13

PROJECT STAKEHOLDER MANAGEMENT

Project Stakeholder Management includes the processes required to identify the people, groups, or organizations that could impact or be impacted by the project, to analyze stakeholder expectations and their impact on the project, and to develop appropriate management strategies for effectively engaging stakeholders in project decisions and execution. The processes support the work of the project team to analyze stakeholder expectations, assess the degree to which they impact or are impacted by the project, and develop strategies to effectively engage stakeholders in support of project decisions and the planning and execution of the work of the project.

The Project Stakeholder Management processes are:

13.1 Identify Stakeholders—The process of identifying project stakeholders regularly and analyzing and documenting relevant information regarding their interests, involvement, interdependencies, influence, and potential impact on project success.

13.2 Plan Stakeholder Engagement—The process of developing approaches to involve project stakeholders based on their needs, expectation, interests, and potential impact on the project.

13.3 Manage Stakeholder Engagement—The process of communicating and working with stakeholders to meet their needs and expectations, address issues, and foster appropriate stakeholder engagement involvement.

13.4 Monitor Stakeholder Engagement—The process of monitoring project stakeholder relationships and tailoring strategies for engaging stakeholders through the modification of engagement strategies and plans.

Figure 13-1 provides an overview of the Project Stakeholder Management processes. The Project Stakeholder Management processes are presented as discrete processes with defined interfaces while, in practice, they overlap and interact in ways that cannot be completely detailed in the *PMBOK® Guide*.

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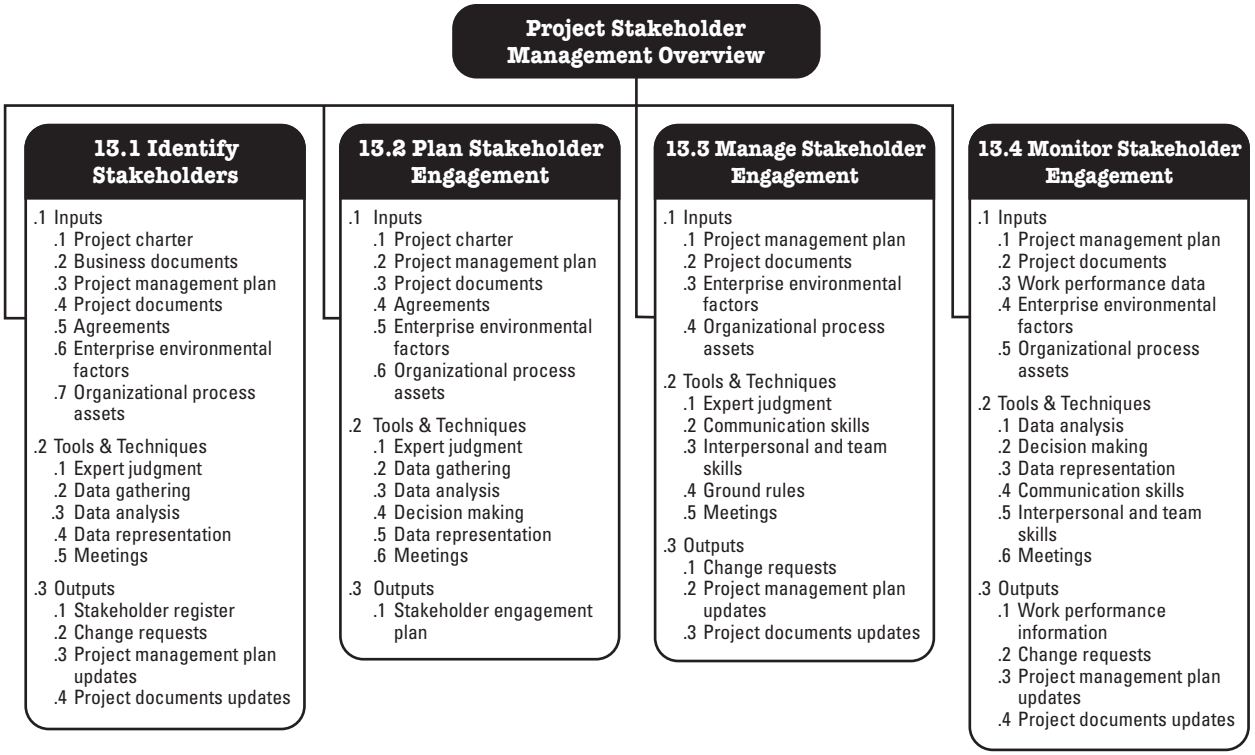

Figure 13-1. Project Stakeholder Management Overview

KEY CONCEPTS FOR PROJECT STAKEHOLDER MANAGEMENT

Every project has stakeholders who are impacted by or can impact the project in a positive or negative way. Some stakeholders may have a limited ability to influence the project's work or outcomes; others may have significant influence on the project and its expected outcomes. Academic research and analyses of high-profile project disasters highlight the importance of a structured approach to the identification, prioritization, and engagement of all stakeholders. The ability of the project manager and team to correctly identify and engage all stakeholders in an appropriate way can mean the difference between project success and failure. To increase the chances of success, the process of stakeholder identification and engagement should commence as soon as possible after the project charter has been approved, the project manager has been assigned and the team begins to form.

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Stakeholder satisfaction should be identified and managed as a project objective. The key to effective stakeholder engagement is a focus on continuous communication with all stakeholders, including team members, to understand their needs and expectations, address issues as they occur, manage conflicting interests, and foster appropriate stakeholder engagement in project decisions and activities.

The process of identifying and engaging stakeholders for the benefit of the project is iterative. Although the processes in Project Stakeholder Management are described only once, the activities of identification, prioritization, and engagement should be reviewed and updated routinely, and at least at the following times when:

- The project moves through different phases in its life cycle,
- Current stakeholders are no longer involved in the work of the project or new stakeholders become members of the project's stakeholder community, or
- There are significant changes in the organization or the wider stakeholder community.

TRENDS AND EMERGING PRACTICES IN PROJECT STAKEHOLDER ENGAGEMENT

Broader definitions of stakeholders are being developed that expand the traditional categories of employees, suppliers, and shareholders to include groups such as regulators, lobby groups, environmentalists, financial organizations, the media, and those who simply believe they are stakeholders—they perceive that they will be affected by the work or outcomes of the project.

Trends and emerging practices for Project Stakeholder Management include but are not limited to:

- Identifying all stakeholders, not just a limited set;
- Ensuring that all team members are involved in stakeholder engagement activities;
- Reviewing the stakeholder community regularly, often in parallel with reviews of individual project risks;
- Consulting with stakeholders who are most affected by the work or outcomes of the project through the concept of co-creation. Co-creation places greater emphasis on including affected stakeholders in the team as partners; and
- Capturing the value of effective stakeholder engagement, both positive and negative. Positive value can be based on the consideration of benefits derived from higher levels of active support from stakeholders, particularly powerful stakeholders. Negative value can be derived by measuring the true costs of not engaging stakeholders effectively, leading to product recalls or loss of organizational or project reputation.

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TAILORING CONSIDERATIONS

Because each project is unique, the project manager may need to tailor the way Project Stakeholder Management processes are applied. Considerations for tailoring include but are not limited to:

- **Stakeholder diversity.** How many stakeholders are there? How diverse is the culture within the stakeholder community?
- **Complexity of stakeholder relationships.** How complex are the relationships within the stakeholder community? The more networks a stakeholder or stakeholder group participates in, the more complex the networks of information and misinformation the stakeholder may receive.
- **Communication technology.** What communication technology is available? What support mechanisms are in place to ensure that best value is achieved from the technology?

CONSIDERATIONS FOR AGILE/ADAPTIVE ENVIRONMENTS

Projects experiencing a high degree of change require active engagement and participation with project stakeholders. To facilitate timely, productive discussion and decision making, adaptive teams engage with stakeholders directly rather than going through layers of management. Often the client, user, and developer exchange information in a dynamic co-creative process that leads to more stakeholder involvement and higher satisfaction. Regular interactions with the stakeholder community throughout the project mitigate risk, build trust, and support adjustments earlier in the project cycle, thus reducing costs and increasing the likelihood of success for the project.

In order to accelerate the sharing of information within and across the organization, agile methods promote aggressive transparency. The intent of inviting any stakeholders to project meetings and reviews or posting project artifacts in public spaces is to surface as quickly as possible any misalignment, dependency, or other issue related to the changing project.

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13.1 IDENTIFY STAKEHOLDERS

Identify Stakeholders is the process of identifying project stakeholders regularly and analyzing and documenting relevant information regarding their interests, involvement, interdependencies, influence, and potential impact on project success. The key benefit of this process is that it enables the project team to identify the appropriate focus for engagement of each stakeholder or group of stakeholders. This process is performed periodically throughout the project as needed. The inputs, tools and techniques, and outputs of the process are depicted in Figure 13-2. Figure 13-3 depicts the data flow diagram for the process.

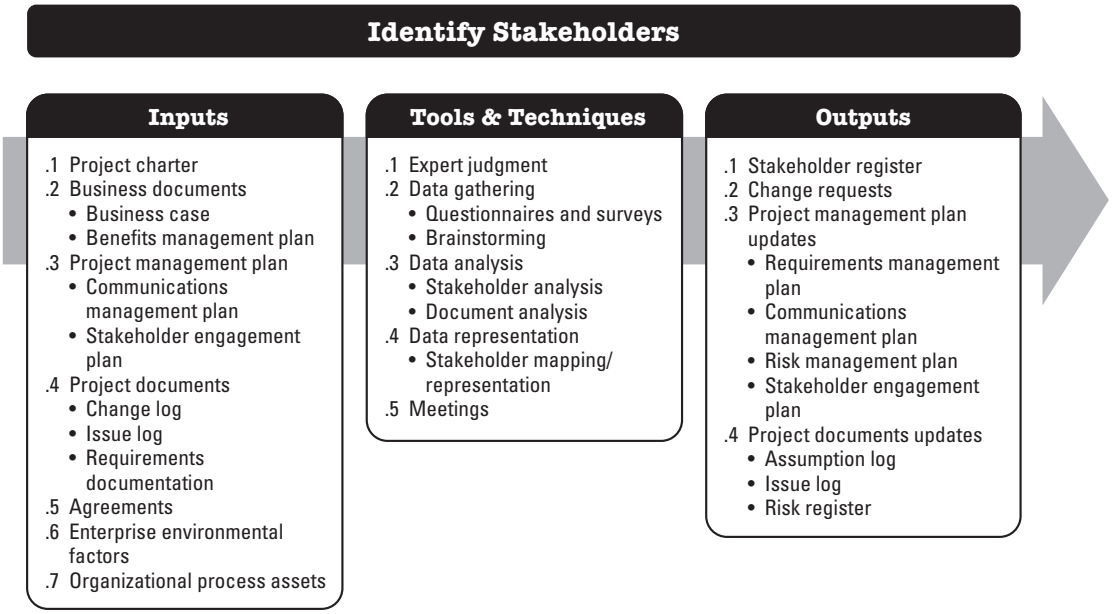

Figure 13-2. Identify Stakeholders: Inputs, Tools & Techniques, and Outputs

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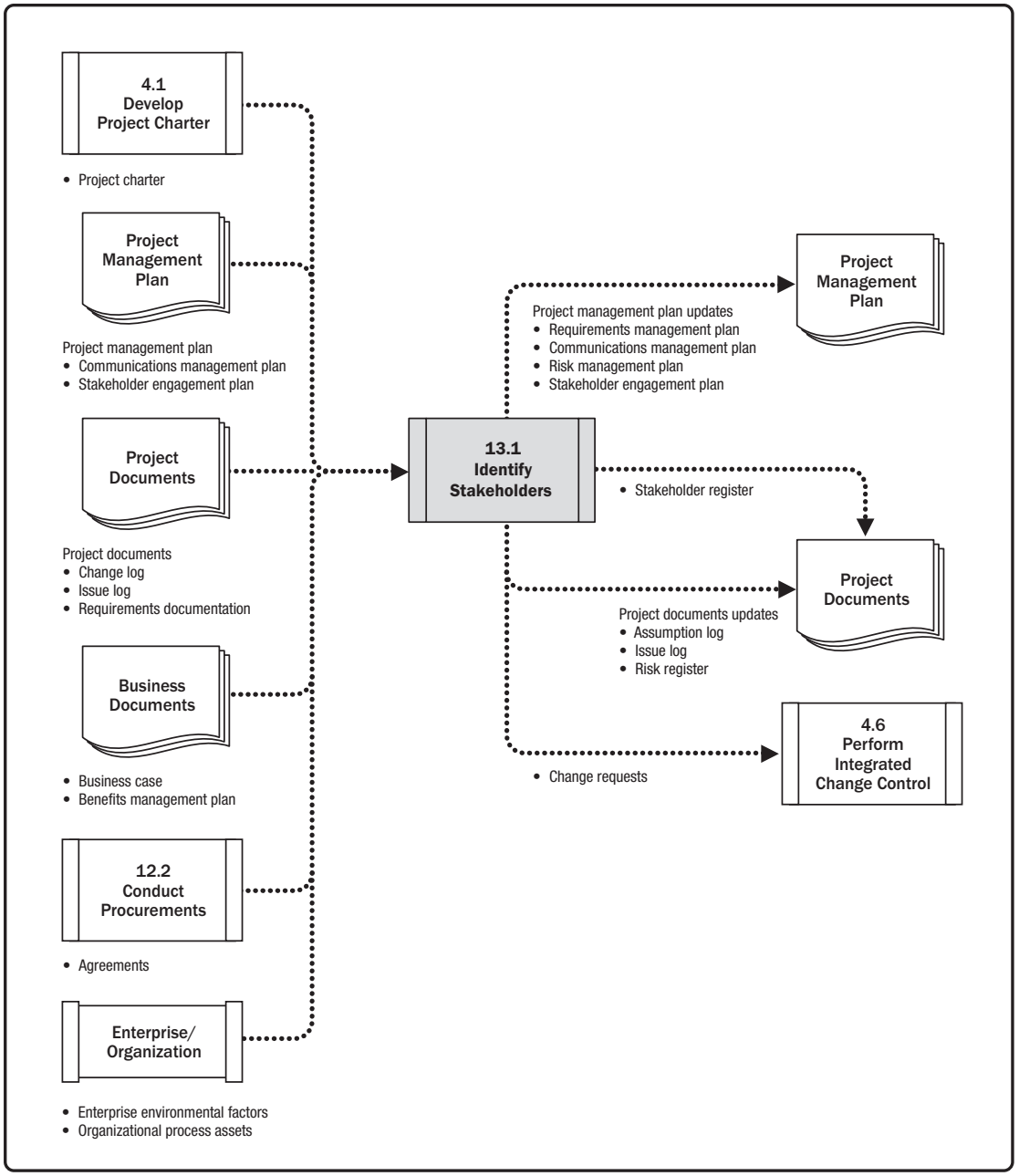

Figure 13-3. Identify Stakeholders: Data Flow Diagram

This process frequently occurs for the first time in a project either prior to or at the same time the project charter is developed and approved. It is repeated as necessary, but should be performed at the start of each phase and when a significant change in the project or the organization occurs. Each time the identification process is repeated, the project management plan components and project documents should be consulted to identify relevant project stakeholders.

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13.1.1 IDENTIFY STAKEHOLDERS: INPUTS

13.1.1.1 PROJECT CHARTER

Described in Section 4.1.3.1. The project charter identifies the key stakeholder list. It may also contain information about the responsibilities of the stakeholders.

13.1.1.2 BUSINESS DOCUMENTS

In the first iteration of the Identify Stakeholders process, the business case and the benefits management plan are sources of information about the project's stakeholders.

- **Business case.** Described in Section 1.2.6.1. The business case identifies the project objectives and identifies an initial list of stakeholders affected by the project.
- **Benefits management plan.** Described in Section 1.2.6.2. The benefits management plan describes the expected plan for realizing the benefits claimed in the business case. It may identify the individuals and groups that will benefit from the delivery of the outcomes of the project and are thus considered as stakeholders.

13.1.1.3 PROJECT MANAGEMENT PLAN

Described in Section 4.2.3.1. The project management plan is not available when initially identifying stakeholders; however, once it has been developed, project management plan components include but are not limited to:

- **Communications management plan.** Described in Section 10.1.3.1. Communications and stakeholder engagement are strongly linked. Information included in the communications management plan is a source of knowledge about the project's stakeholders.
- **Stakeholder engagement plan.** Described in Section 13.2.3.1. The stakeholder engagement plan identifies the management strategies and actions required to effectively engage stakeholders.

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13.1.1.4 PROJECT DOCUMENTS

It is unlikely that any project documents will be an input for the initial stakeholder identification. However, stakeholder identification occurs throughout the project. Once the project is past the startup phase, more documents become available and are used throughout the project. Project documents that can be considered as inputs for this process include but are not limited to:

- **Change log.** Described in Section 4.6.3.3. The change log may introduce a new stakeholder or change the nature of an existing stakeholder's relationship to the project.
- **Issue log.** Described in Section 4.3.3.3. The issue log records issues that may introduce new stakeholders to the project or change the type of participation of existing stakeholders.
- **Requirements documentation.** Described in Section 5.2.3.1. Requirements can provide information on potential stakeholders.

13.1.1.5 AGREEMENTS

Described in Section 12.2.3.2. The parties of an agreement are project stakeholders. The agreement can contain references to additional stakeholders.

13.1.1.6 ENTERPRISE ENVIRONMENTAL FACTORS

The enterprise environmental factors that can influence the Identify Stakeholders process include but are not limited to:

- Organizational culture, political climate, and governance framework;
- Government or industry standards (regulations, product standards, and codes of conduct);
- Global, regional, or local trends and practices or habits; and
- Geographic distribution of facilities and resources.

13.1.1.7 ORGANIZATIONAL PROCESS ASSETS

The organizational process assets that can influence the Identify Stakeholders process include but are not limited to:

- Stakeholder register templates and instructions,
- Stakeholder registers from previous projects, and
- Lessons learned repository with information about the preferences, actions, and involvement of stakeholders.

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13.1.2 IDENTIFY STAKEHOLDERS: TOOLS AND TECHNIQUES

13.1.2.1 EXPERT JUDGMENT

Described in Section 4.1.2.1. Expertise should be considered from individuals or groups with specialized knowledge or training in the following topics:

- Understanding the politics and power structures in the organization,
- Knowledge of the environment and culture of the organization and other affected organizations including customers and the wider environment,
- Knowledge of the industry or type of project deliverable, and
- Knowledge of individual team member contributions and expertise.

13.1.2.2 DATA GATHERING

Data-gathering techniques that can be used for this process include but are not limited to:

- **Questionnaires and surveys.** Described in Section 5.2.2.2. Questionnaires and surveys can include one-on-one reviews, focus group sessions, or other mass information collection techniques.
- **Brainstorming.** Described in Section 4.1.2.2. Brainstorming as used to identify stakeholders can include both brainstorming and brain writing.
  - *Brainstorming.* A general data-gathering and creativity technique that elicits input from groups such as team members or subject matter experts.
  - *Brain writing.* A refinement of brainstorming that allows individual participants time to consider the question(s) individually before the group creativity session is held. The information can be gathered in face-to-face groups or using virtual environments supported by technology.

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13.1.2.3 DATA ANALYSIS

Data analysis techniques that can be used for this process include but are not limited to:

- **Stakeholder analysis.** Stakeholder analysis results in a list of stakeholders and relevant information such as their positions in the organization, roles on the project, "stakes," expectations, attitudes (their levels of support for the project), and their interest in information about the project. Stakeholders' stakes can include but are not limited to a combination of:
  - *Interest.* A person or group can be affected by a decision related to the project or its outcomes.
  - *Rights (legal or moral rights).* Legal rights, such as occupational health and safety, may be defined in the legislation framework of a country. Moral rights may involve concepts of protection of historical sites or environmental sustainability.
  - *Ownership.* A person or group has a legal title to an asset or a property.
  - *Knowledge.* Specialist knowledge, which can benefit the project through more effective delivery of project objectives, organizational outcomes, or knowledge of the power structures of the organization.
  - *Contribution.* Provision of funds or other resources, including human resources, or providing support for the project in more intangible ways, such as advocacy in the form of promoting the objectives of the project or acting as a buffer between the project and the power structures of the organization and its politics.
- **Document analysis.** Described in Section 5.2.2.3. Assessing the available project documentation and lessons learned from previous projects to identify stakeholders and other supporting information.

13.1.2.4 DATA REPRESENTATION

A data representation technique that may be used in this process includes but is not limited to stakeholder mapping/representation. Stakeholder mapping and representation is a method of categorizing stakeholders using various methods. Categorizing stakeholders assists the team in building relationships with the identified project stakeholders. Common methods include:

- **Power/interest grid, power/influence grid, or impact/influence grid.** Each of these techniques supports a grouping of stakeholders according to their level of authority (power), level of concern about the project's outcomes (interest), ability to influence the outcomes of the project (influence), or ability to cause changes to the project's planning or execution. These classification models are useful for small projects or for projects with simple relationships between stakeholders and the project, or within the stakeholder community itself.

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- **Stakeholder cube.** This is a refinement of the grid models previously mentioned. This model combines the grid elements into a three-dimensional model that can be useful to project managers and teams in identifying and engaging their stakeholder community. It provides a model with multiple dimensions that improves the depiction of the stakeholder community as a multidimensional entity and assists with the development of communication strategies.
- **Salience model.** Describes classes of stakeholders based on assessments of their power (level of authority or ability to influence the outcomes of the project), urgency (need for immediate attention, either time-constrained or relating to the stakeholders' high stake in the outcome), and legitimacy (their involvement is appropriate). There is an adaptation of the salience model that substitutes proximity for legitimacy (applying to the team and measuring their level of involvement with the work of the project). The salience model is useful for large complex communities of stakeholders or where there are complex networks of relationships within the community. It is also useful in determining the relative importance of the identified stakeholders.
- **Directions of influence.** Classifies stakeholders according to their influence on the work of the project or the project team itself. Stakeholders can be classified in the following ways:
  - *Upward* (senior management of the performing organization or customer organization, sponsor, and steering committee),
  - *Downward* (the team or specialists contributing knowledge or skills in a temporary capacity),
  - *Outward* (stakeholder groups and their representatives outside the project team, such as suppliers, government departments, the public, end-users, and regulators), or
  - *Sideward* (the peers of the project manager, such as other project managers or middle managers who are in competition for scarce project resources or who collaborate with the project manager in sharing resources or information).
- **Prioritization.** Prioritizing stakeholders may be necessary for projects with a large number of stakeholders, where the membership of the stakeholder community is changing frequently, or when the relationships between stakeholders and the project team or within the stakeholder community are complex.

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13.1.2.5 MEETINGS

Meetings are used to develop an understanding of significant project stakeholders. They can take the form of facilitation workshops, small group guided discussions, and virtual groups using electronics or social media technologies to share ideas and analyze data.

13.1.3 IDENTIFY STAKEHOLDERS: OUTPUTS

13.1.3.1 STAKEHOLDER REGISTER

The main output of the Identify Stakeholders process is the stakeholder register. This document contains information about identified stakeholders that includes but is not limited to:

- **Identification information.** Name, organizational position, location and contact details, and role on the project.
- **Assessment information.** Major requirements, expectations, potential for influencing project outcomes, and the phase of the project life cycle where the stakeholder has the most influence or impact.
- **Stakeholder classification.** Internal/external, impact/influence/power/interest, upward/downward/outward/sideward, or any other classification model chosen by the project manager.

13.1.3.2 CHANGE REQUESTS

Described in Section 4.3.3.4. During the first iteration of identifying stakeholders, there will not be any change requests. As stakeholder identification continues throughout the project, new stakeholders, or new information about stakeholders, may result in a change request to the product, project management plan, or project documents.

Change requests are processed for review and disposition through the Perform Integrated Change Control (Section 4.6) process.

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13.1.3.3 PROJECT MANAGEMENT PLAN UPDATES

When stakeholders are identified at the very beginning of a project, there will not be updates to the project management plan. As the project progresses, any change to the project management plan goes through the organization's change control process via a change request. Components that may require a change request for the project management plan include but are not limited to:

- **Requirements management plan.** Described in Section 5.1.3.2. Newly identified stakeholders can impact how requirements activities will be planned, tracked, and reported.
- **Communications management plan.** Described in Section 10.1.3.1. Stakeholder communication requirements and agreed-upon communications strategies are recorded in the communications management plan.
- **Risk management plan.** Described in Section 11.1.3.1. Where stakeholder communication requirements and agreed-upon communications strategies affect the approach to managing risk on the project, this is reflected in the risk management plan.
- **Stakeholder engagement plan.** Described in Section 13.2.3.1. Agreed-upon communications strategies for identified stakeholders are recorded in the stakeholder engagement plan.

13.1.3.4 PROJECT DOCUMENTS UPDATES

Project documents that may be updated as a result of carrying out this process include but are not limited to:

- **Assumption log.** Described in Section 4.1.3.2. Much of the information about the relative power, interest, and engagement of stakeholders is based on assumptions. This information is entered into the assumption log. Additionally, any constraints associated with interacting with specific stakeholders are entered as well.
- **Issue log.** Described in Section 4.3.3.3. New issues raised as a result of this process are recorded in the issue log.
- **Risk register.** Described in Section 11.2.3.1. New risks identified during this process are recorded in the risk register and managed using the risk management processes.

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13.2 PLAN STAKEHOLDER ENGAGEMENT

Plan Stakeholder Engagement is the process of developing approaches to involve project stakeholders based on their needs, expectations, interests, and potential impact on the project. The key benefit is that it provides an actionable plan to interact effectively with stakeholders. This process is performed periodically throughout the project as needed.

The inputs, tools and techniques, and outputs of the process are depicted in Figure 13-4. Figure 13-5 depicts the data flow diagram for the process.

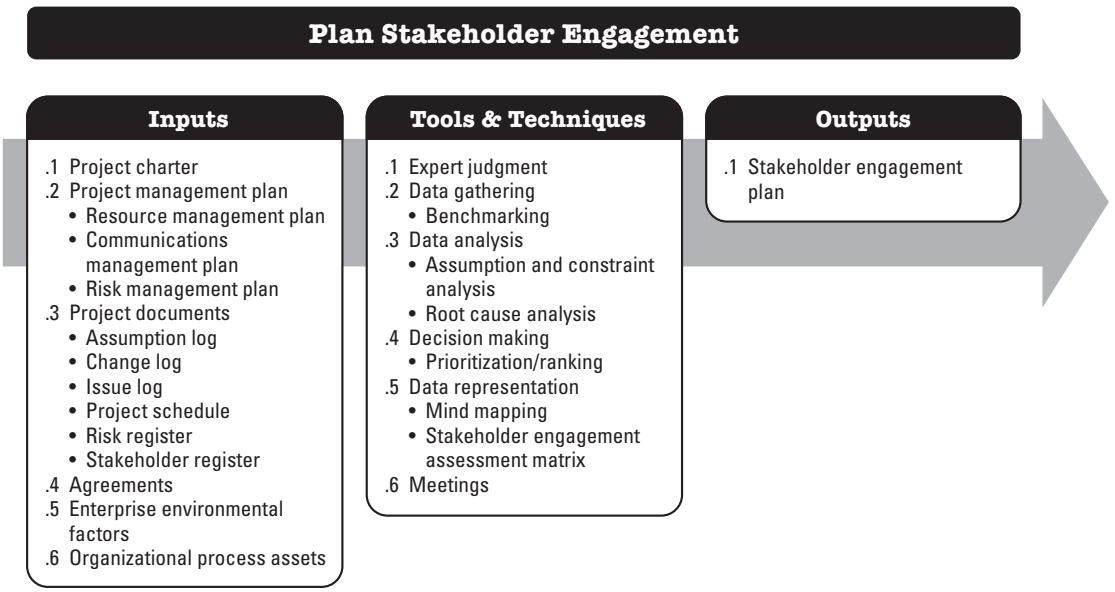

Figure 13-4. Plan Stakeholder Engagement: Inputs, Tools & Techniques, and Outputs

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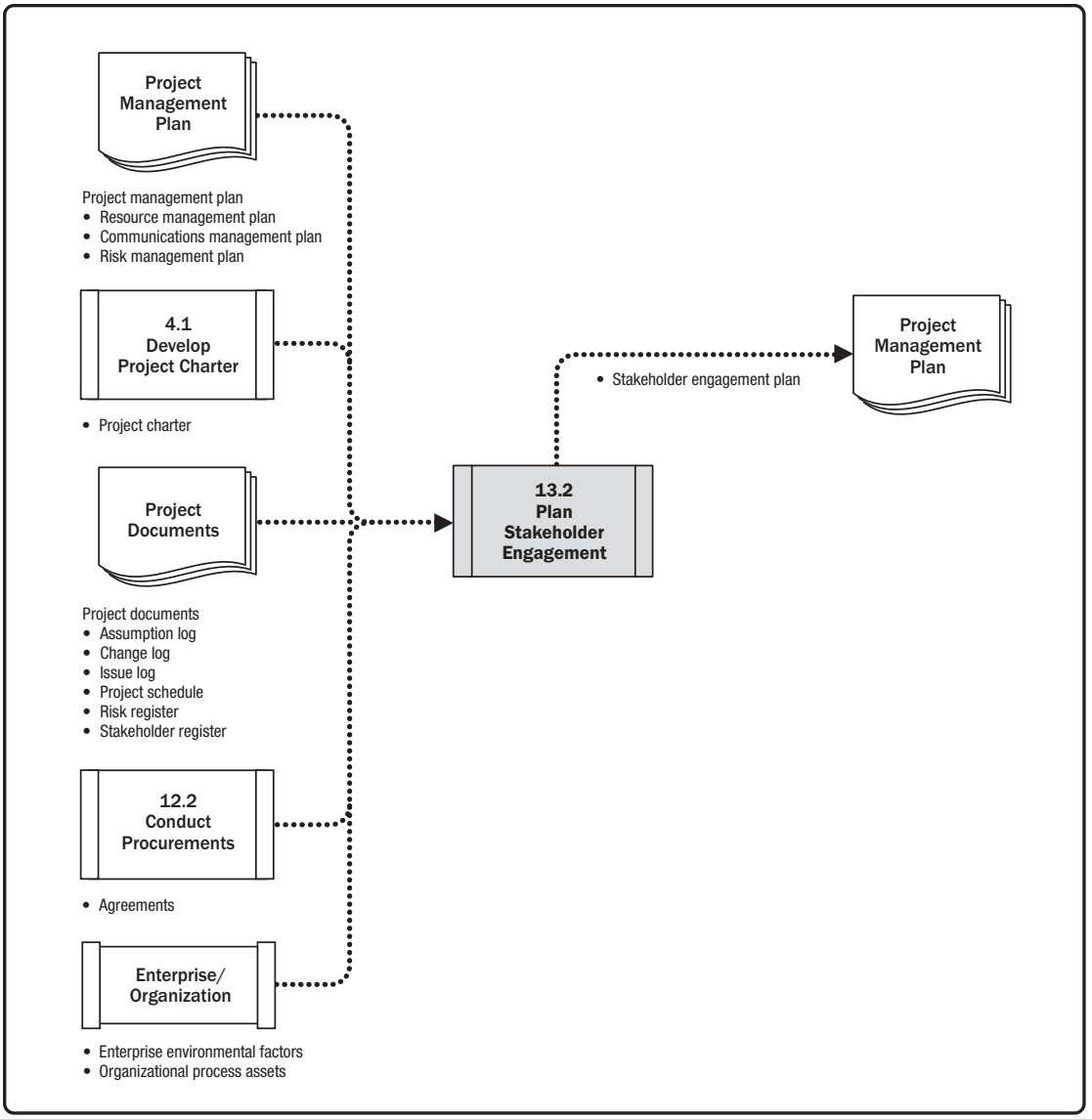

Figure 13-5. Plan Stakeholder Engagement: Data Flow Diagram

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An effective plan that recognizes the diverse information needs of the project's stakeholders is developed early in the project life cycle and is reviewed and updated regularly as the stakeholder community changes. The first version of the stakeholder engagement plan is developed after the initial stakeholder community has been identified by the Identify Stakeholder process. The stakeholder engagement plan is updated regularly to reflect changes to the stakeholder community. Typical trigger situations requiring updates to the plan include but are not limited to:

- When it is the start of a new phase of the project;
- When there are changes to the organization structure or within the industry;
- When new individuals or groups become stakeholders, current stakeholders are no longer part of the stakeholder community, or the importance of particular stakeholders to the project's success changes; and
- When outputs of other project process areas, such as change management, risk management, or issue management, require a review of stakeholder engagement strategies.

The results of these adjustments may be changes to the relative importance of the stakeholders who have been identified.

13.2.1 PLAN STAKEHOLDER ENGAGEMENT: INPUTS

13.2.1.1 PROJECT CHARTER

Described in Section 4.1.3.1. The project charter contains information on the project purpose, objectives, and success criteria that can be taken into consideration when planning how to engage stakeholders.

13.2.1.2 PROJECT MANAGEMENT PLAN

Described in Section 4.2.3.1. Project management plan components include but are not limited to:

- **Resource management plan.** Described in Section 9.1.3.1. The resource management plan may contain information regarding roles and responsibilities of the team and other stakeholders listed in the stakeholder register.
- **Communications management plan.** Described in Section 10.1.3.1. The communications strategies for stakeholder management and their implementation plans are both inputs to, and recipients of, information from processes in Project Stakeholder Management.
- **Risk management plan.** Described in Section 11.1.3.1. The risk management plan may contain risk thresholds or risk attitudes that can assist in the selection of the optimal stakeholder engagement strategy mix.

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13.2.1.3 PROJECT DOCUMENTS

Project documents that can be considered as inputs for this process, especially after initial planning has taken place, include but are not limited to:

- **Assumption log.** Described in Section 4.1.3.2. The assumption log contains information about assumptions and constraints and may be linked to specific stakeholders.
- **Change log.** Described in Section 4.6.3.3. The change log contains changes to the original scope of the project. It usually links to specific stakeholders because they fall into categories of requesting certain changes, making decisions about change requests, or being impacted by the implementation of approved changes.
- **Issue log.** Described in Section 4.3.3.3. Managing and resolving issues contained in the issue log will require additional communications with the stakeholders affected.
- **Project schedule.** Described in Section 6.5.3.2. The schedule contains activities that may be linked to specific stakeholders as owners or executors.
- **Risk register.** Described in Section 11.2.3.1. The risk register contains the identified risks of the project and usually links them to the specific stakeholders as either risk owners or as subject to risk impact.
- **Stakeholder register.** Described in Section 13.1.3.1. The stakeholder register provides the list of project stakeholders including additional classification data and other information.

13.2.1.4 AGREEMENTS

Described in Section 12.2.3.2. When planning for the engagement of contractors and suppliers, coordination usually involves working with the procurement/contracting group in the organization to ensure contractors and suppliers are effectively managed.

13.2.1.5 ENTERPRISE ENVIRONMENTAL FACTORS

The enterprise environmental factors that can influence Plan Stakeholder Engagement include but are not limited to:

- Organizational culture, political climate, and governance framework;
- Personnel administration policies;
- Stakeholder risk appetites;
- Established communication channels;
- Global regional or local trends, practices, or habits; and
- Geographic distribution of facilities and resources.

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13.2.1.6 ORGANIZATIONAL PROCESS ASSETS

The organizational process assets that can influence the Plan Stakeholder Engagement process include but are not limited to:

- Corporate policies and procedures for social media, ethics, and security;
- Corporate policies and procedures for issue, risk, change, and data management;
- Organizational communication requirements;
- Standardized guidelines for development, exchange, storage, and retrieval of information;
- Lessons learned repository with information about the preferences, actions, and involvement of stakeholders; and
- Software tools needed to support effective stakeholder engagement.

13.2.2 PLAN STAKEHOLDER ENGAGEMENT: TOOLS AND TECHNIQUES

13.2.2.1 EXPERT JUDGMENT

Described in Section 4.1.2.1. Expertise should be considered from individuals or groups with specialized knowledge or training in the following topics:

- Politics and power structures in the organization and outside the organization,
- Environment and culture of the organization and outside the organization,
- Analytical and assessment techniques to be used for stakeholder engagement processes,
- Communication means and strategies, and
- Knowledge from previous projects of the characteristics of stakeholders and stakeholder groups and organizations involved in the current project that may have been involved in previous similar projects.

13.2.2.2 DATA GATHERING

A data-gathering technique that can be used for this process includes but is not limited to benchmarking. Described in Section 8.1.2.2. The results of stakeholder analysis are compared with information from other organizations or other projects that are considered to be world class.

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13.2.2.3 DATA ANALYSIS

Data analysis techniques that can be used for this process include but are not limited to:

- **Assumption and constraint analysis.** Described in Section 11.2.2.3. Analysis of current assumptions and constraints may be conducted in order to tailor appropriate engagement strategies.
- **Root cause analysis.** Described in Section 8.2.2.2. Root cause analysis identifies underlying reasons for the level of support of project stakeholders in order to select the appropriate strategy to improve their level of engagement.

13.2.2.4 DECISION MAKING

Decision-making techniques that can be used for this process include but are not limited to prioritization/ranking. Stakeholder requirements need to be prioritized and ranked, as do the stakeholders themselves. Stakeholders with the most interest and the highest influence are often prioritized at the top of the list.

13.2.2.5 DATA REPRESENTATION

Data representation techniques that may be used in this process include but are not limited to:

- **Mind mapping.** Described in Section 5.2.2.3. Mind mapping is used to visually organize information about stakeholders and their relationship to each other and the organization.
- **Stakeholder engagement assessment matrix.** A stakeholder engagement assessment matrix supports comparison between the current engagement levels of stakeholders and the desired engagement levels required for successful project delivery. One way to classify the engagement level of stakeholders is shown in Figure 13-6. The engagement level of stakeholders can be classified as follows:
  - *Unaware.* Unaware of the project and potential impacts.
  - *Resistant*. Aware of the project and potential impacts but resistant to any changes that may occur as a result of the work or outcomes of the project. These stakeholders will be unsupportive of the work or outcomes of the project.
  - *Neutral*. Aware of the project, but neither supportive nor unsupportive.
  - *Supportive*. Aware of the project and potential impacts and supportive of the work and its outcomes.
  - *Leading*. Aware of the project and potential impacts and actively engaged in ensuring that the project is a success.

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In Figure 13-6, C represents the current engagement level of each stakeholder and D indicates the level that the project team has assessed as essential to ensure project success (desired). The gap between current and desired for each stakeholder will direct the level of communications necessary to effectively engage the stakeholder. The closing of this gap between current and desired is an essential element of monitoring stakeholder engagement.

Stakeholder	Unaware	Resistant	Neutral	Supportive	Leading
Stakeholder 1	C			D	
Stakeholder 2			C	D	
Stakeholder 3				D C	

Figure 13-6. Stakeholder Engagement Assessment Matrix

13.2.2.6 MEETINGS

Meetings are used to discuss and analyze the input data of the stakeholder engagement planning process and to develop a sound stakeholder engagement plan.

13.2.3 PLAN STAKEHOLDER ENGAGEMENT: OUTPUTS

13.2.3.1 STAKEHOLDER ENGAGEMENT PLAN

The stakeholder engagement plan is a component of the project management plan that identifies the strategies and actions required to promote productive involvement of stakeholders in decision making and execution. It can be formal or informal and highly detailed or broadly framed, based on the needs of the project and the expectations of stakeholders.

The stakeholder engagement plan may include but is not limited to specific strategies or approaches for engaging with individuals or groups of stakeholders.

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13.3 MANAGE STAKEHOLDER ENGAGEMENT

Manage Stakeholder Engagement is the process of communicating and working with stakeholders to meet their needs and expectations, address issues, and foster appropriate stakeholder involvement. The key benefit of this process is that it allows the project manager to increase support and minimize resistance from stakeholders. This process is performed throughout the project. The inputs, tools and techniques, and outputs of the process are depicted in Figure 13-7. Figure 13-8 depicts the data flow diagram for the process.

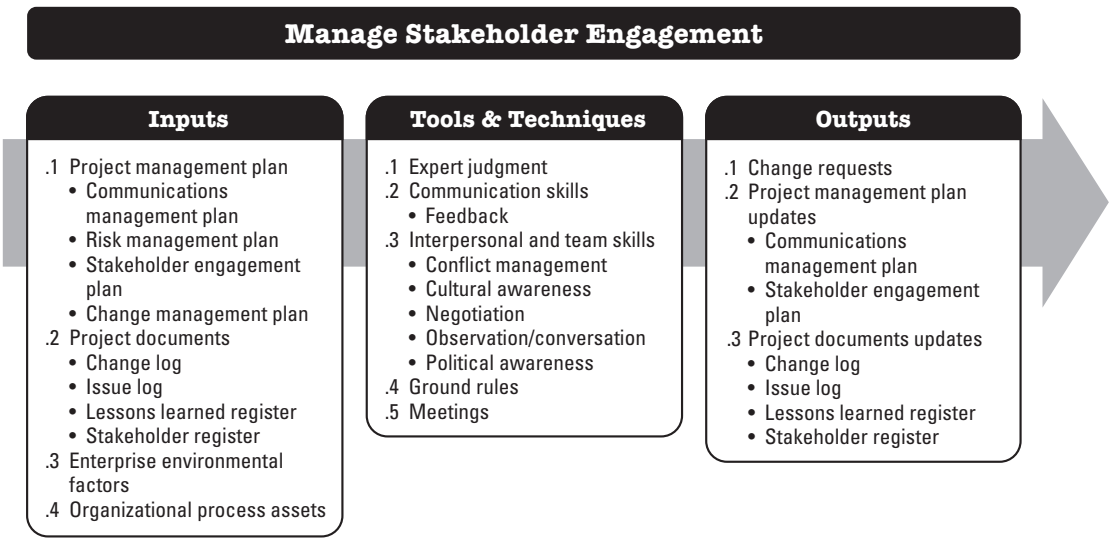

Figure 13-7. Manage Stakeholder Engagement: Inputs, Tools & Techniques, and Outputs

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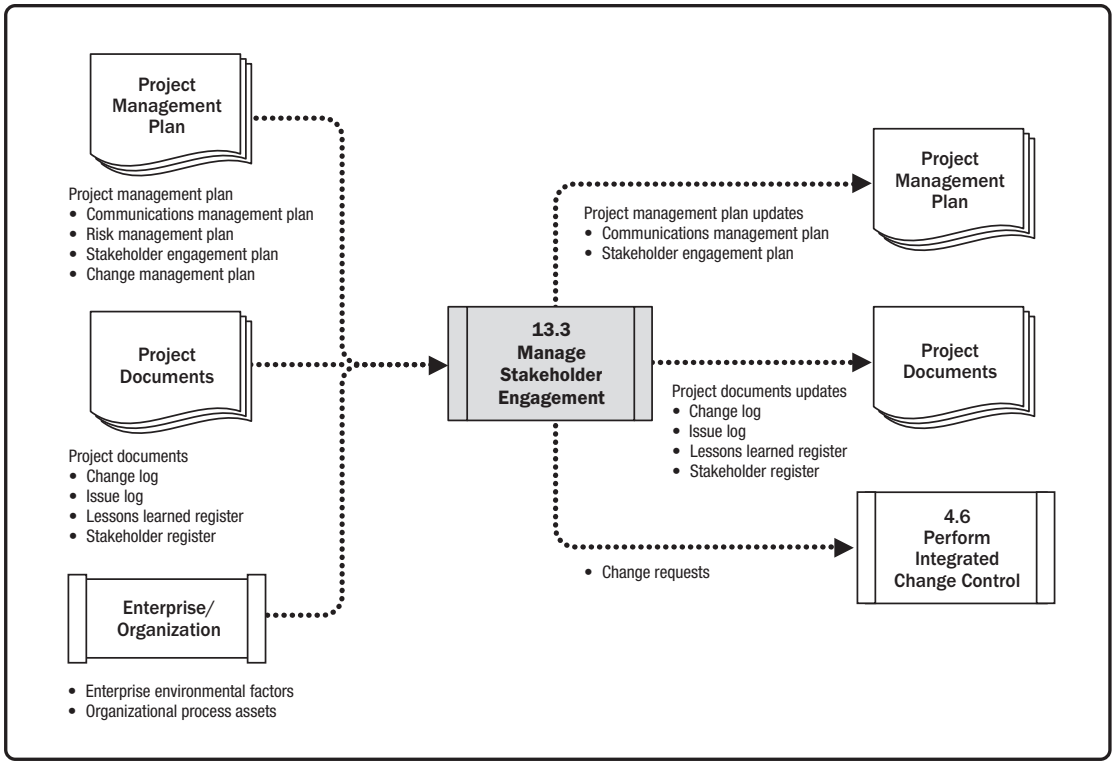

Figure 13-8. Manage Stakeholder Engagement: Data Flow Diagram

Manage Stakeholder Engagement involves activities such as:

- Engaging stakeholders at appropriate project stages to obtain, confirm, or maintain their continued commitment to the success of the project;
- Managing stakeholder expectations through negotiation and communication;
- Addressing any risks or potential concerns related to stakeholder management and anticipating future issues that may be raised by stakeholders; and
- Clarifying and resolving issues that have been identified.

Managing stakeholder engagement helps to ensure that stakeholders clearly understand the project goals, objectives, benefits, and risks for the project, as well as how their contribution will enhance project success.

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13.3.1 MANAGE STAKEHOLDER ENGAGEMENT: INPUTS

13.3.1.1 PROJECT MANAGEMENT PLAN

Described in Section 4.2.3.1. Project management plan components include but are not limited to:

- **Communications management plan.** Described in Section 10.1.3.1. The communications management plan describes the methods, formats, and technologies used for stakeholder communication.
- **Risk management plan.** Described in Section 11.1.3.1. The risk management plan describes the risk categories, risk appetites, and reporting formats that can be used to manage stakeholder engagement.
- **Stakeholder engagement plan.** Described in Section 13.2.3.1. The stakeholder engagement plan provides guidance and information on managing stakeholder expectations.
- **Change management plan.** Described in Section 4.2.3.1. The change management plan describes the process for submitting, evaluating and implementing changes to the project.

13.3.1.2 PROJECT DOCUMENTS

Project documents that can be considered as inputs to this process include but are not limited to:

- **Change log.** Described in Section 4.6.3.3. Change requests and their status are documented in the change log and communicated to the appropriate stakeholders.
- **Issue log.** Described in Section 4.3.3.3. Any project or stakeholder concerns are documented in the issue log, as well as any assigned action items associated with managing the issue.
- **Lessons learned register.** Described in Section 4.4.3.1. Lessons learned earlier in the project with regard to managing stakeholder engagement can be applied to later phases in the project to improve the efficiency and effectiveness of this process.
- **Stakeholder register.** Described in Section 13.1.3.1. The stakeholder register provides the list of project stakeholders and any information needed to execute the stakeholder engagement plan.

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13.3.1.3 ENTERPRISE ENVIRONMENTAL FACTORS

The enterprise environmental factors that can influence the Manage Stakeholder Engagement include but are not limited to:

- Organizational culture, political climate, and governance structure of the organization;
- Personnel administration policies;
- Stakeholder risk thresholds;
- Established communication channels;
- Global, regional, or local trends, practices, or habits; and
- Geographic distribution of facilities and resources.

13.3.1.4 ORGANIZATIONAL PROCESS ASSETS

The organizational process assets that can influence the Manage Stakeholder Engagement process include but are not limited to:

- Corporate policies and procedures for social media, ethics, and security;
- Corporate policies and procedures for issue, risk, change, and data management;
- Organizational communication requirements;
- Standardized guidelines for development, exchange, storage, and retrieval of information; and
- Historical information from previous similar projects.

13.3.2 MANAGE STAKEHOLDER ENGAGEMENT: TOOLS AND TECHNIQUES

13.3.2.1 EXPERT JUDGMENT

Described in Section 4.1.2.1. Expertise should be considered from individuals or groups with specialized knowledge or training in the following topics:

- Politics and power structures in the organization and outside the organization;
- Environment and culture of the organization and outside the organization;
- Analytical and assessment techniques to be used for stakeholder engagement processes;
- Communication methods and strategies;
- Characteristics of stakeholders, stakeholder groups, and organizations involved in the current project that may have been involved in previous projects; and
- Requirements management, vendor management, and change management.

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13.3.2.2 COMMUNICATION SKILLS

The methods of communication identified for each stakeholder in the communications management plan are applied during stakeholder engagement management. The project management team uses feedback to assist in understanding stakeholder reaction to the various project management activities and key decisions. Feedback may be collected in the following ways, but not limited to:

- Conversations; both formal and informal,
- Issue identification and discussion,
- Meetings,
- Progress reporting, and
- Surveys.

13.3.2.3 INTERPERSONAL AND TEAM SKILLS

Interpersonal and team skills that can be used for this process include but are not limited to:

- **Conflict management.** Described in Section 9.5.2.1. The project manager should ensure that conflicts are resolved in a timely manner.
- **Cultural awareness.** Described in Section 10.1.2.6. Cultural awareness is used to help the project manager and team to communicate effectively by considering cultural differences and the requirements of stakeholders.
- **Negotiation.** Described in Section 12.2.2.5. Negotiation is used to achieve support or agreement that supports the work of the project or its outcomes and to resolve conflicts within the team or with other stakeholders.
- **Observation/conversation.** Described in Section 5.2.2.6. Observation/conversation is used to stay in touch with the work and attitudes of project team members and other stakeholders.
- **Political awareness.** Described in Section 10.1.2.6. Political awareness is achieved through understanding the power relationships within and around the project.

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13.3.2.4 GROUND RULES

Ground rules, defined in the team charter set the expected behavior for project team members, as well as other stakeholders, with regard to stakeholder engagement.

13.3.2.5 MEETINGS

Described in Section 10.1.2.8. Meetings are used to discuss and address any issue or concern regarding stakeholder engagement. Types of meetings that are beneficial as part of this process include but are not limited to:

- Decision making,
- Issue resolution,
- Lessons learned and retrospectives,
- Project kick-off,
- Sprint planning, and
- Status updates.

13.3.3 MANAGE STAKEHOLDER ENGAGEMENT: OUTPUTS

13.3.3.1 CHANGE REQUESTS

Described in Section 4.3.3.4. As a result of managing stakeholder engagement, changes to the project scope or product scope may emerge. All change requests are processed for review and disposition through the Perform Integrated Change Control process (Section 4.6).

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13.3.3.2 PROJECT MANAGEMENT PLAN UPDATES

Any change to the project management plan goes through the organization's change control process via a change request. Components of the project management plan that may require a change request for the project management plan include but are not limited to:

- **Communications management plan.** Described in Section 10.1.3.1. The communications management plan is updated to reflect new or changed stakeholder requirements.
- **Stakeholder engagement plan.** Described in Section 13.2.3.1. The stakeholder engagement plan is updated to reflect new or changed management strategies required to effectively engage stakeholders.

13.3.3.3 PROJECT DOCUMENTS UPDATES

Project documents that may be updated as a result of carrying out this process include but are not limited to:

- **Change log.** Described in Section 4.6.3.3. The change log may be updated based on any change requests.
- **Issue log.** Described in Section 4.3.3.3. The issue log may be updated to reflect an update to, or the development of, an issue log entry.
- **Lessons learned register.** Described in Section 4.4.3.1. The lessons learned register is updated with effective or ineffective approaches to managing stakeholder engagement so that information can be used in the current project or future projects.
- **Stakeholder register.** Described in Section 13.1.3.1. The stakeholder register may be updated based on new information provided to stakeholders about resolved issues, approved changes, and general project status.

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13.4 MONITOR STAKEHOLDER ENGAGEMENT

Monitor Stakeholder Engagement is the process of monitoring project stakeholder relationships and tailoring strategies for engaging stakeholders through modification of engagement strategies and plans. The key benefit of this process is that it maintains or increases the efficiency and effectiveness of stakeholder engagement activities as the project evolves and its environment changes. This process is performed throughout the project. The inputs, tools and techniques, and outputs of the process are depicted in Figure 13-9. Figure 13-10 depicts the data flow diagram for the process.

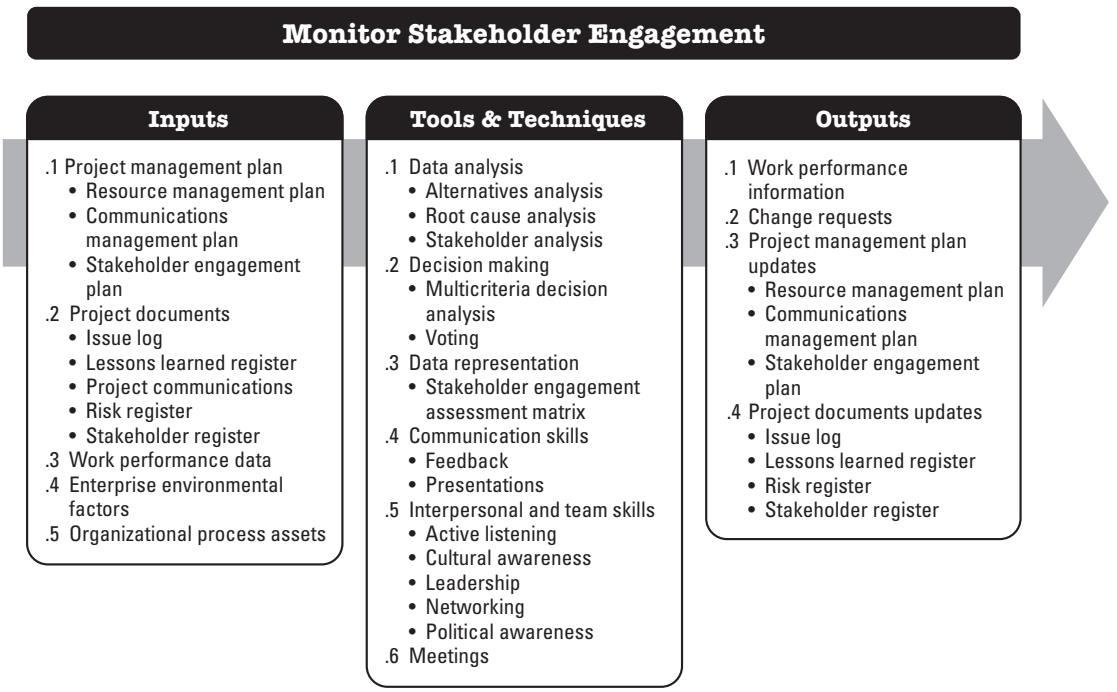

Figure 13-9. Monitor Stakeholder Engagement: Inputs, Tools & Techniques, and Outputs

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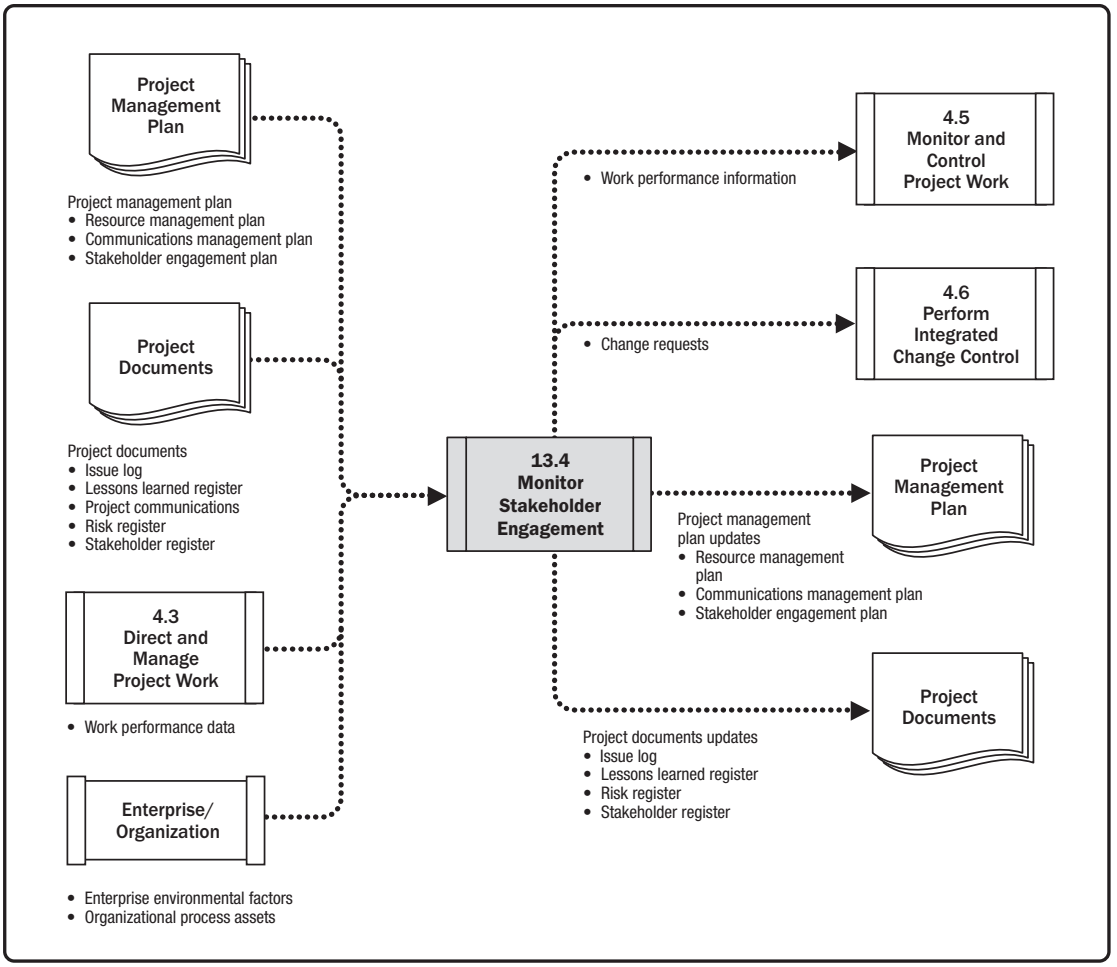

Figure 13-10. Monitor Stakeholder Engagement: Data Flow Diagram

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13.4.1 MONITOR STAKEHOLDER ENGAGEMENT: INPUTS

13.4.1.1 PROJECT MANAGEMENT PLAN

Described in Section 4.2.3.1. Project management plan components include but are not limited to:

- **Resource management plan.** Described in Section 9.1.3.1. The resource management plan identifies the methods for team member management.
- **Communications management plan.** Described in Section 10.1.3.1. The communications management plan describes the plans and strategies for communication to the project's stakeholders.
- **Stakeholder engagement plan.** Described in Section 13.2.3.1. Defines the plan for managing stakeholder needs and expectations.

13.4.1.2 PROJECT DOCUMENTS

Project documents that can be considered as inputs for this process include but are not limited to:

- **Issue log.** Described in Section 4.3.3.3. The issue log documents all the known issues related to the project and stakeholders.
- **Lessons learned register.** Described in Section 4.4.3.1. Lessons learned earlier in the project can be applied in later phases of the project to improve the efficiency and effectiveness of engaging stakeholders.
- **Project communications.** Described in Section 10.2.3.1. These include the project communications that have been distributed to stakeholders as defined in the communications management plan and the stakeholder engagement plan.
- **Risk register.** Described in Section 11.2.3.1. The risk register contains the identified risks for the project, including those related to stakeholder engagement and interactions, their categorization, and list of potential responses.
- **Stakeholder register.** Described in Section 13.1.3.1. The stakeholder register contains stakeholder information that includes but is not limited to stakeholder identification, assessment, and classification.

13.4.1.3 WORK PERFORMANCE DATA

Described in Section 4.3.3.2. Work performance data contains data on project status such as which stakeholders are supportive of the project, and their level and type of engagement.

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13.4.1.4 ENTERPRISE ENVIRONMENTAL FACTORS

The enterprise environmental factors that can influence the Monitor Stakeholder Engagement process include but are not limited to:

- Organizational culture, political climate, and governance framework;
- Personnel administration policies;
- Stakeholder risk thresholds;
- Established communication channels;
- Global, regional, or local trends, practices, or habits; and
- Geographic distribution of facilities and resources.

13.4.1.5 ORGANIZATIONAL PROCESS ASSETS

The organizational process assets that can influence the Monitor Stakeholder Engagement process include but are not limited to:

- Corporate policies and procedures for social media, ethics, and security;
- Corporate policies and procedures for issue, risk, change, and data management;
- Organizational communication requirement;
- Standardized guidelines for development, exchange, storage, and retrieval of information; and
- Historical information from previous projects.

13.4.2 MONITOR STAKEHOLDER ENGAGEMENT: TOOLS AND TECHNIQUES

13.4.2.1 DATA ANALYSIS

Data analysis techniques that can be used for this process include but are not limited to:

- **Alternatives analysis.** Described in Section 9.2.2.5. Alternatives analysis can be used to evaluate options to respond to variances in the desired results of stakeholder engagement.
- **Root cause analysis.** Described in Section 8.2.2.2. A root cause analysis can be used to determine the basic underlying reason that stakeholder engagement is not having the planned effect.
- **Stakeholder analysis.** Described in Section 13.1.2.3. The stakeholder analysis helps to determine the position of stakeholder groups and individuals at any particular time in the project.

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13.4.2.2 DECISION MAKING

Decision-making techniques that can be used for this process include but are not limited to:

- **Multicriteria decision analysis.** Described in Section 8.1.2.4. Criteria for successful stakeholder engagement are prioritized and weighted to identify the most appropriate choice.
- **Voting.** Described in Section 5.2.2.4. Voting can be used to select the best response for a variance in stakeholder engagement.

13.4.2.3 DATA REPRESENTATION

A data representation technique used in this process includes but is not limited to a stakeholder engagement assessment matrix. Described in Section 13.2.2.3. The stakeholder engagement assessment matrix monitors stakeholder engagement through tracking changes in level of engagement for each stakeholder.

13.4.2.4 COMMUNICATION SKILLS

Communication techniques that can be used for this process include but are not limited to:

- **Feedback.** Described in Section 10.2.2.3. Feedback is used to ensure that the information to stakeholders is received and understood.
- **Presentations.** Described in Section 10.2.2.3. Presentations provide clear information to stakeholders.

13.4.2.5 INTERPERSONAL AND TEAM SKILLS

Interpersonal skills to that can be used for this process include but are not limited to:

- **Active listening.** Described in Section 10.2.2.6. Active listening is used to reduce misunderstandings and other miscommunication.
- **Cultural awareness**. Described in Section 10.1.2.6. Cultural awareness and cultural sensitivity help the project manager to plan communications based on the cultural differences and requirements of stakeholders and team members.
- **Leadership.** Described in Section 3.4.4. Successful stakeholder engagement requires strong leadership skills to communicate the vision and inspire stakeholders to support the work and outcomes of the project.
- **Networking.** Described in Section 10.2.2.6. Networking ensures access to information about levels of engagement of stakeholders.
- **Political awareness.** Described in Section 10.1.2.6. Political awareness is used to understand the strategies of the organization, understand who wields power and influence in this arena, and to develop an ability to communicate with these stakeholders.

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13.4.2.6 MEETINGS

Types of meetings include status meetings, standup meetings, retrospectives, and any other meetings as agreed upon in the stakeholder engagement plan to monitor and assess stakeholder engagement levels. Meetings are no longer limited by face-to-face or voice-to-voice interactions. While face-to-face interactions are ideal, they can be expensive. Teleconferencing and technology bridge the gap and provide numerous ways to connect and conduct a meeting.

13.4.3 MONITOR STAKEHOLDER ENGAGEMENT: OUTPUTS

13.4.3.1 WORK PERFORMANCE INFORMATION

Described in Section 4.5.1.3. Work performance information includes information about the status of stakeholder engagement, such as the level of current project support and compared to the desired levels of engagement as defined in the stakeholder engagement assessment matrix, stakeholder cube, or other tool.

13.4.3.2 CHANGE REQUESTS

Described in Section 4.3.3.4. A change request may include corrective and preventive actions to improve the current level of stakeholder engagement. Change requests are processed for review and disposition through the Perform Integrated Change Control process (Section 4.6).

13.4.3.3 PROJECT MANAGEMENT PLAN UPDATES

Any change to the project management plan goes through the organization's change control process via a change request. Components of the project management plan that may require a change request include but are not limited to:

- **Resource management plan.** Described in Section 9.1.3.1. Team responsibilities for stakeholder engagement activities may need to be updated.
- **Communications management plan.** Described in Section 10.1.3.1. The project's communication strategies may need to be updated.
- **Stakeholder engagement plan.** Described in Section 13.2.3.1. Information about the project's stakeholder community may need to be updated.

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13.4.3.4 PROJECT DOCUMENTS UPDATES

Project documents that may be updated as a result of carrying out this process include but are not limited to:

- **Issue log.** Described in Section 4.3.3.3. Information in the issue log indicates stakeholder attitudes and may need to be updated.
- **Lessons learned register.** Described in Section ~~4.3.3.1~~. The lessons learned register is updated with information on challenges and how they could have been avoided. It is also updated with approaches that worked well for engaging stakeholders optimally, and those that did not work well.
- **Risk register.** Described in Section 11.2.3.1. The risk register may need to be updated with responses to stakeholder risks.
- **Stakeholder register.** Described in Section 13.1.3.1. The stakeholder register is updated with information as a result of monitoring stakeholder engagement.

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