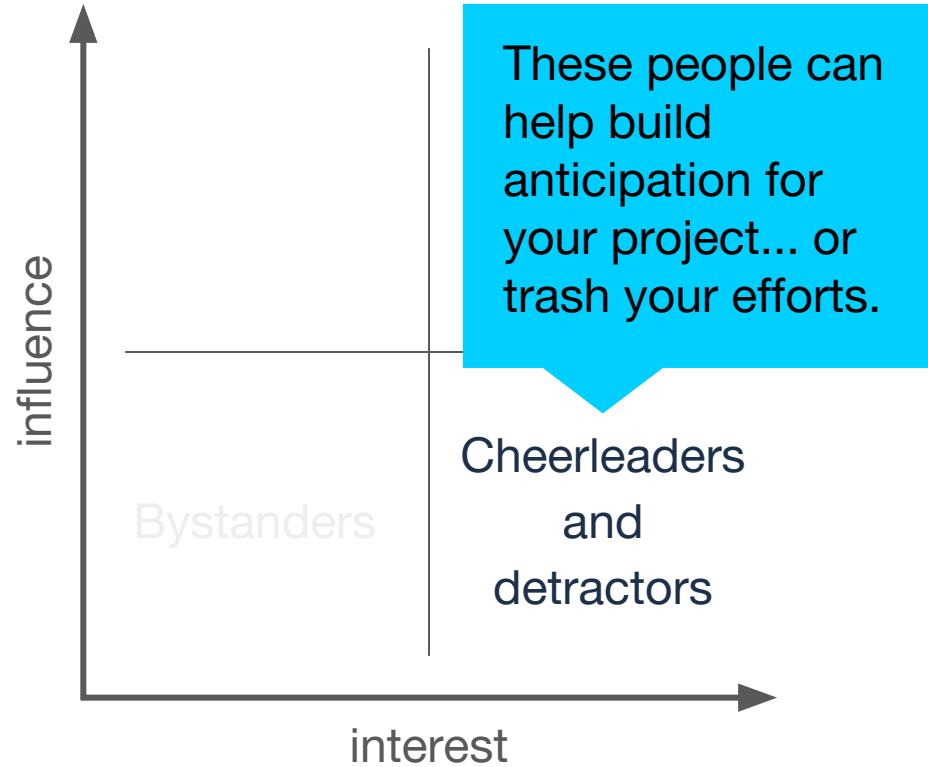So, you have to figure out who your core audience is.

It helps to map out everyone who might belong to that group.

Look at who has **influence**.

influence / interest (axes of a quadrant chart)

influence

interest

Bystanders

influence

interest

Bystanders

Cheerleaders
and
detractors

Approvers and deniers

Critical decision makers

Cheerleaders and detractors

Bystanders

influence

interest

Approvers and deniers

Critical decision makers
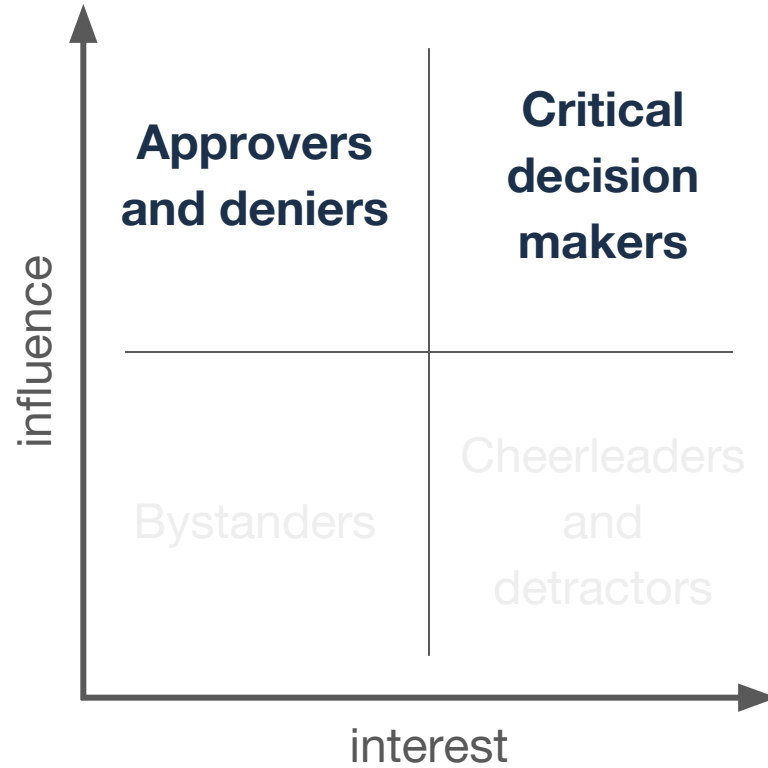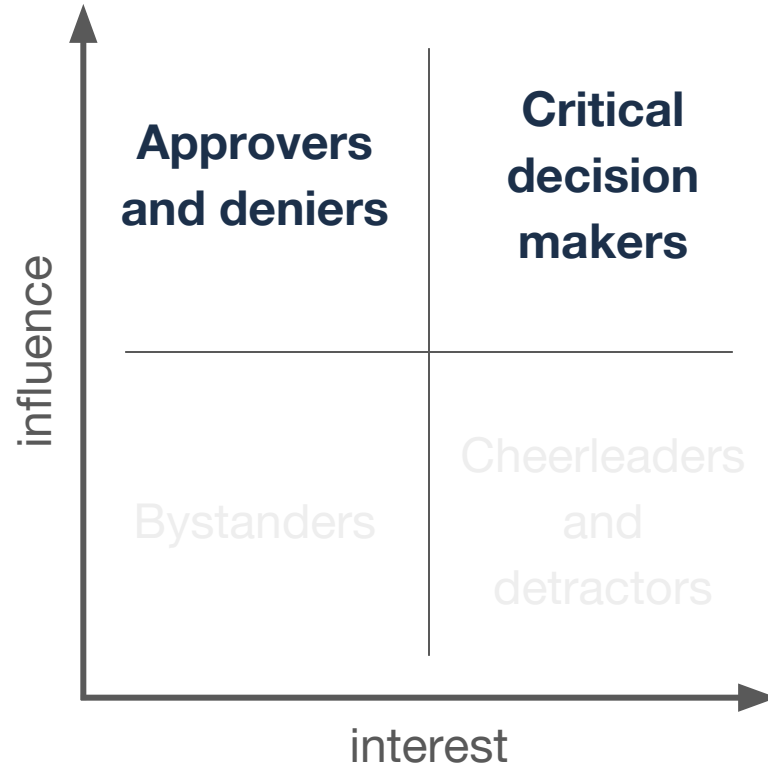
You **need** these folks to buy in.

influence

Bystanders

Cheerleaders and detractors

interest

And share accordingly:

A 2×2 matrix with axes "influence" (vertical) and "interest" (horizontal):

- Top-left: **Proactive summaries with data**
- Top-right: **Proactive detailed information**
- Bottom-left: Sound bites
- Bottom-right: Easily digestible, repeatable stories
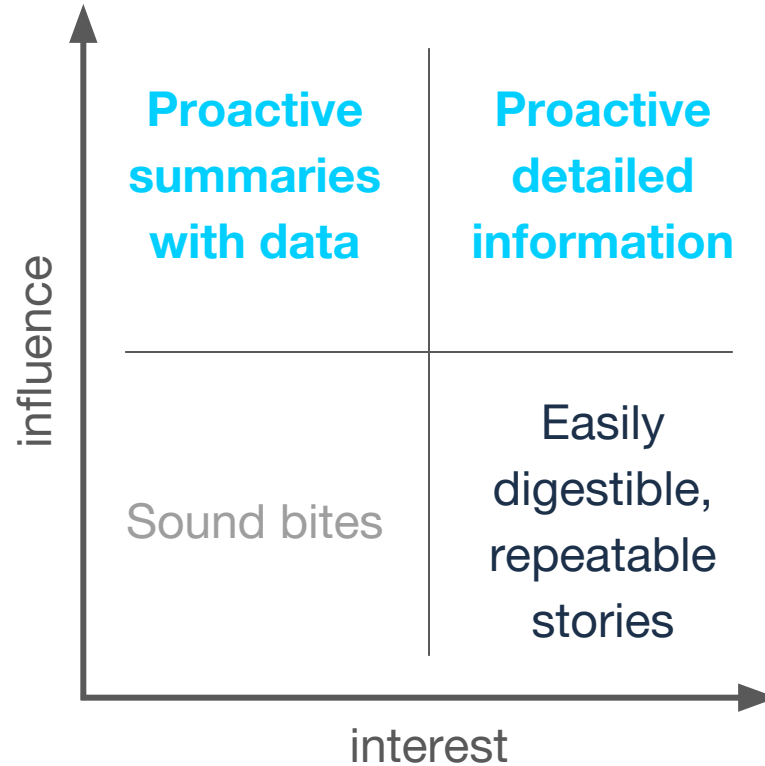
It's also helpful to look at availability.

Bystanders

Bystanders

availability

interest

availability

Bystanders

Bystanders

The
Grapevine

interest

availability

interest

Bystanders

Bystanders

The Grapevine
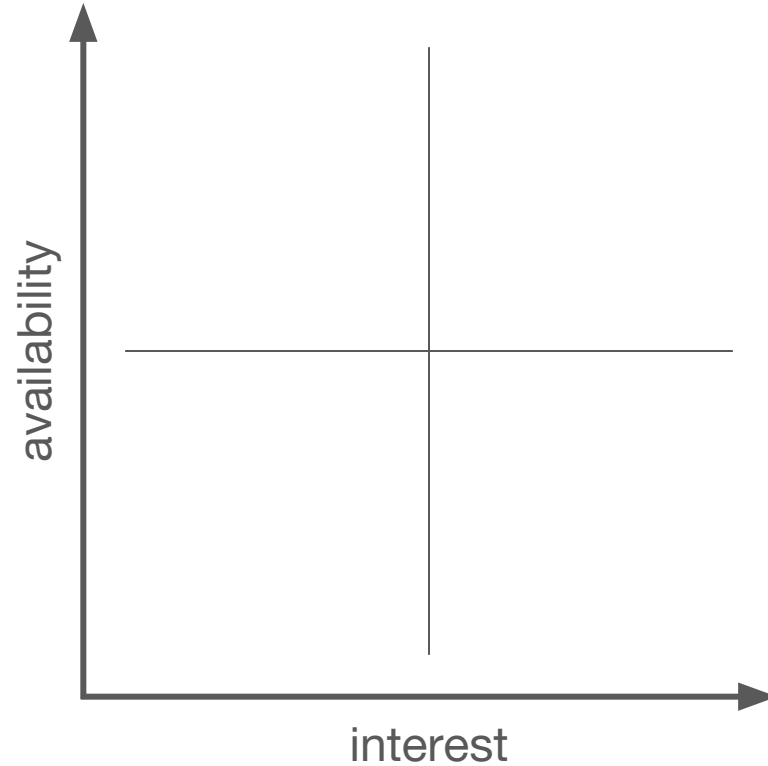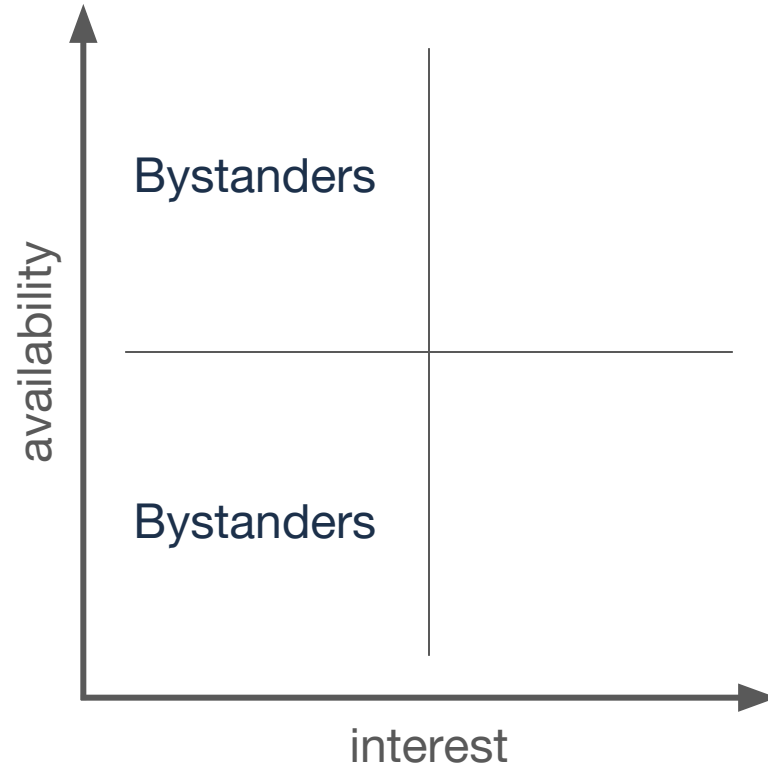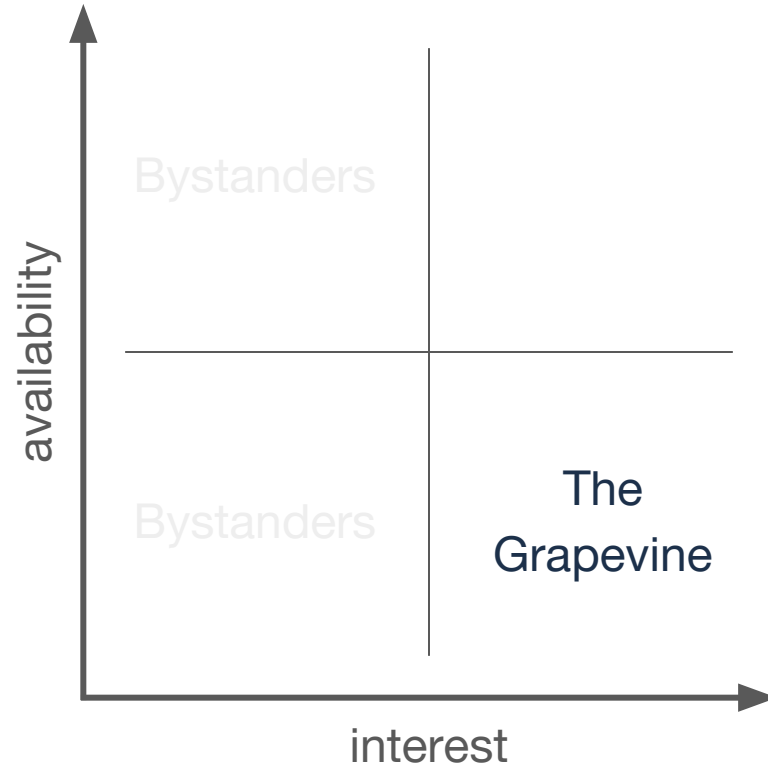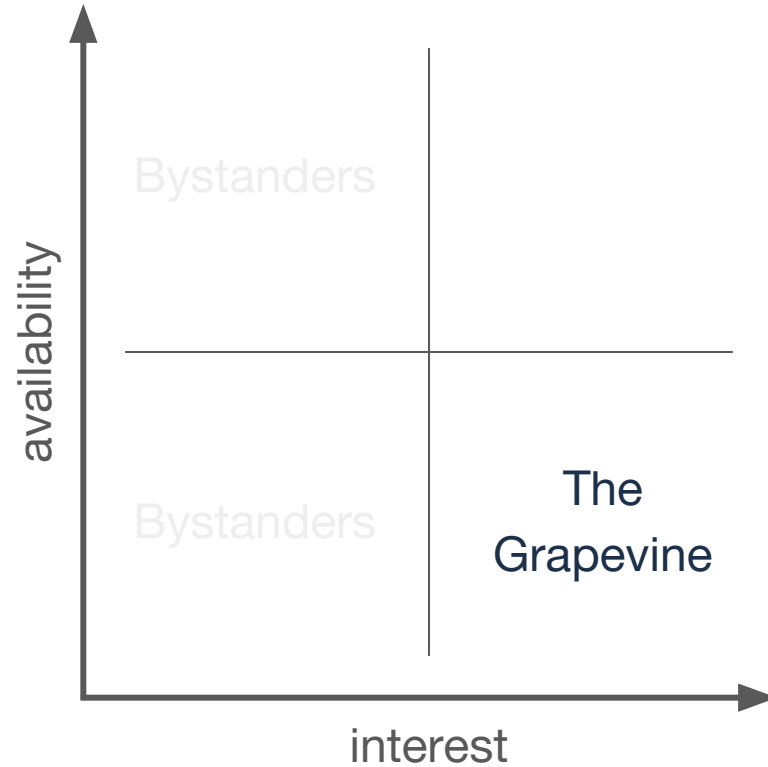
These people care, but don't have time to find (or scrutinize) information about your project.

availability

interest

Bystanders

Allies (and enemies)

Bystanders

The Grapevine
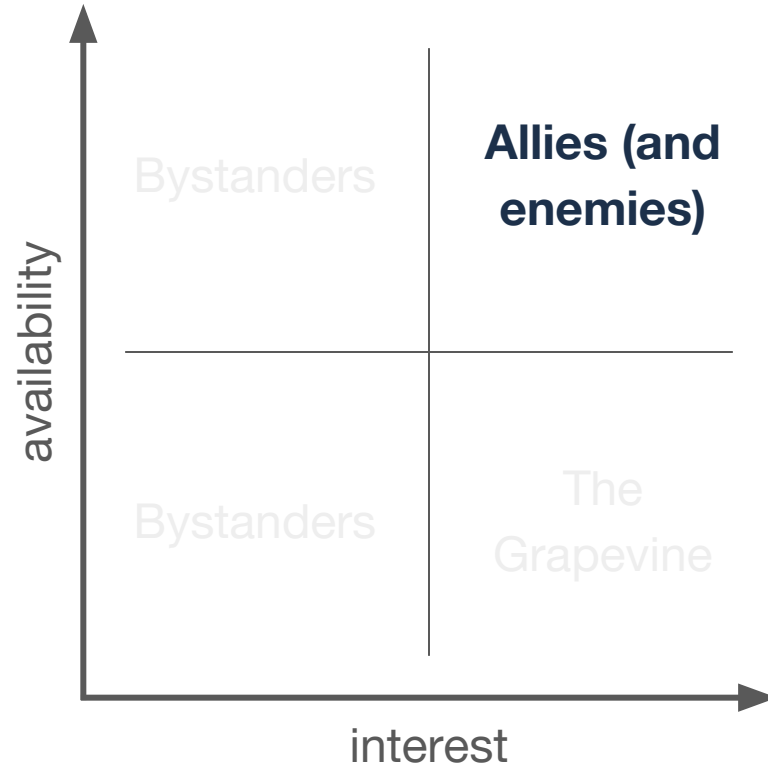
These folks have the bandwidth to really help (or hurt) you.

How?
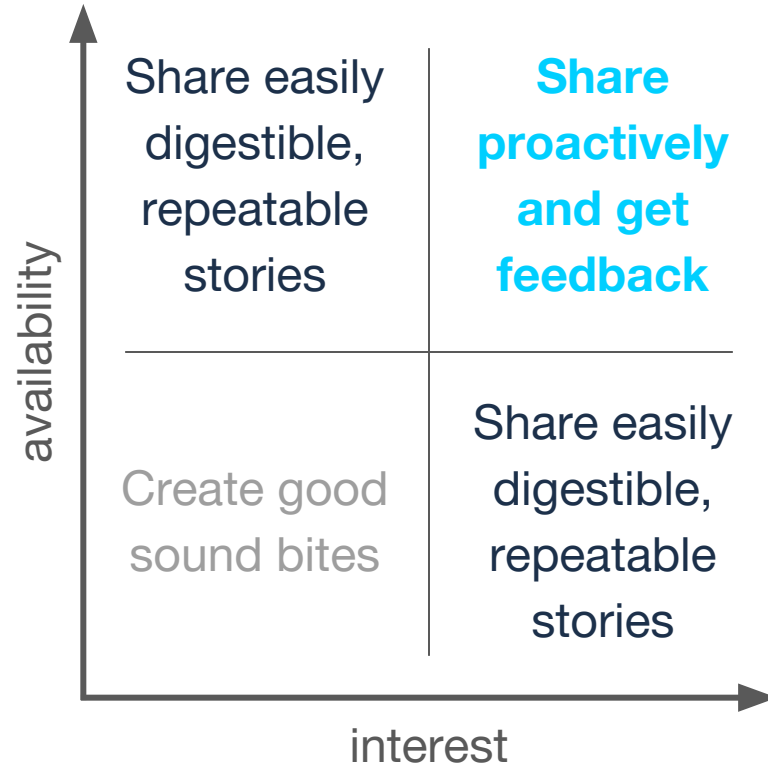
Standard approach:

Our human-centered approach:

How?

Standard approach:

Public needs | Front line needs | Manager goals

Our human-centered approach:

Public needs | Front line needs | Manager goals
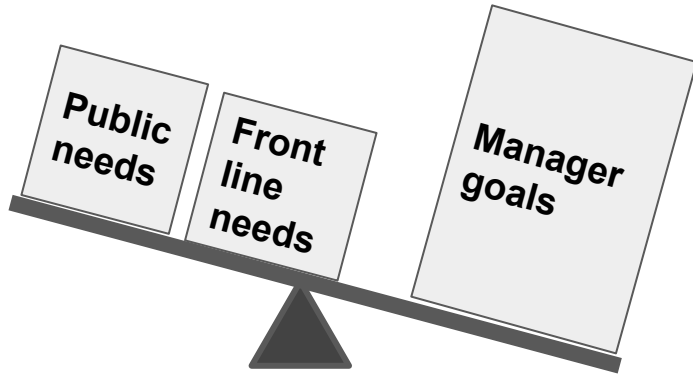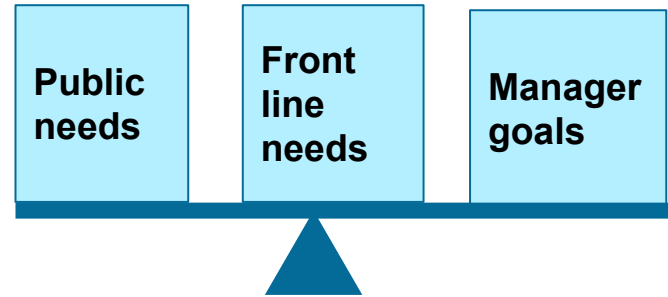
Where are forest-level staff?

influence

interest

Where are public users?

influence (vertical axis)
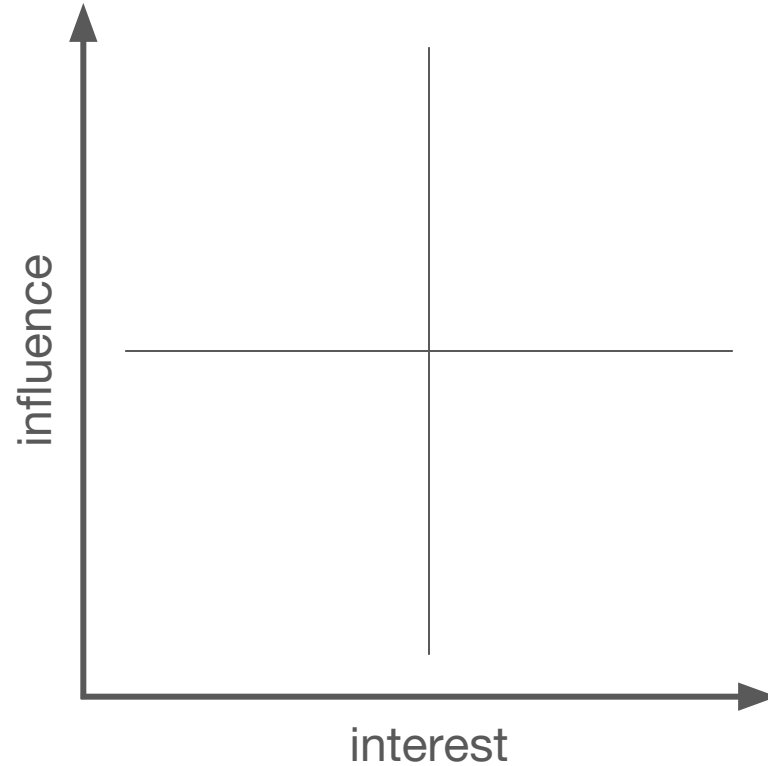
interest (horizontal axis)
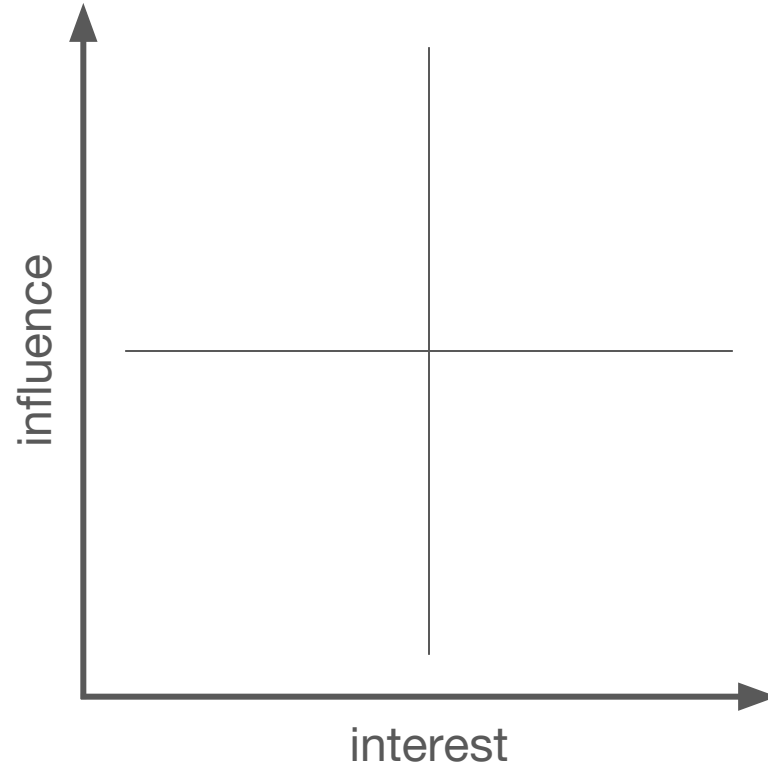
Who's your audience?

Identify the decision makers, the advisors and the influencers, then ask:

Of these, who are your allies? Who's still a little skeptical?

How might you bring detractors around proactively? Does that also help with bystanders?

What would these audiences consider a big win? Does your product help them solve any of their current problems?

Map the priorities: who to contact for what outcome. What follows with each action?

How your audience perceives you

The exact same phrase in a press release and on your website gets read (at least) two different ways.

The medium shapes the message.

Each communication channel has a different tone and inferred level of formality.

**

Some examples: the main website, public code repositories, project social media accounts, local paper thinkpieces, printed artifacts, team members' GitHub accounts...

demo video

formality

press release

formality →

testimony

formality

You also have a different amount of **control** over each communication channel.

Some channels you own. Others you can only distantly influence.

project website

control

agency website

control

newspaper article

control

end user word of mouth

control

Efficient, effective communication

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You are pitching every single time you interact with someone who influences:

You are pitching every single time you interact with someone who influences:

- **budget**
- **headcount**
- **user adoption**
- **opportunities for internal communication**
- **and so on**

useful data
clear requests
+ smart framing
_____

the right message

useful data

clear requests

Share info that they can use.

- **statistics**
- **anecdotes**
- **risks**
- **timelines**
- **instructions**
- **walkthroughs / demos**
- **one-pagers**

useful data

clear requests

smart framing

Tell them what you need them to do.

Know what you want from them.

- feedback?
- resources?
- buy-in?
- air cover?
- organizational support?

useful data

clear requests

+ **smart framing**

Tell them in a way they'll understand.

Your audience has to believe that the problem you're solving is worthwhile.

Your audience has to believe that the problem you're solving is worthwhile. **You also have to convince them that your solution to that problem is noteworthy.**

A compelling problem is necessary but not sufficient. You also need a compelling solution.

Why should anyone care about what you're trying to do?

What's our frame?

In plain language, why should anyone care about Open Forest?

More granularly, as an example:
Why should front-liners care about selling Christmas Trees online?

Communicating progress

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User research is progress. Design sketching is progress. Prototypes are progress. Infrastructure is progress. Hiring is progress.

Anything that gets you closer to your goal is progress.

It's up to you to explain **why**.

The right pieces of the story

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Everyone you talk to cares about a different part of the project.

Everyone you talk to cares about a different part of the project. **You need to lead with what *they* care about.**

Everyone you talk to cares about a different part of the project. You need to lead with what *they* care about. **You also have to make sure that all the pieces line up.**

Why Open Forest uses the US Web Design System (by audience)

1

Program Managers

Leverage shared services

Reduce budget/time spend on visual designers

Minimize accessibility audits

2

Members of the public

Friendly layout

Easy to read

Looks like a real government website

3

Project Team

Shared vocabulary/resources

Speed

It's all the same story.

Practice

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What do we elevate?

Which part of the story would appeal to the Secretary of Agriculture?

Outdoors-lovers?

Choosing your medium

Every communication channel lends itself to certain kinds of content. And you can map out how interactive that content is.

interactive

non-interactive

fixed ←——————————————————————→ changes often

More engaging, but also more overhead.

←————————————————————————————→

fixed   changes often

In general, dynamic content is more engaging for your audience. It's also more work to create.

The hard part is balancing effort and payoff. Effort spent on telling your story is effort not being spent directly building your product — so make it count!

Practice

The example we'll go through here is a generic project, but let's fill in each step with your details. This one has
three main target audiences:

* legislative bodies
* internal leadership
* the end users you're building for
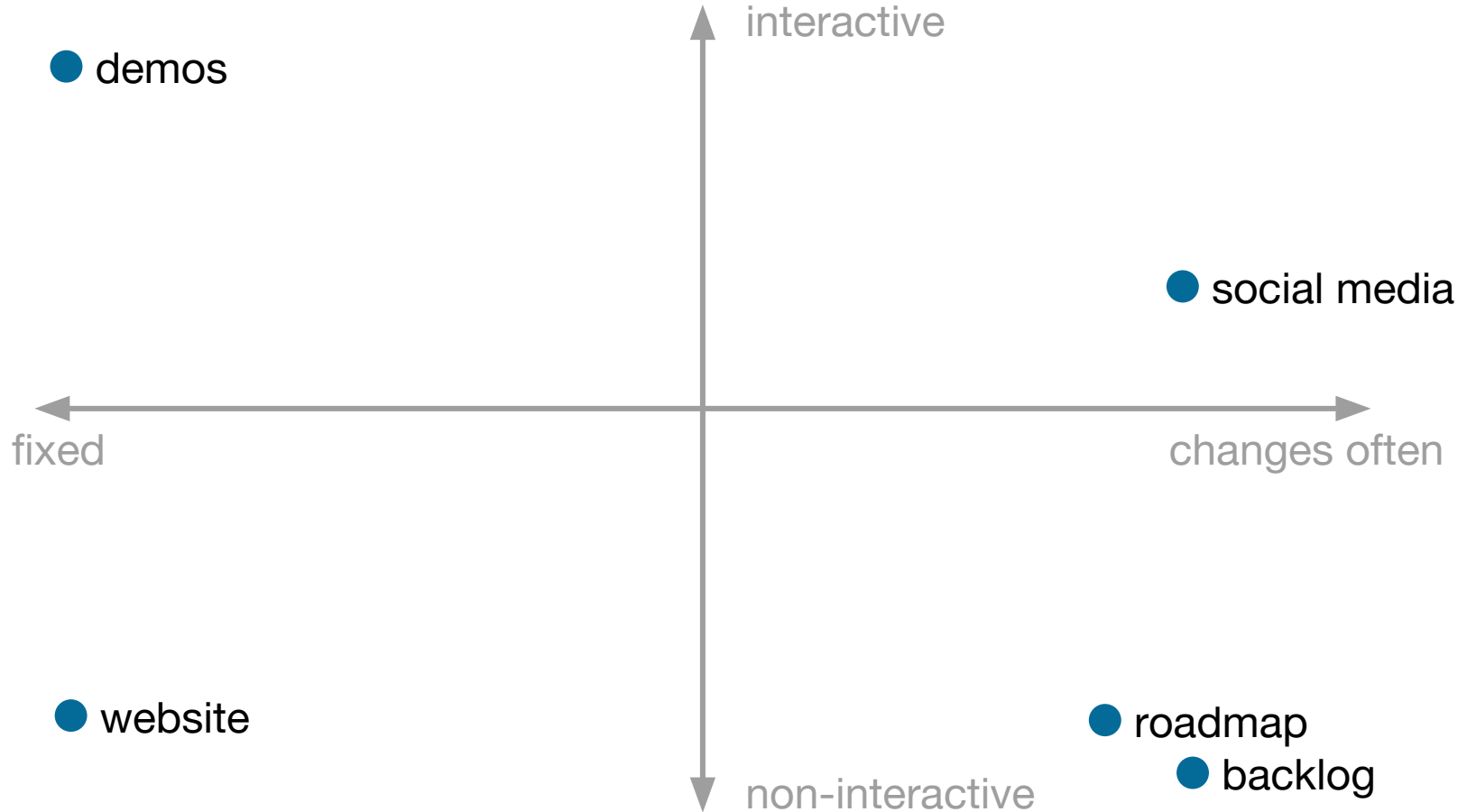
And some secondary audiences:

* internal oversight
* other teams on the project
* the general public

You have a few basic communication channels by default: your project roadmap, your project backlog, and periodic demos.

And you can easily add a traditional web presence, like a project website and some social media (maybe a Twitter account or YouTube demo).

Project comms channels

interactive

● demos

● social media

fixed ←————————————————→ changes often

● website

● roadmap

● backlog

non-interactive

Which of these channels will analysts (who influence legislators) going to find useful? What do they want to learn through those channels?

For legislators

interactive

● demos

● social media

fixed ←——————————————————→ changes often

● website

● roadmap
● backlog

non-interactive

For legislators

interactive

● demos

● social media

fixed   changes often

● website   ● roadmap

non-interactive   ● backlog
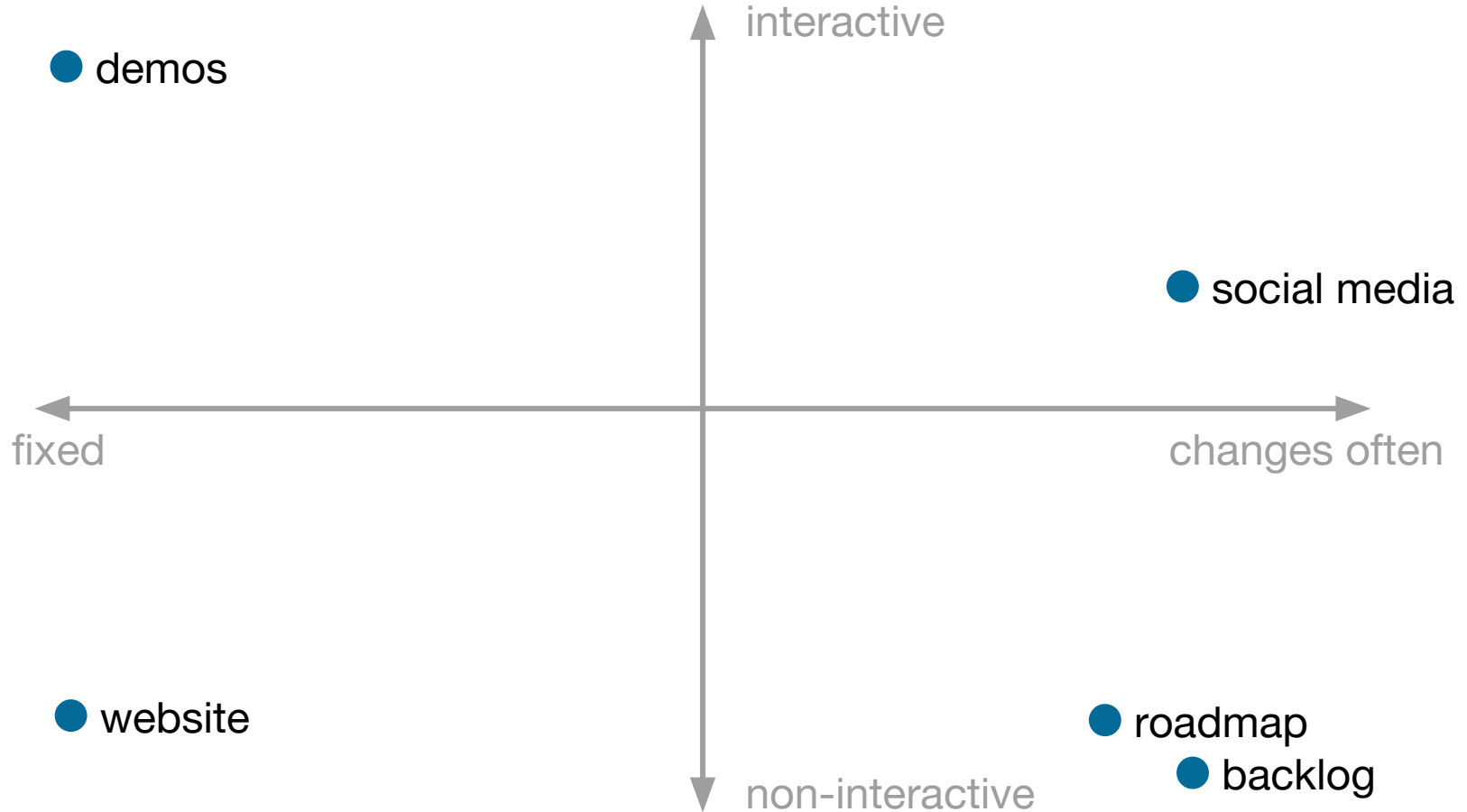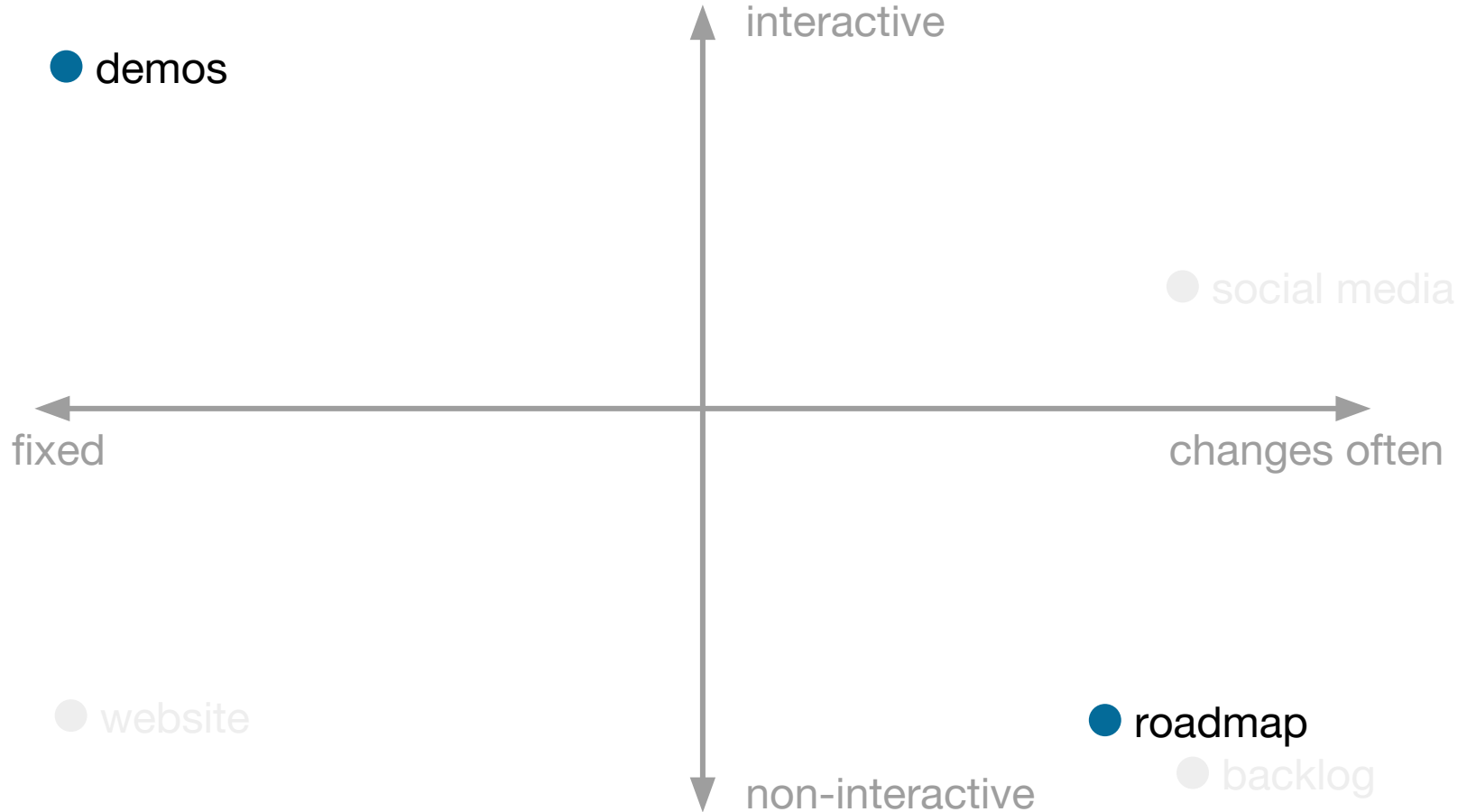
What about your internal leadership team? What will they pay attention to? What do they need to know?
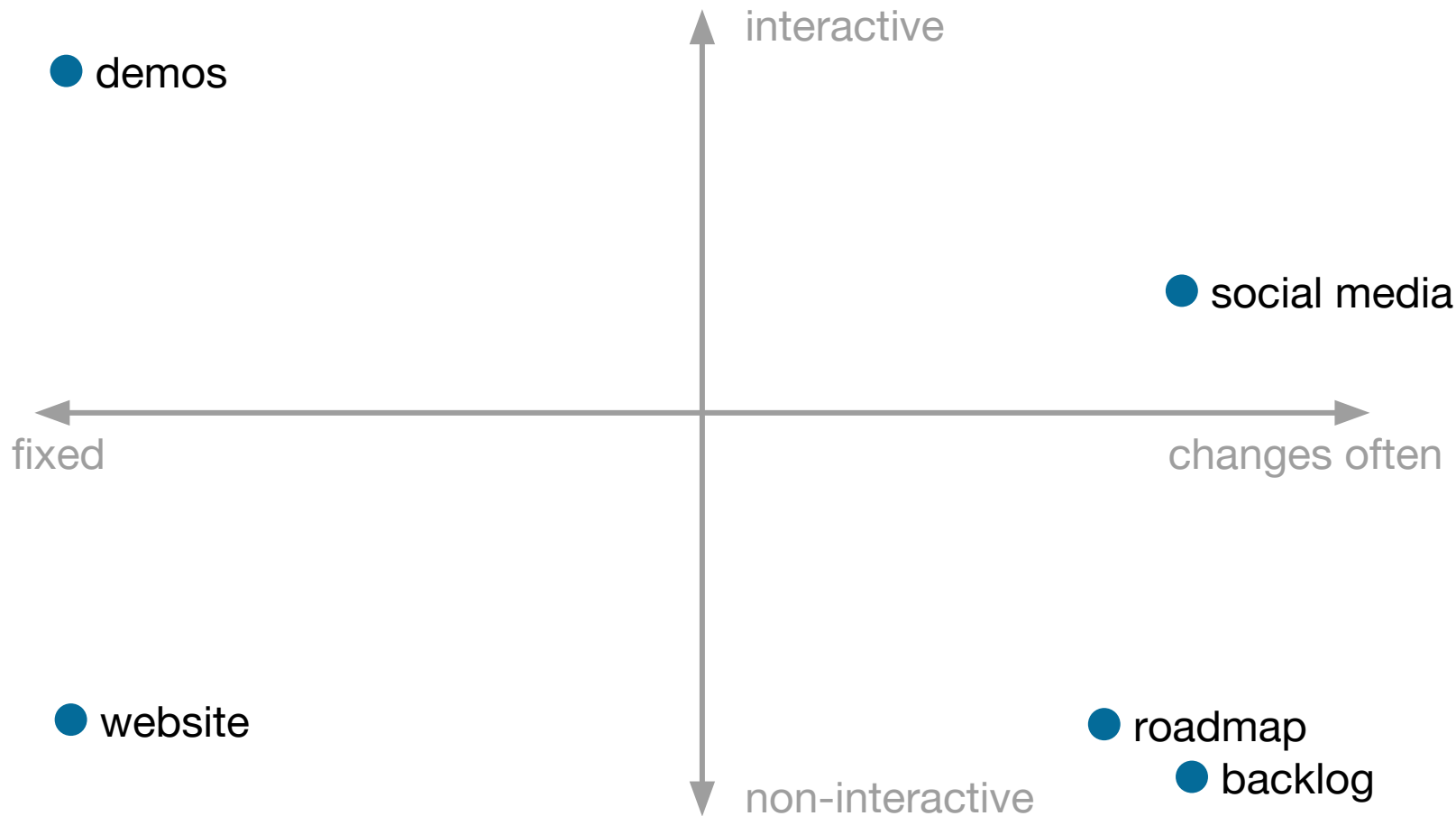
For internal leadership

- demos

interactive

- social media

fixed — changes often

- website

- roadmap
- backlog

non-interactive

For internal leadership

interactive

● demos

● social media

fixed ←→ changes often

● website

non-interactive

● roadmap
● backlog
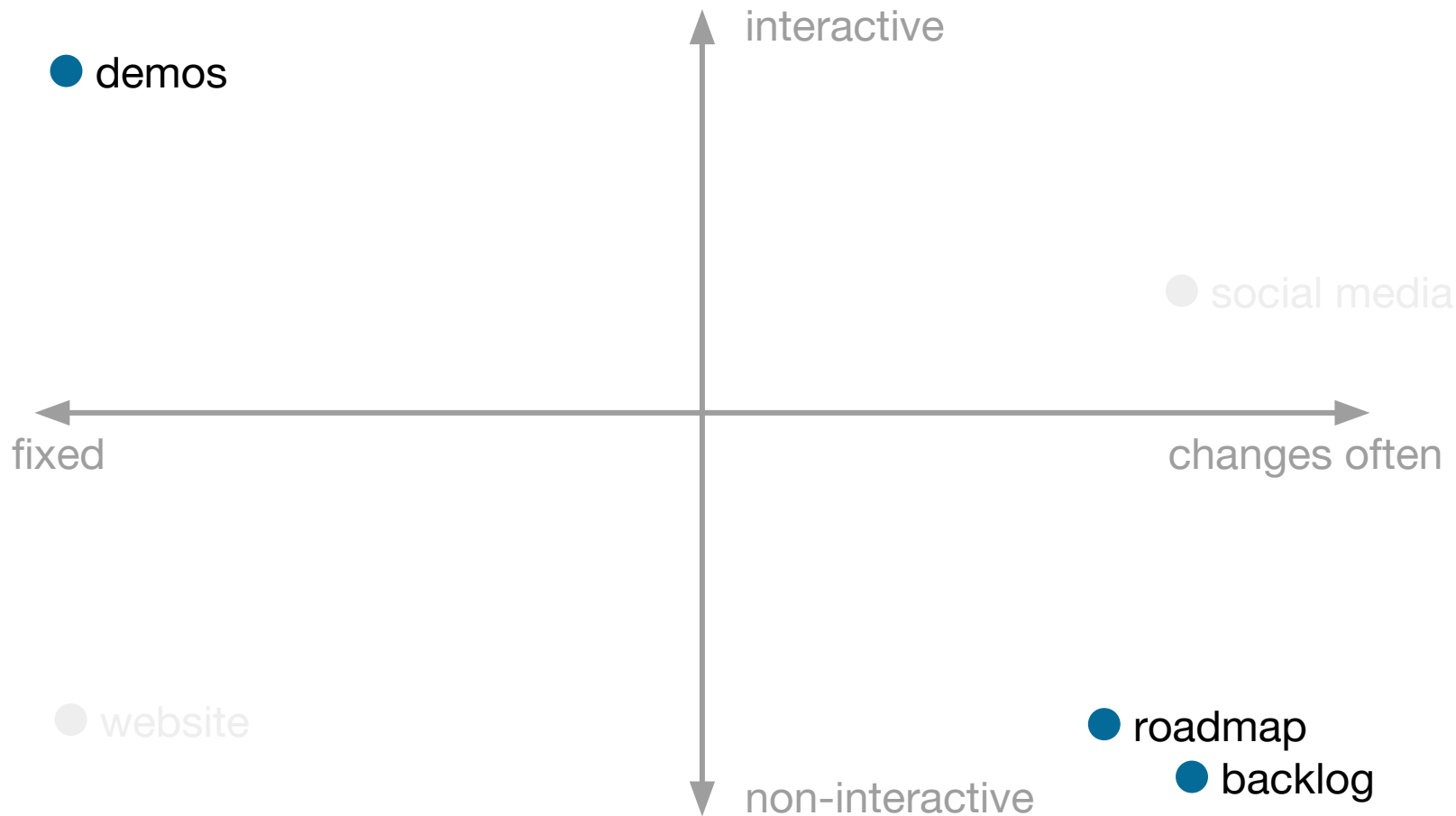
How about your end users? What are they likely to look at? What do they need to know?

For end users

interactive

● demos

● social media

fixed ← → changes often

● website

● roadmap

● backlog

non-interactive

For end users

interactive

● demos

● social media

fixed ⟷ changes often

● website

● roadmap

● backlog

non-interactive
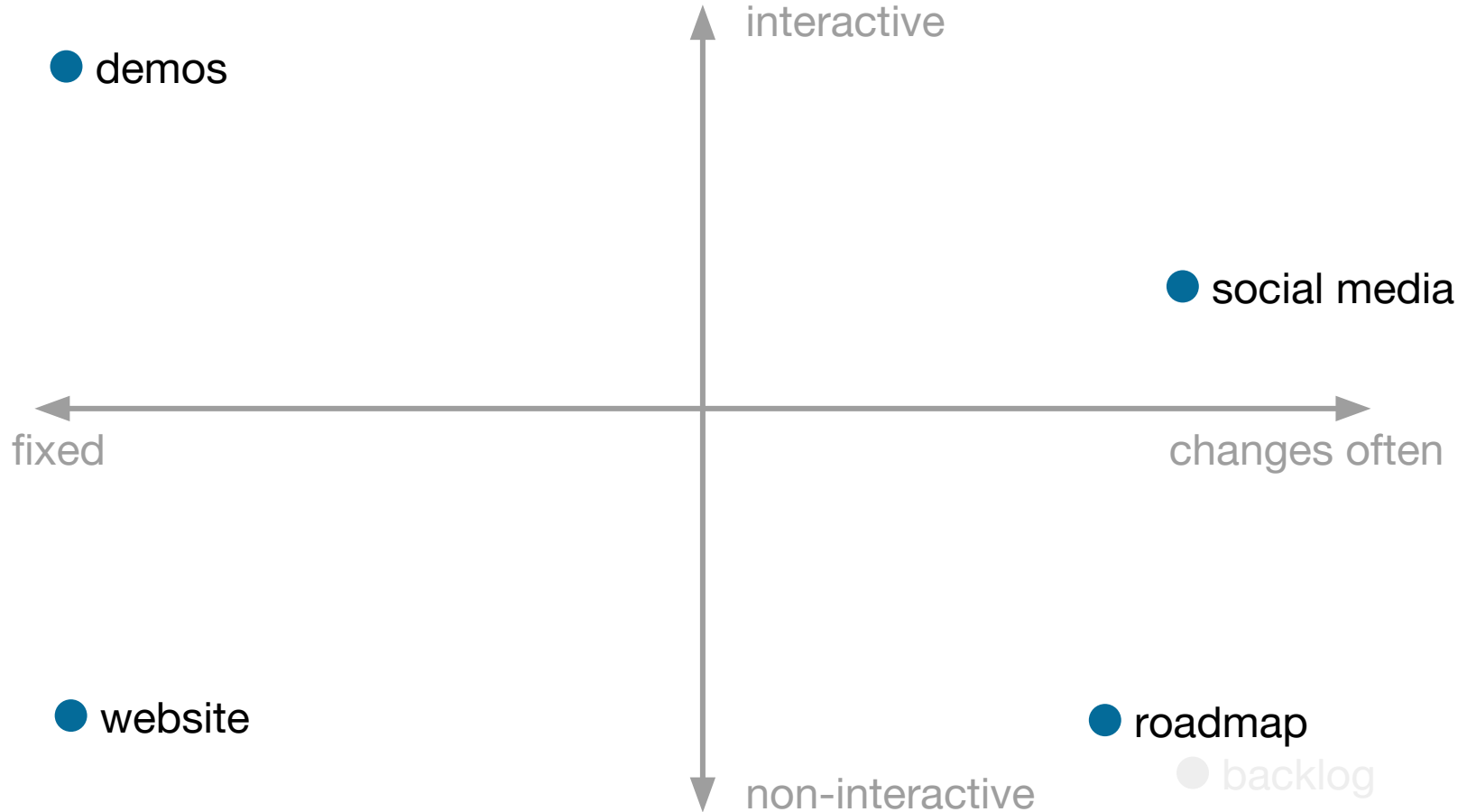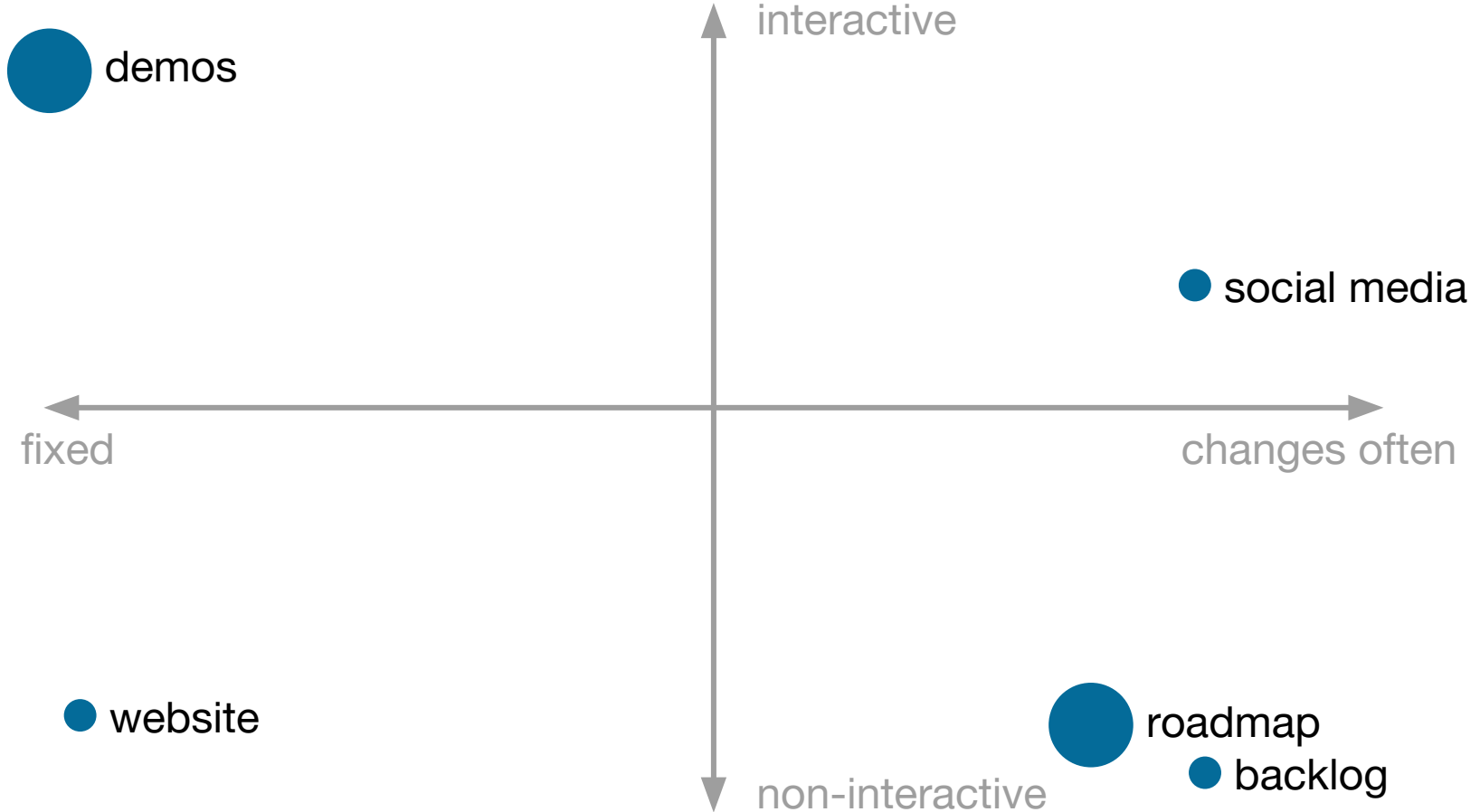
Where can we double down on specific channels to reduce overhead?

Audiences reached

interactive

demos

social media

fixed   changes often

website

roadmap

backlog

non-interactive

High-value channels

interactive

● demos

● social media

fixed   changes often

● website   ● roadmap

● backlog

non-interactive
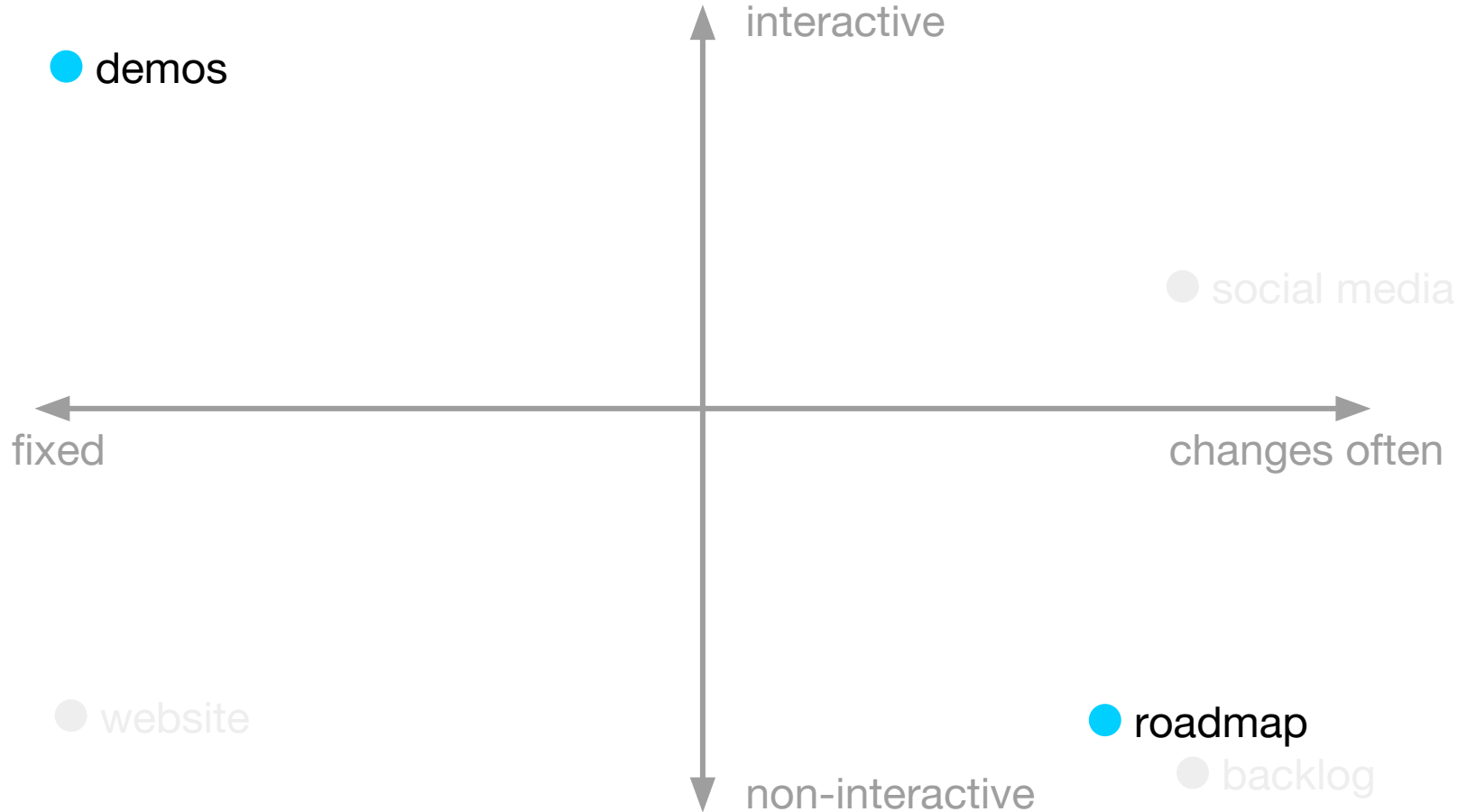
Is there anything missing?

Supplemental comms
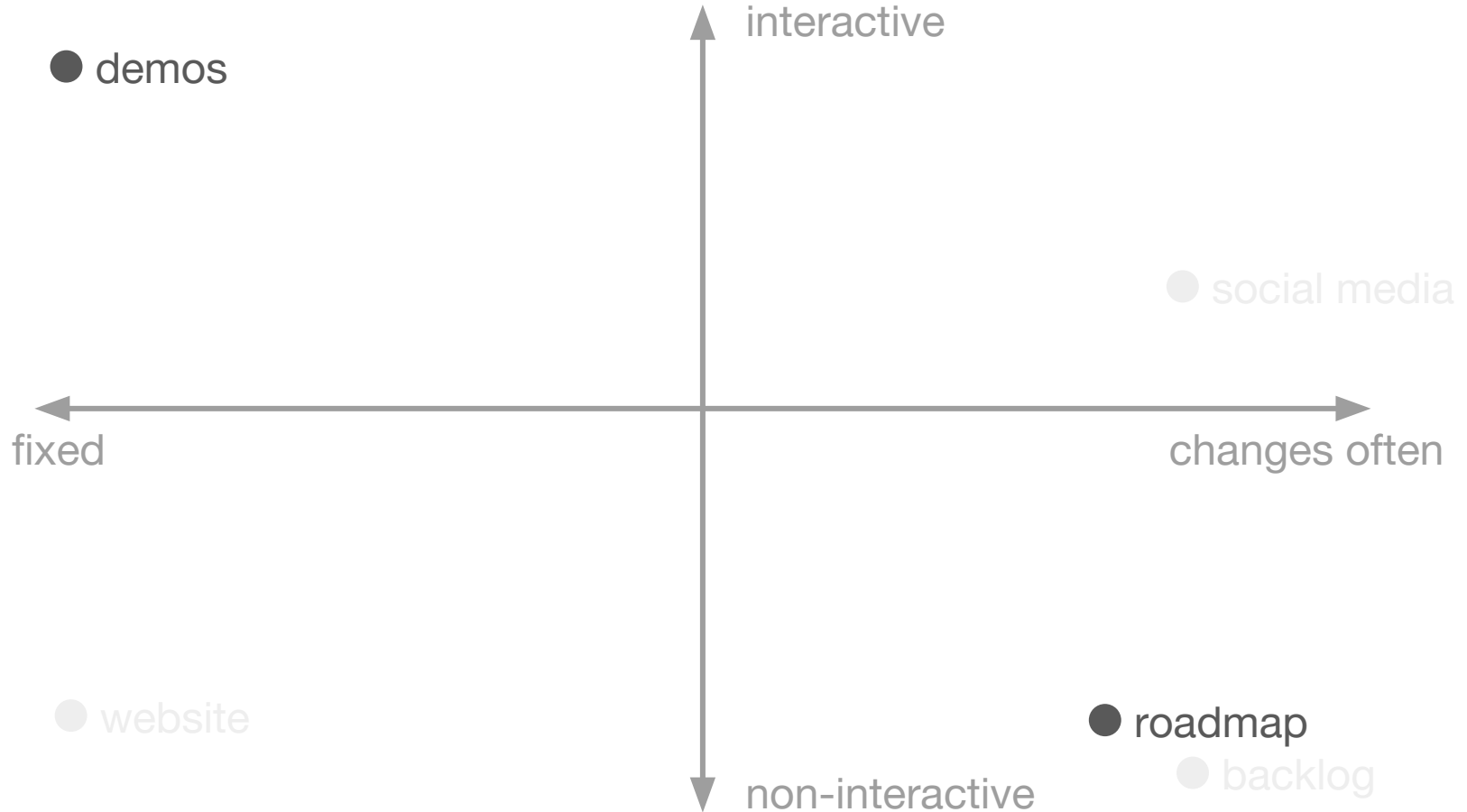
interactive

● demos

● social media

fixed ←————————————————————————————→ changes often

● website

● roadmap

● backlog

non-interactive

Supplemental comms

interactive

● demos

● social media

fixed ←→ changes often

○ status reports
● roadmap

● website

● backlog

non-interactive
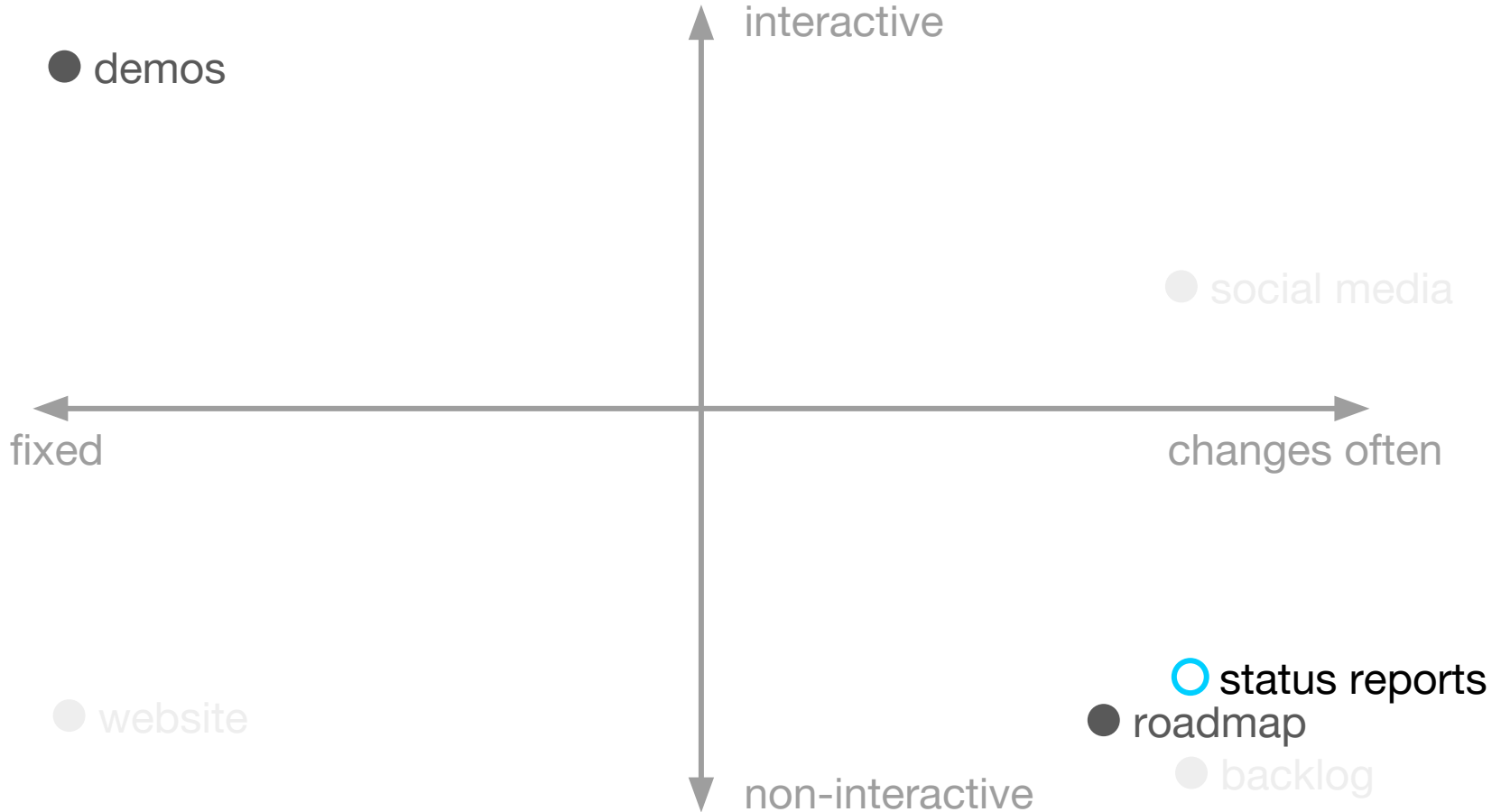
Stitching all of that together gives us a set of strategic communication channels.

Strategic channels

interactive

demos

social media

fixed · changes often

status reports
roadmap
backlog
website

non-interactive
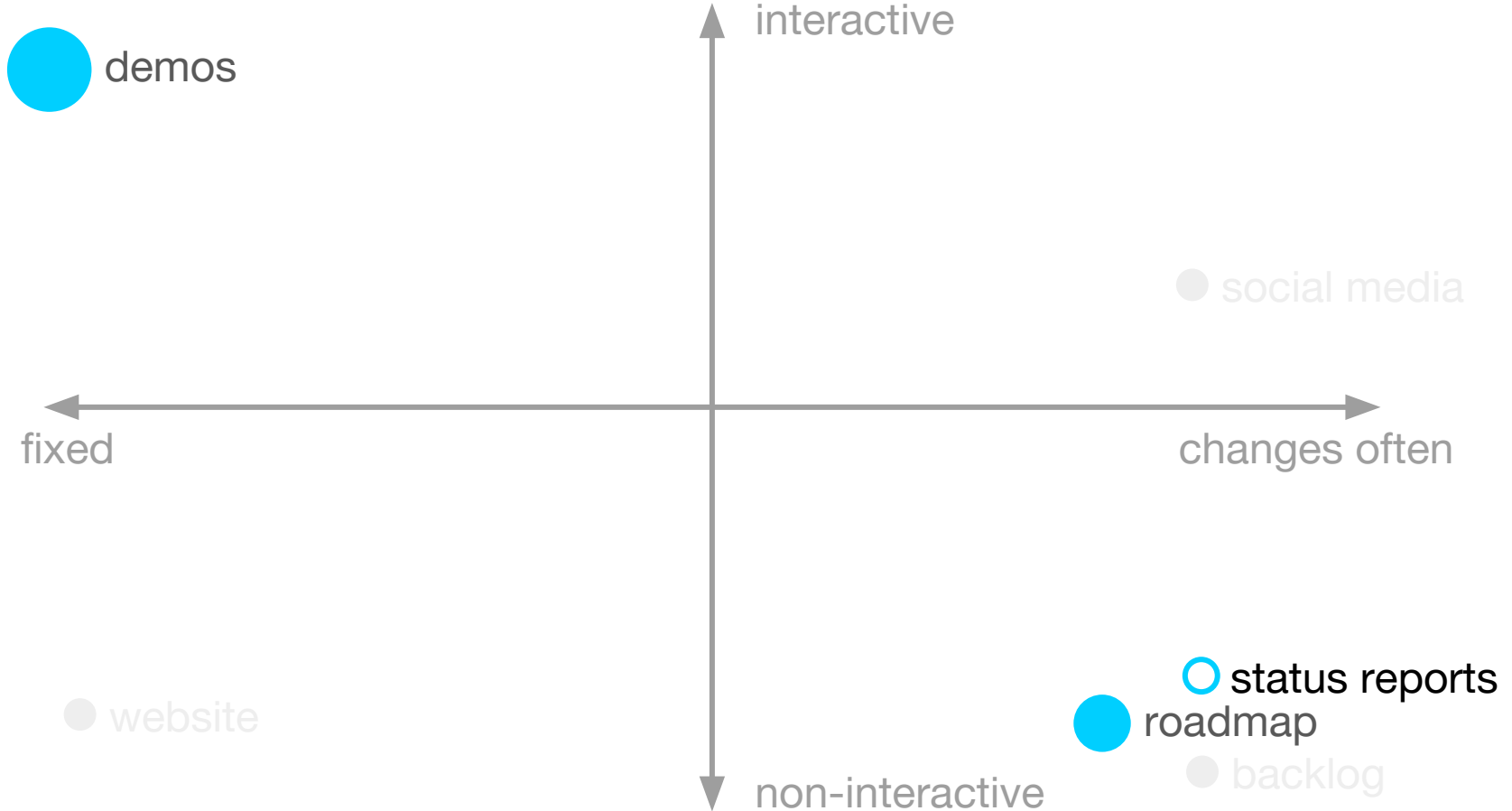
Stitching all of that together gives us a set of strategic communication channels. **Combine that with our core message, and we have the makings of an overarching communication strategy.**

The last piece is cadence:

The last piece is cadence: **how often do we use each channel, and involve or communicate with each set of audiences and stakeholders?**

The last piece is cadence: **how often** do we use each channel, and involve or communicate with each set of audiences and stakeholders?

… which may depend on channel.

What are your channels?

What communication channels are available to you?

Which ones do you own? Which ones are out of your control?

Who listens to each channel?

What is each channel normally used for? What expectations do people have when they go there?

What is your most important communication channel? Your top 3?

Empowering your champions

Roadshow the product to gain support

Show it off!

- **roadmap**
- **progress**
- **the future**
- **take suggestions**
- **ask for them to be a change champion, agent or ambassador**

Once you have a stakeholder who volunteers for a change-supporting role, provide all the supporting materials to make that happen.

useful data
clear requests
+ **smart framing**
---
the right message

Allow them to own their level of involvement*

*Unless it's too low to be effective

Supplement with:
- **documentation**
- **messaging**
- **continuous invitations to participate***

*one declined invitation does not mean they're not interested (nor does five)

How else can we empower change champions, agents, ambassadors?

Can you increase their level of ownership? Perhaps ask them to inform the backlog/prioritization?

What else?

Communicating the strategy internally

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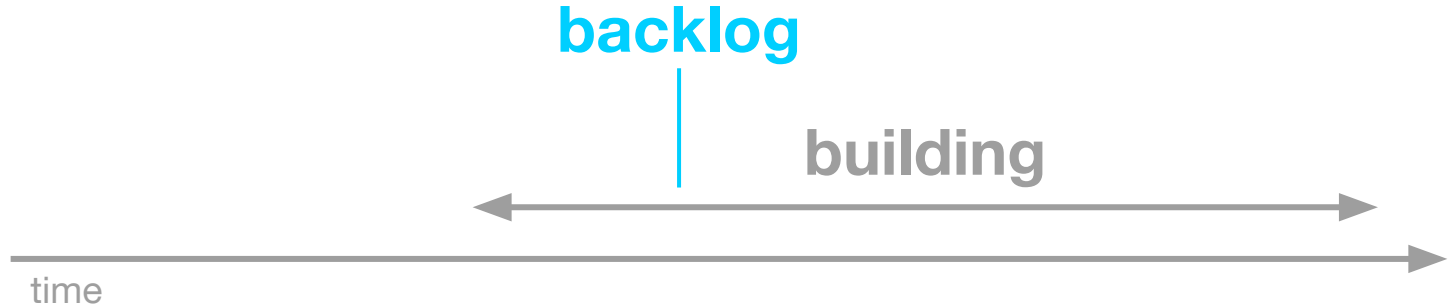# Strategic thinking starts during the planning process.

planning

time

And gets adjusted as you learn while building your product.

building

time

At the start of each effort, we need framing to understand the space.

Once we know the problem, the backlog communicates the strategy.

backlog

building

time

Recap

Components of an HCD product:

- **Vision / strategy / tactics**
- **Roadmap / backlog / planning / iteration**
- **Product narrative**
- **Transparency**

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Components of a stakeholder engagement plan:

- **Prioritized audiences**
- **Strategic communication channels for each**
- **The right message**
  - useful data, clear requests, smart framing
- **The right cadence**

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In order to:

- **Empower your champions**
- **Communicate your strategy internally**
- **Gain support**
- **Seize opportunity and mitigate risk**

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