

# Stakeholder Analysis Planner: Project

## WHY USE THIS TOOL:

To get into the minds of your managers and employees!  
To hone in on the “why” of your project! To unearth the  
true business benefits of your tech transformation!

## HOW TO USE THIS TOOL:

Work through the tasks with the appropriate people  
(described within).

# Stakeholder Analysis: To-Do List

FOLLOW THE INSTRUCTIONS BELOW TO CREATE A CONSOLIDATED REPORT-OUT DOCUMENT THAT HONES IN ON YOUR PROJECT BENEFITS, RESISTANCES AND MORE

- 1) **First, review the following pages** to familiarize yourself with the categories and types of information you'll be looking for.
- 2) **Next, schedule and conduct your Stakeholder interviews.** These will be informal, 30-minute conversations that help you hone in on the “why” of your project. They'll also help you identify possible resistances or risks to your project – as well as possible themes, patterns or opportunities to harness! (Who to interview? Get a broad perspective ... talk to everyone from Senior Leadership and Project Team members to Managers and Employees. Does your project affect external audiences in any way? Talk to them too!)
- 3) **Next, after your interviews are complete, read through your interview notes and highlight common themes of each question.** What are consistencies among opinions? Where are people resisting? What sorts of patterns do you see?
- 4) **Finally, migrate your interview data** into the categories and pages of the Report-Out document (pages 5-9).
- 5) **Share your findings with your broader project team and Senior Leadership.** This helps everyone get on the same page in terms of the appropriate level of Change Management you may need!

# Stakeholder Interviews: Questions

USE THE QUESTIONS BELOW AS A GUIDE; TWEAK / EDIT TO MATCH YOUR PROJECT OR CULTURE!

ALLOT 30 MINUTES FOR EACH INTERVIEW. SUGGESTED INTERVIEWEES INCLUDE: SENIOR LEADERSHIP, PROJECT TEAM MEMBERS, BUSINESS MANAGERS AND EMPLOYEES WHO WILL BE AFFECTED

- 1) What's your name? Describe a day in your life at COMPANY...
- 2) What do you think are our company's competitive strengths?
- 3) In one or two words, describe our company culture...
- 4) What inspires you about working here? What gets you up in the morning?
- 5) On the flip side, if you could change one thing about working here, what would it be?
- 6) Now, let's talk about the upcoming tech implementation... describe the upcoming project in your own words...
- 7) How will the new systems / processes be different from what we currently use?
- 8) What will be some specific benefits to the business?
- 9) What are some resistances people might have to the new processes / systems?
- 10) If this project were an animal, what kind of animal would it be? **(CHANGE TIP: THIS QUESTION IS GREAT TO GET PEOPLE TALKING ABOUT THE PROJECT AS A METAPHOR ... IT UNEARTHS UNIQUE INSIGHTS TO HOW PEOPLE ARE FEELING ABOUT THE PROJECT AT AN EMOTIONAL LEVEL)**
- 11) If you had to describe this project to your 10-year-old child (or your Grandmother, etc.), how would you describe it? **(CHANGE TIP: THIS QUESTION HELPS PEOPLE TALK ABOUT THE PROJECT AT ITS MOST BASIC ... SOMETIMES THIS HELPS YOU FIND SIMPLE LANGUAGE FOR COMPLEX CHANGES)**
- 12) On a scale of 1-10, how excited are you about this upcoming project? Now, why didn't you choose a LOWER number? **(CHANGE TIP: THIS METHOD IS HELPFUL FOR RESISTANT CULTURES. FOR EXAMPLE, IF AN INTERVIEWEE ISN'T EXCITED ABOUT THE PROJECT, THEY MIGHT CHOOSE A TWO OR A THREE ... ASKING THEM WHY THEY DIDN'T CHOOSE "1" OR EVEN "ZERO" HELPS THEM UNEARTH REASONS WHY THE PROJECT IS NECESSARY)**
- 13) Anything else you'd like to share about how we can make this project a success?

# Stakeholder Analysis: The Report-Out

ALL YOUR INTERVIEWS COMPLETED? GREAT! NOW YOU'RE READY TO MOVE INTO COMPILING YOUR REPORT-OUT DOCUMENT!

- 1) Remember, after your interviews are complete, **the first thing to do is read through your interview notes and highlight common themes**. What are consistencies among opinions? Where are people resisting? What are people supporting? What kinds of patterns do you see?
- 2) Next, **migrate your interview data** into the categories and pages of the Report-Out document that follow. You'll see pages that cover your Project Goals & Employee Insights, Key Message Recommendations and, even, Project Name and Tagline Options (if applicable).
- 3) If available, **pull in your project team members to work through these pages together** – brainstorm Key Messages and consistent language or the personality you want your project to embody. Reach out to Subject Matter Experts or other Project Leaders if you need help filling in the blanks. Remember, this document is helping you hone in on HOW you want to talk about your project ... and WHY people should care!
- 4) Finally, **share your findings with your broader project team and Senior Leadership**. This helps everyone get on the same page in terms of the appropriate level of Change Management you may need ... and sets the stage for future communications!

# Project Goal #1: LIST GOAL HERE

<b>COMMON THEMES:</b> Did multiple people have similar answers to questions? That's a common theme!	<b>OPPORTUNITIES:</b> What sorts of opportunities could you tap into based on the common themes you're hearing?	<b>CHALLENGES / GAPS:</b> On the flip side, what gaps might need to be addressed in order to create a successful project?
List consistent themes and/or quotes here...	List opportunities to harness here...	List gaps to address here...
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**[LOOK TO YOUR PROJECT CHARTER TO MAP STAKEHOLDER INPUT  
AGAINST YOUR STATED PROJECT GOALS OR OBJECTIVES]**

# Project Goal #2: LIST GOAL HERE

COMMON THEMES: Did multiple people have similar answers to questions? That's a common theme!	OPPORTUNITIES: What sorts of opportunities could you tap into based on the common themes you're hearing?	CHALLENGES / GAPS: On the flip side, what gaps might need to be addressed in order to create a successful project?
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# Project Goal #3: LIST GOAL HERE

COMMON THEMES: Did multiple people have similar answers to questions? That's a common theme!	OPPORTUNITIES: What sorts of opportunities could you tap into based on the common themes you're hearing?	CHALLENGES / GAPS: On the flip side, what gaps might need to be addressed in order to create a successful project?
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# Key Messages

KEY MESSAGES	BENEFITS	SPECIFIC TECHNOLOGY
Look to slides 5-7 for the most compelling themes / quotes; these make great Key Messages! (Insert that language here)	List benefits that quantify or qualify your Key Message; how does this message really help a Manager or employee? (Insert that language here)	Does a specific technology upgrade or process change apply to this Key Message and intended Benefit? Connect the dots! (Insert that language here)
Look to slides 5-7 for the most compelling themes / quotes; these make great Key Messages! (Insert that language here)	List benefits that quantify or qualify your Key Message; how does this message really help a Manager or employee? (Insert that language here)	Does a specific technology upgrade or process change apply to this Key Message and intended Benefit? Connect the dots! (Insert that language here)
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**[FIND PATTERNS IN YOUR “EMPLOYEE INSIGHTS” ON SLIDES 5-7;  
INSERT THAT LANGUAGE HERE INTO YOUR KEY MESSAGES]**



# Project Name / Tagline Options

PROJECT NAME OPTIONS	TAGLINE OPTIONS	LOGO / VISUAL IDEAS
What words did you hear repeated often? That's a great place to start with name brainstorming!	Is there a simple sentence that people used to describe the essence of your project?	What "visualizes" this idea? What is the "picture" of your project or your future success? Have fun thinking of visuals...
Brainstorm name ideas here...	Brainstorm tagline ideas here...	What "visualizes" this idea?
Brainstorm name ideas here...	Brainstorm tagline ideas here...	What "visualizes" this idea?
Brainstorm name ideas here...	Brainstorm tagline ideas here...	What "visualizes" this idea?
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Brainstorm name ideas here...	Brainstorm tagline ideas here...	What "visualizes" this idea?

[ONCE YOU HAVE YOUR KEY MESSAGES IDENTIFIED, PERHAPS A COMMON WORD OR THEME RISES TO THE TOP? BRAINSTORM PROJECT NAME OPTIONS HERE!]