The Stakeholder Management Framework

for teams, programs, and portfolios

Drew Jemilo
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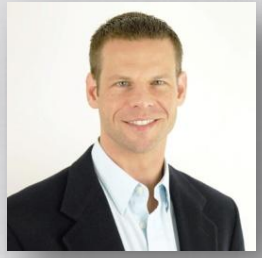

Scaled Agile Framework™

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SCALED AGILE

Agenda

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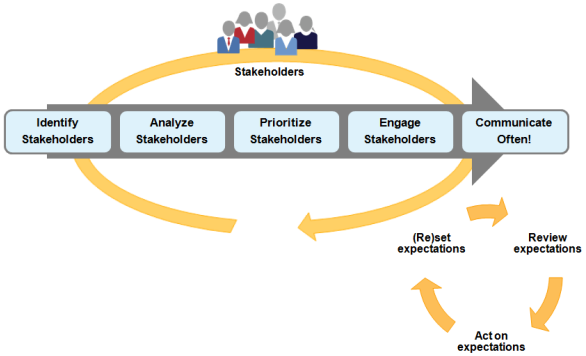
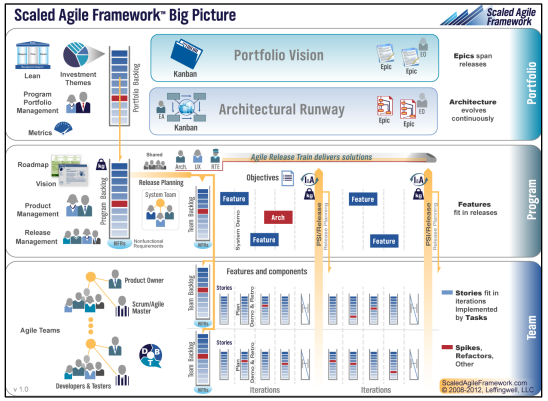
2. Stakeholder Management Overview
3. Identify Stakeholders
4. Analyze Stakeholders
5. Prioritize Stakeholders
6. Engage Stakeholders
7. Communicating
8. Managing Expectations
9. Scaling





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Introductions

Drew Jemilo

- **Over 20 years** in software engineering and product management as an external consultant and internal IT Director
- **Practicing** traditional, adaptive, and agile methods since 1989
- **Worked with companies** ranging from Lean startups to $1B international enterprises
- **Principal Contributor** to the Scaled Agile Framework
- **Instructor** for the Scaled Agile Academy

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Stakeholder Management Overview

Pop Quiz

The term “stakeholders” refers to...

A. The people chasing the vampires in *Twilight*

B. The ones eating prime rib with their hands in the Old Hickory Steakhouse

C. Those who have the interest and influence to impact your product, program, team, or project

D. All of the above.

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The Challenge

Why is stakeholder management so difficult?

There's misalignment

- Conflicting priorities
- Unshared vision

There are politics

- "I want to win!"
- History of conflict
  - Product Management vs. Development – "I want it now"
  - The Business vs. Architecture – "We can't afford to invest in architecture"

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The Challenge

Why is stakeholder management so difficult?

You may be the messenger...

- At some point, you will need to give bad new
- You will need to say no

And your stakeholders will change over time

- At any given point, you may not know who they all are
- We need a systematic approach to identify and prioritize

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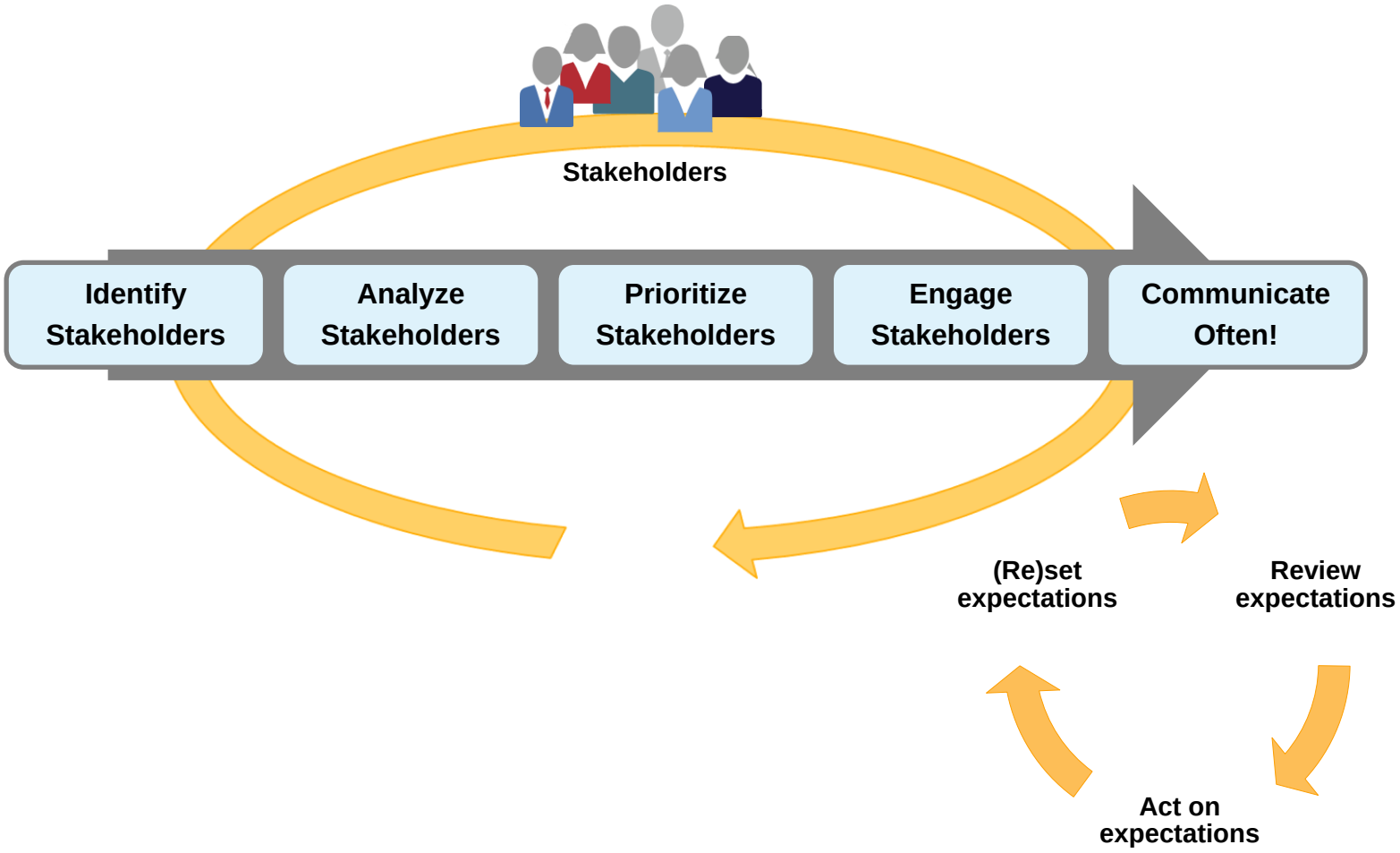
The Stakeholder Management Process



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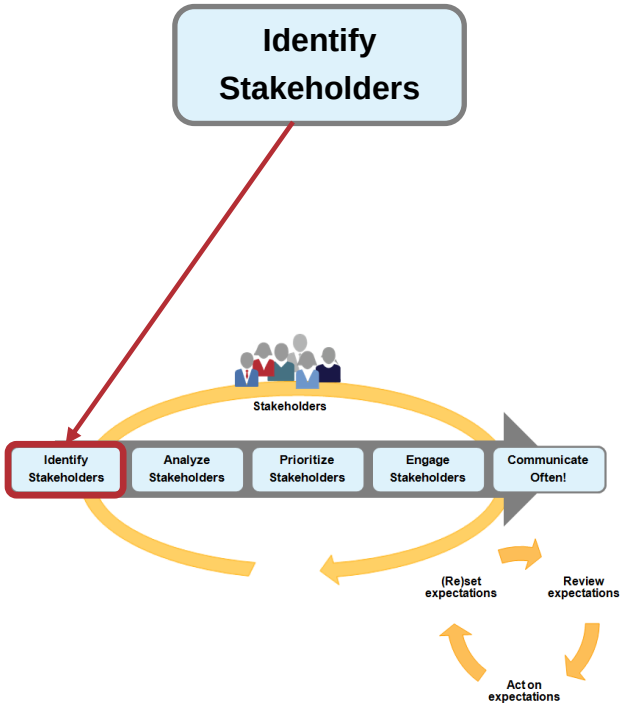
Identify Stakeholders



Identify Stakeholders

Many of your stakeholders may not initially be obvious

Consider those who have...

- The ability to impact your project
- The ability to enhance your project (SMEs)
- The ability to slow down your projects (e.g., teams or groups you depend on)
- The ability to remove impediments
- The ability to lead opinions
- The ability to facilitate the change resulting from your project
- The ability to provide “a voice of reason”

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Identify Stakeholders

Some may easily be overlooked

Don’t forget external influences

- Subcontractors
- Suppliers
- Competitors
- Regulatory agencies

Remember those who have to live with the solution

- IT Ops
- Production support

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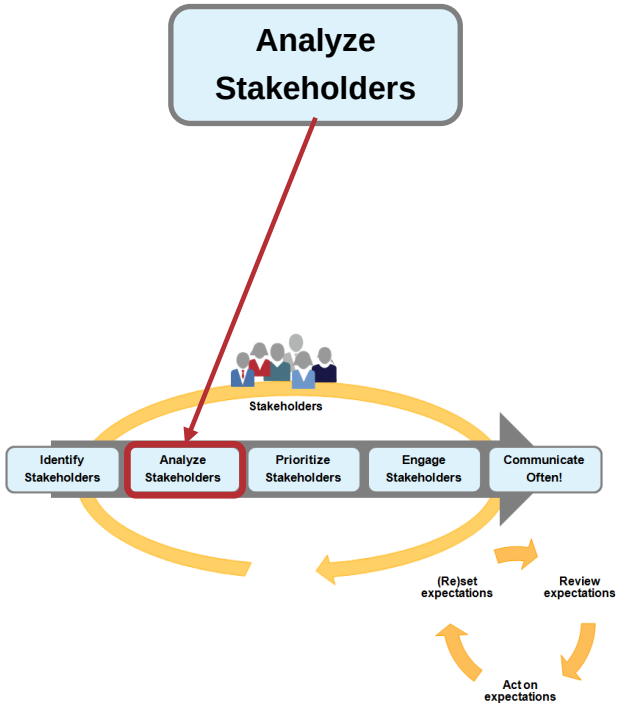
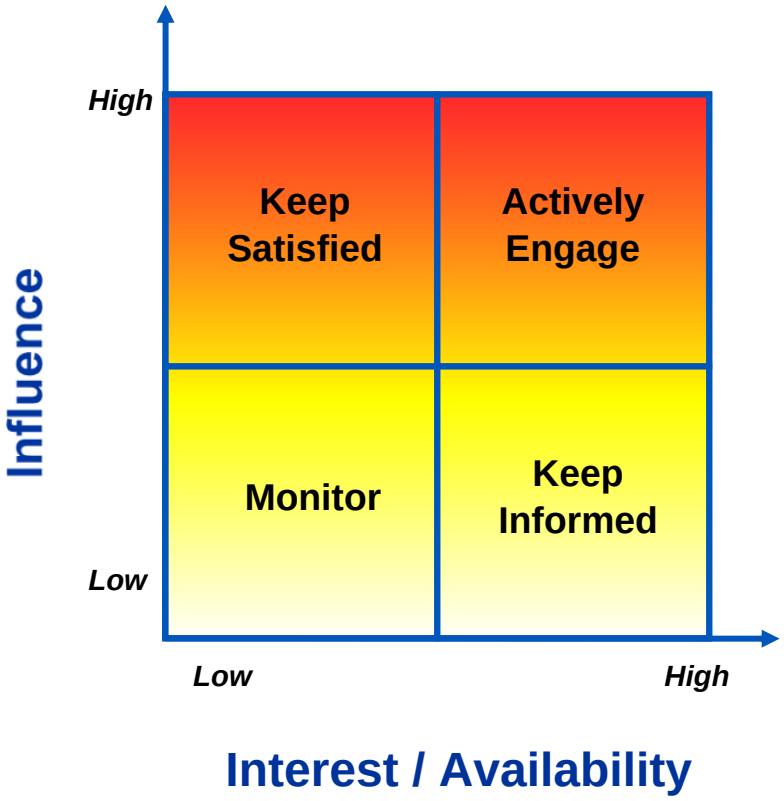
Analyze Stakeholders



The Stakeholder Map



What is it?

- Provides a framework for managing stakeholders based on interest and influence
- Y-axis sometimes labeled “Power” (but can be a charged term)
- X-axis sometimes just labeled “Interest” (but who likes to be thought of as disinterested?)

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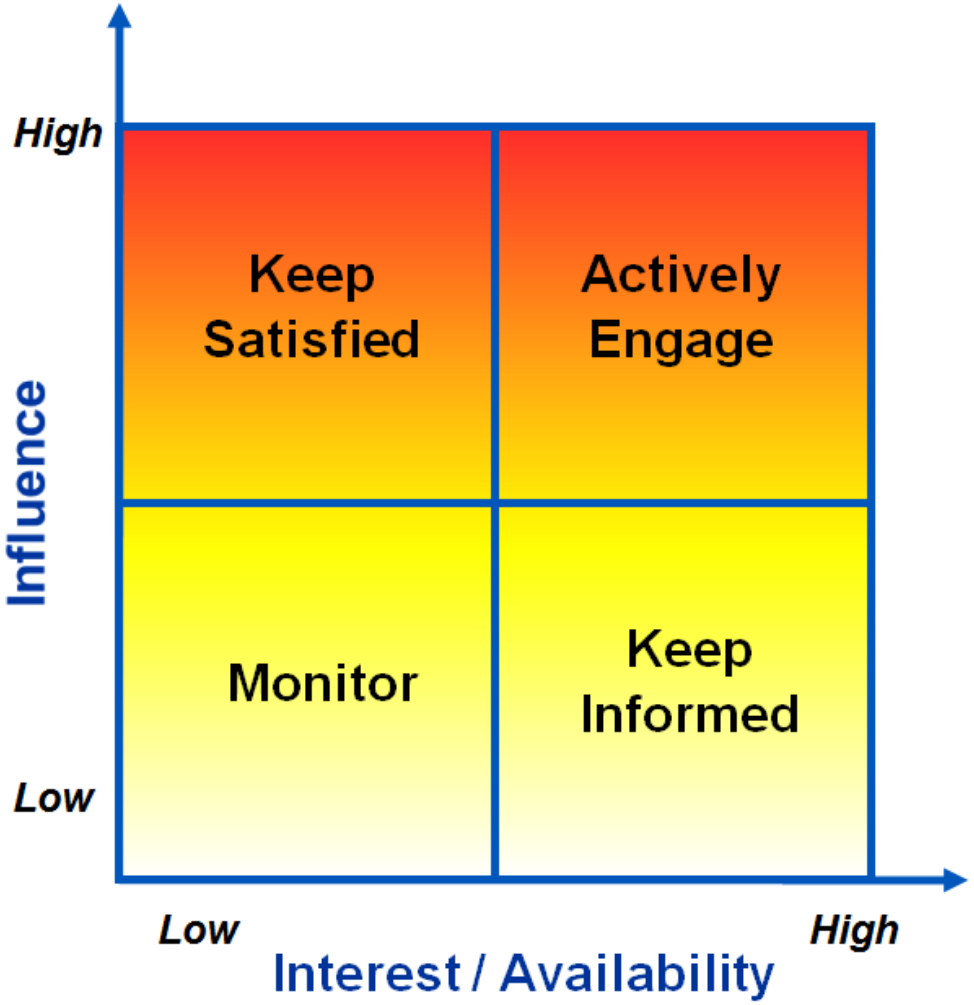
The Stakeholder Map



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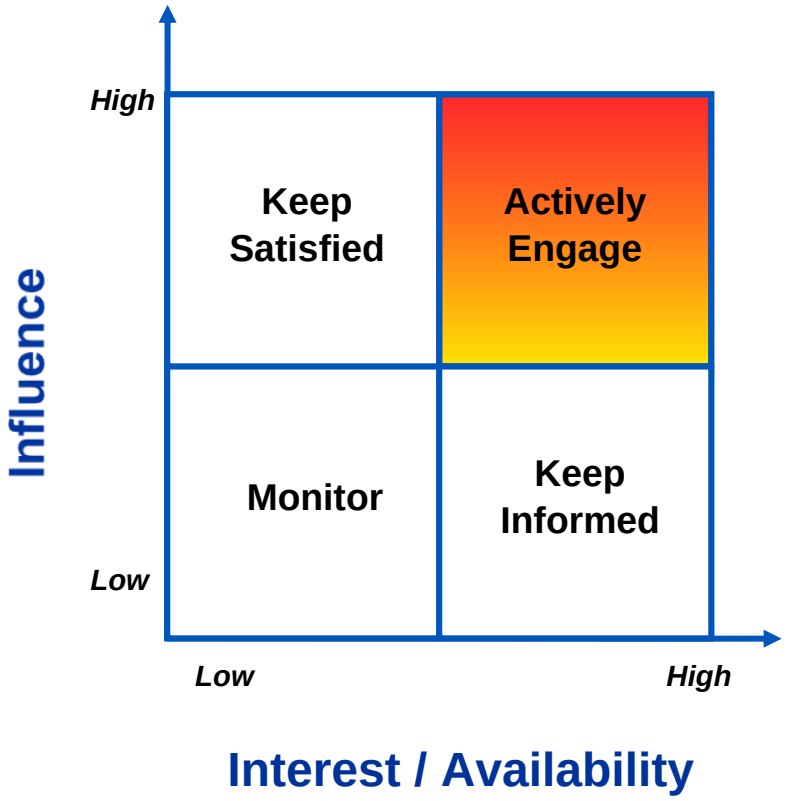

High Influence High Interest

- Business owners and others with significant decision-making authority
- Typically easy to identify
- Can kill, sustain, or nurture the project
- They're typically easy to actively engage. Set up consistent touch points.

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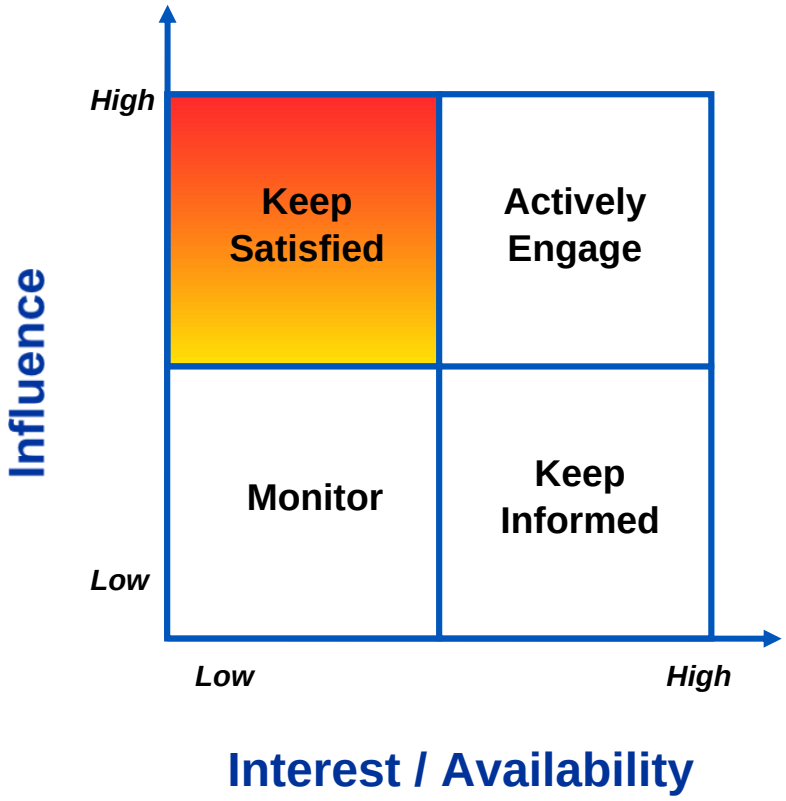
The Stakeholder Map



High Influence Low Interest

- Those with significantly decision-making authority
- Lacks the availability or interest to be actively engaged
- It is usually difficult to have consistent touch points. Do whatever is needed to keep them satisfied.

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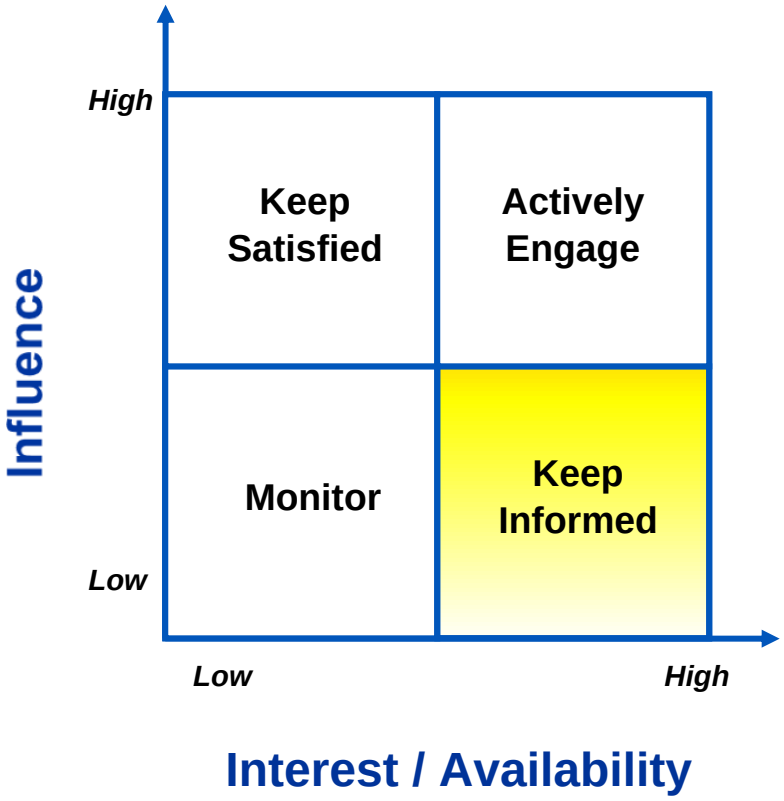
The Stakeholder Map



Low Influence High Interest

- May be impacted by the project but have little influence
- May want more of your time than you can give
- Find efficient ways to communicate and keep them informed
  - Email updates
  - Presentations
  - Publicity campaigns

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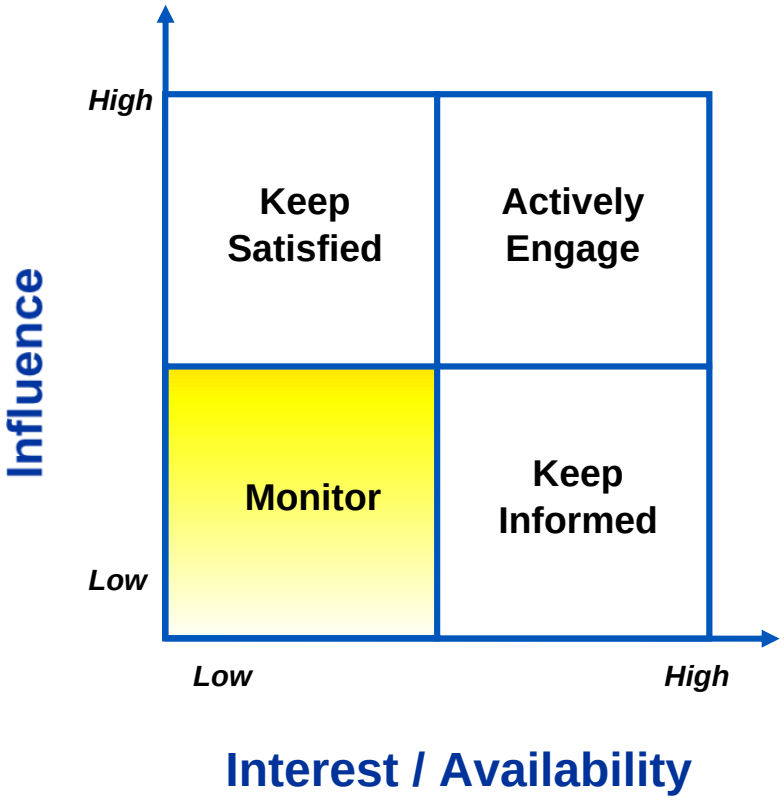
The Stakeholder Map



Low Influence
Low Availability

- They aren't (and don't expect to be) significantly involved
- They may not even be aware of your project... and may not want another email in their inbox!
- Know who they are
- Monitor them and be aware if they move into other quadrants

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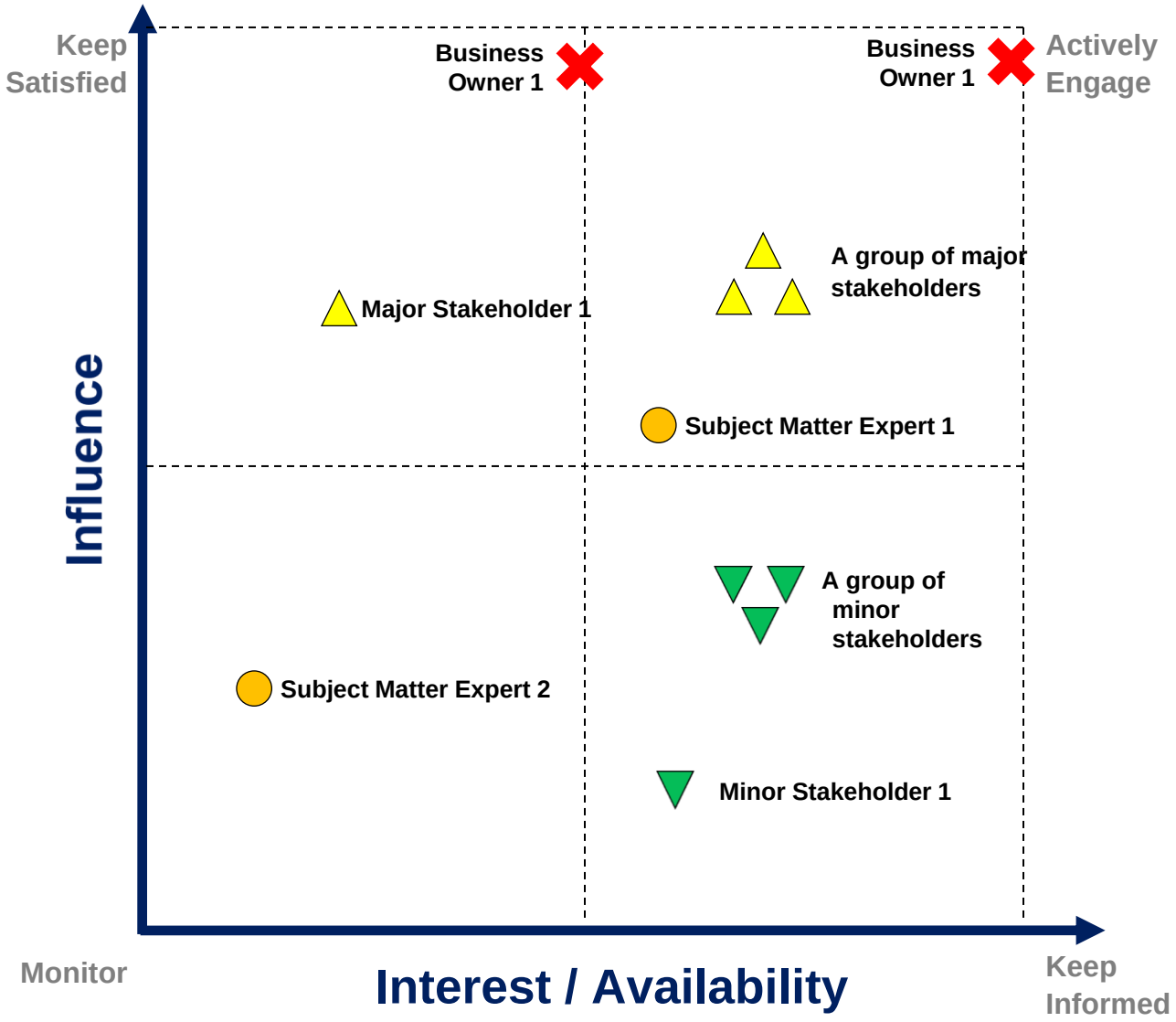
The Stakeholder Map



Key

- Business Owner
- Major Stakeholder
- Minor Stakeholder
- Subject Matter Expert

- Business owners and major stakeholders must participate in Release Planning and the PSI Inspect & Adapt workshops to review and agree upon the PSI plan and the planned vs. actual progress
- Major stakeholders should also be involved in the System Sprint Demos
- Major stakeholders may be engaged between System Sprint Demos for input
- Minor Stakeholders are engaged as required in order to keep them informed
- Subject Matter Experts are engaged as required for input

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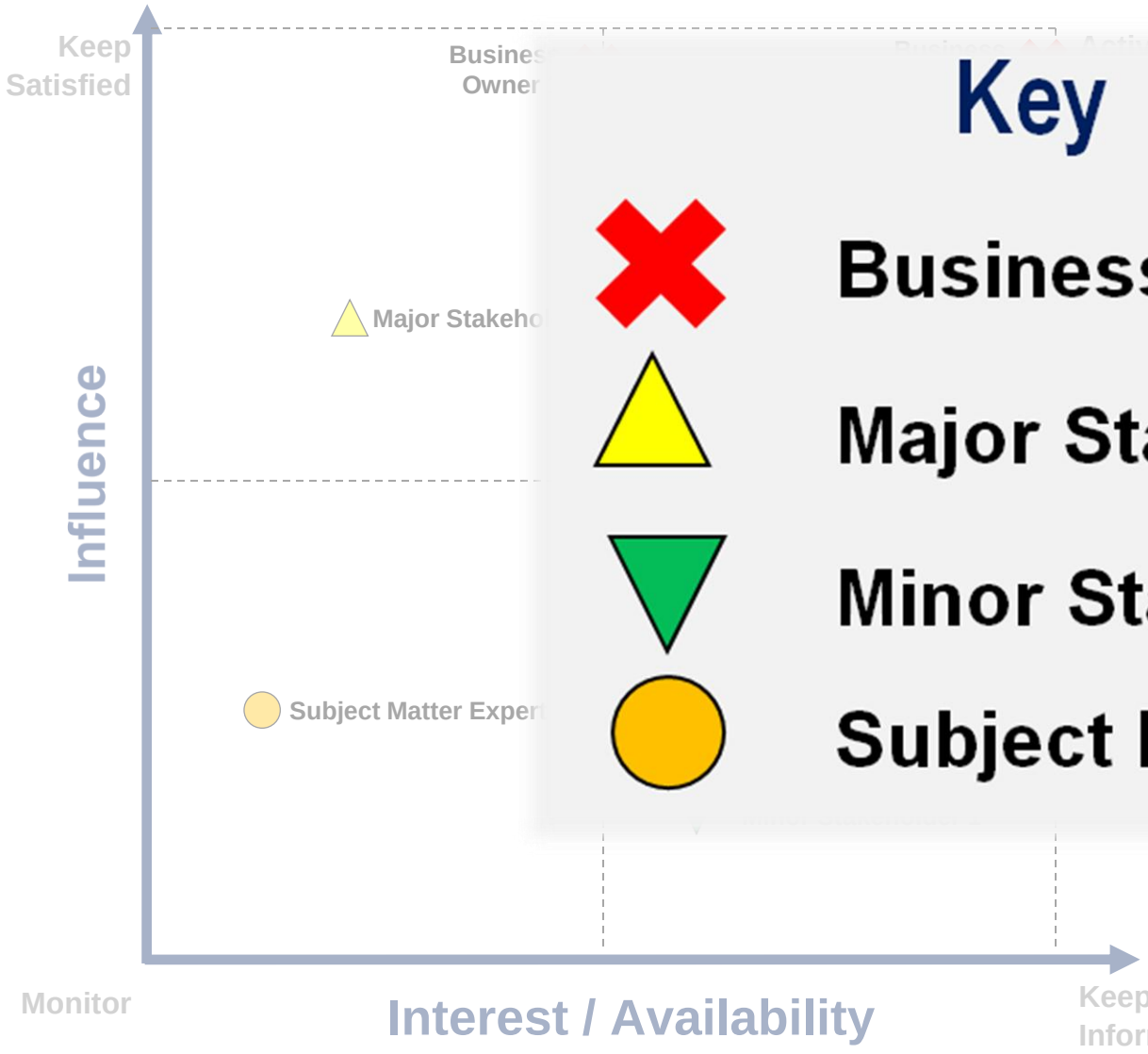
The Stakeholder Map



- Minor Stakeholders are engaged as required in order to keep them informed
- Subject Matter Experts are engaged as required for input

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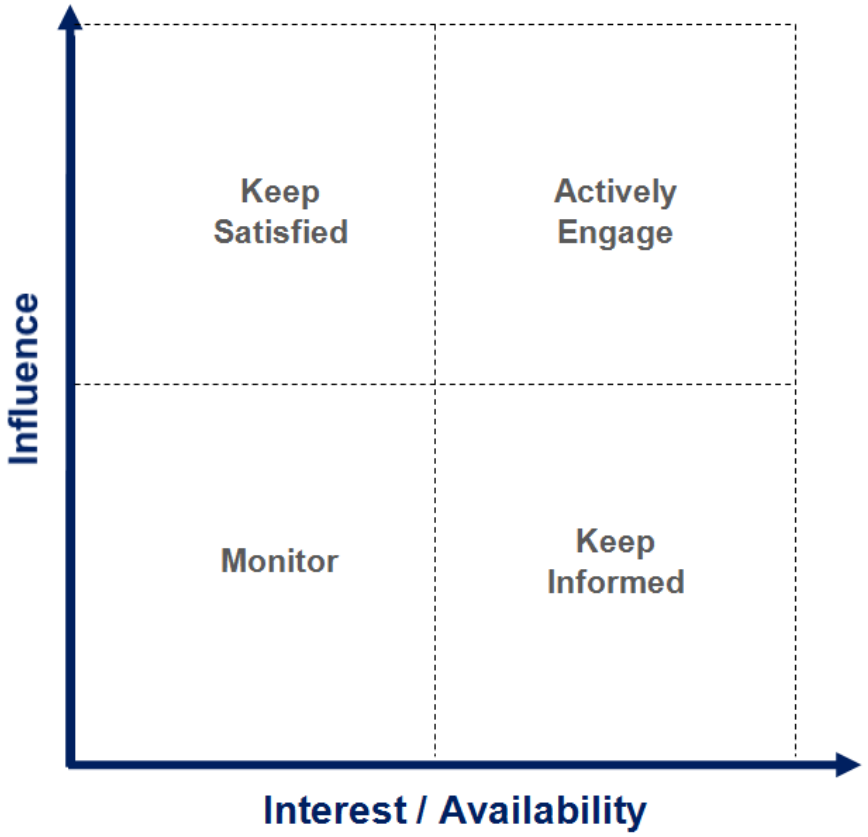
Exercise: Create Your Stakeholder Map

Using flip chart paper and stickies, create a stakeholder map for your team (Product Owner) or program (Product Manager)

Color Coding

Red	= Business Owner
Yellow	= Major Stakeholder
Green	= Minor Stakeholder
Orange	= Subject Matter Expert



Timebox:
20 minutes

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Prioritize Stakeholders

Don’t prioritize based on who can scream the loudest!

It’s...

- Role
- Influence
- Interest/availability

It’s also their perception and attitude

- Listen to them
- Get context from others
- Conduct an NPS survey

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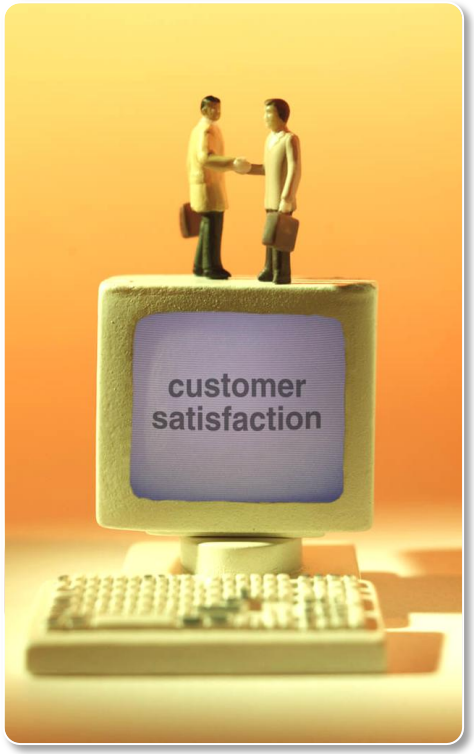
Stakeholder Satisfaction with NPS

Net Promoter Score is a survey technique which is gaining strong acceptance

- Net Promoter Score (NPS) is a survey technique which:
  - Gauges loyalty
  - Is very simple
  - Is an alternative to traditional customer satisfaction surveys



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Stakeholder Satisfaction with NPS

An NPS survey consists of one simple question

- **How likely is it that you would recommend _____ ?**
- On a scale of 0 – 10:
  - 9 - 10 are Promoters
  - 7 - 8 are Passives
  - 0 - 6 are Detractors

NPS = (% of Promoters) – (% of Detractors)

- A positive NPS is considered good
- 50 or more is considered excellent

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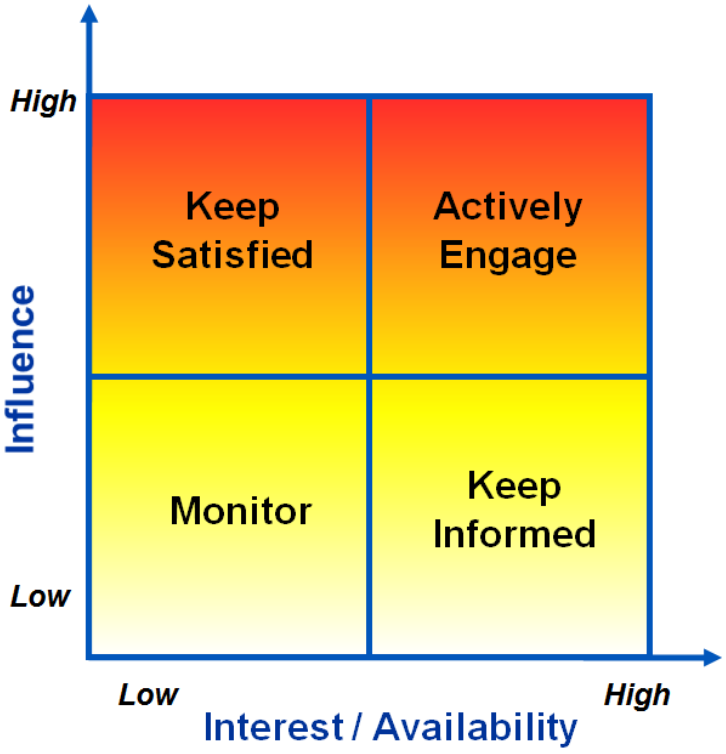
The Stakeholder Map and NPS

Can NPS be an overlay on your stakeholder map?



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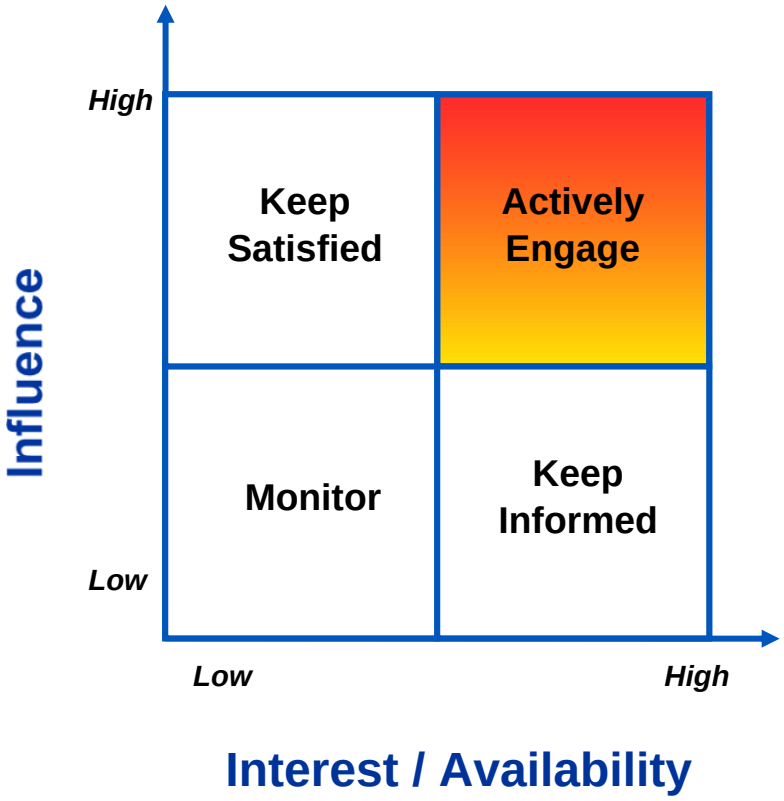

Promoters may...

- Protect you from politics and negative influences
- Remove impediments
- Secure incremental funding
- Sway opinions in a positive direction

Keep them close!

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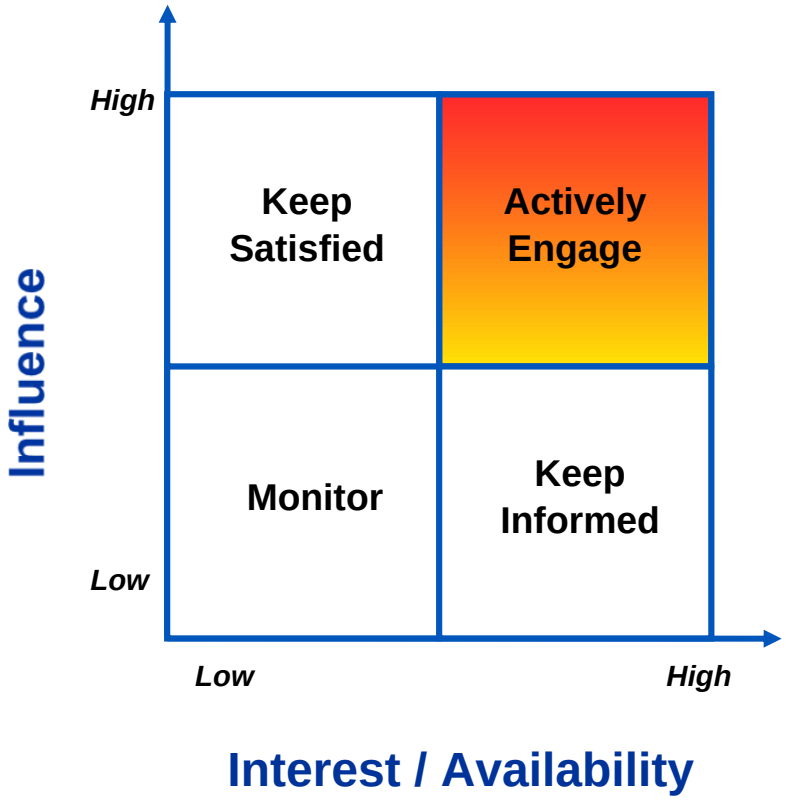
The Stakeholder Map



Detractors may...

- Find faults
- Delay approvals
- Provide little support
- Be overly controlling
- Reassign resources
- Sway opinions in a negative direction
- Start a competing project
- Pull the plug!

Keep them closer!

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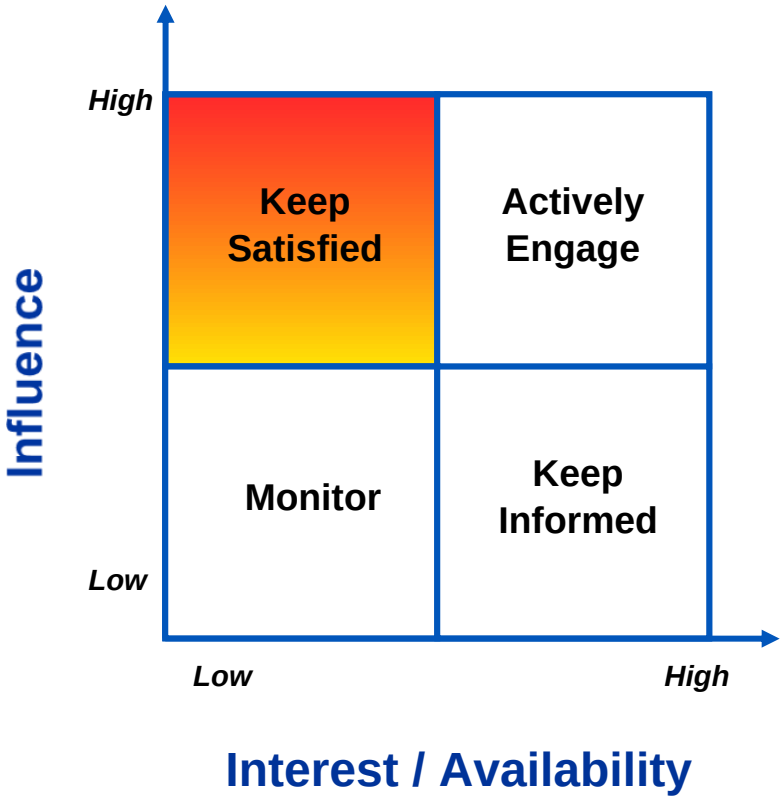
The Stakeholder Map



Promoters may...

- Become more interested and available

Detractors may...

- Avoid you
- Delay feedback
- Delay approvals (intentionally or unintentionally)
- Drop in, give unexpected feedback, and leave

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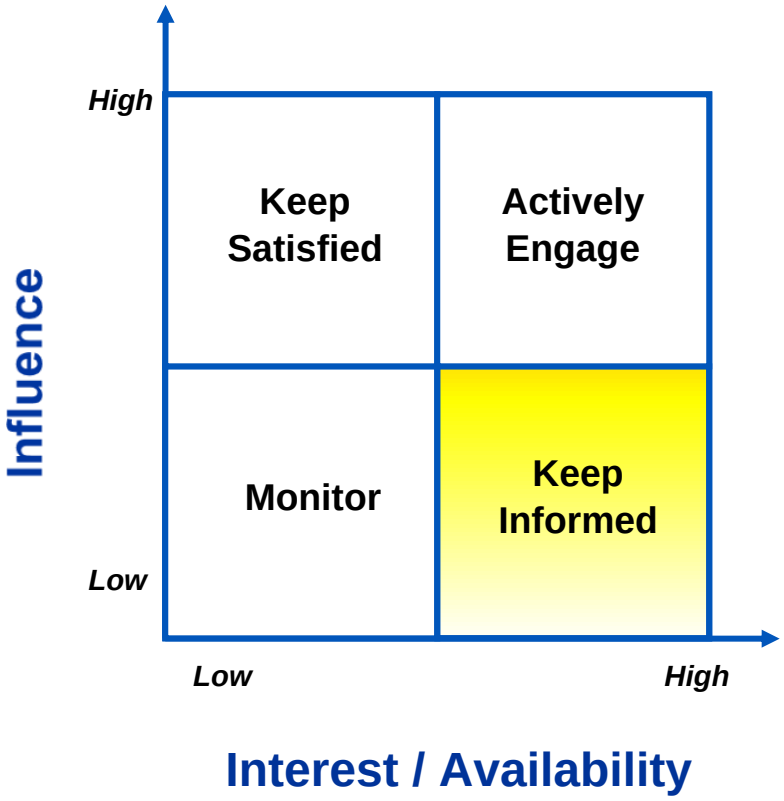
The Stakeholder Map



Promoters may...

- Sway opinions in a positive direction
- Want to become even more involved

Detractors may...

- Sway opinions in a negative direction

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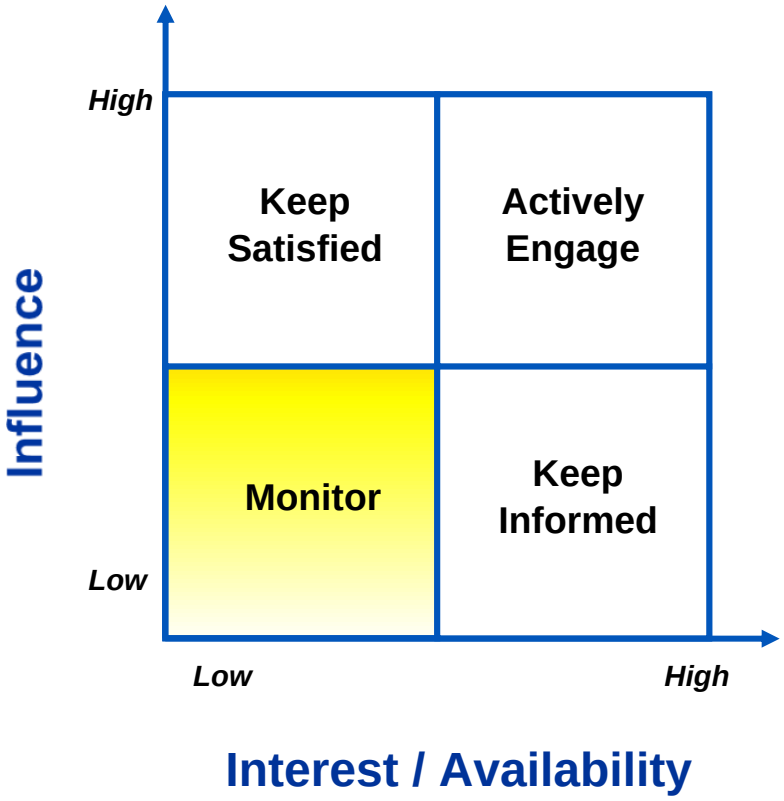
The Stakeholder Map



Promoters may...

- Move to another quadrant

Detractors may...

- Excuse themselves from the water cooler when the topic of your project comes up

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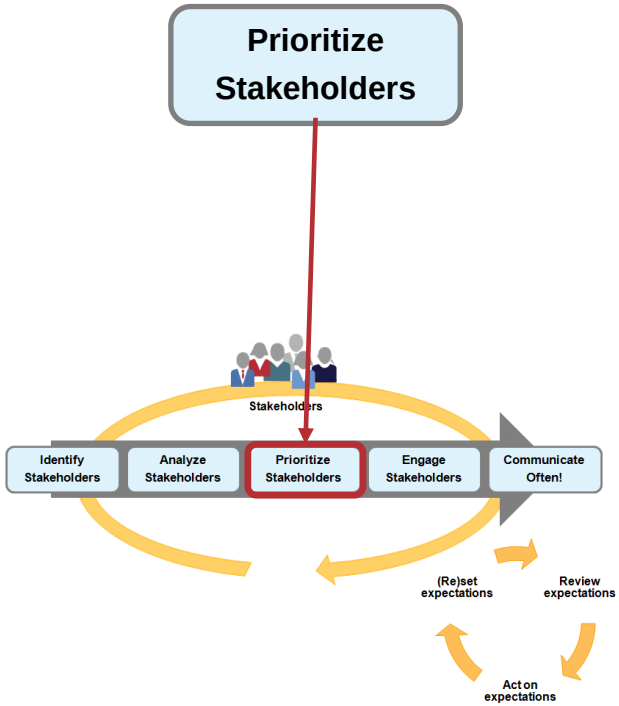
Prioritize Stakeholders



Backlog of Stakeholders

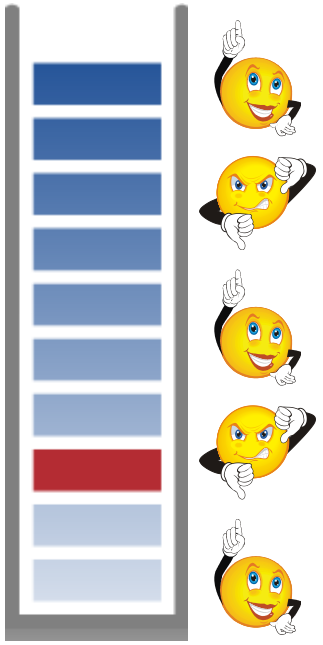
Prioritizing stakeholders is like grooming a backlog: it happens continuously

Considerations:

- Influence (not just power)
- Interest/availability
- Attitude

And also...

- Time value (needed this sprint? This release?)



Stakeholders need grooming too!

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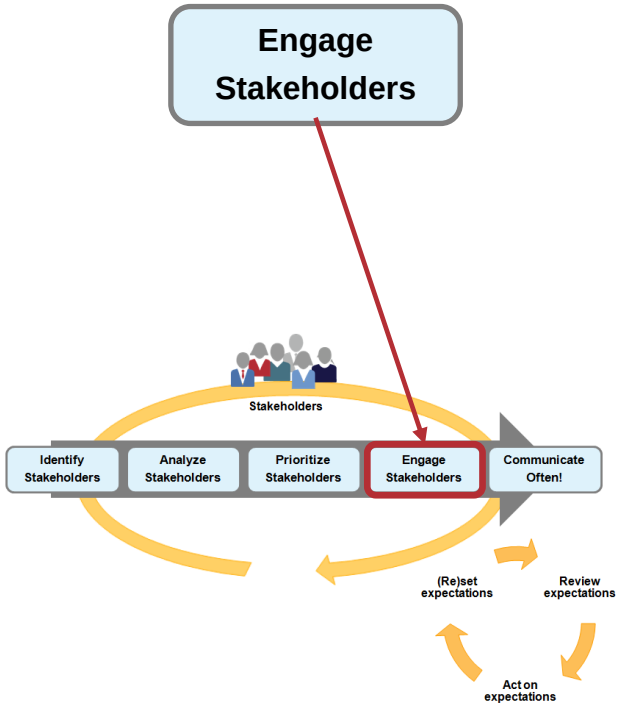
Engage Stakeholders



Engaging Stakeholders

Now that we've identified our stakeholders, we need to define how we'll be interacting with them

- Determine your touch points
  - One-on-one conversations
  - Standing meetings
  - Scrum ceremonies and SAFe program events
  - Workshops
- Define the objectives
- Set the frequency

Role	Person/Group	Samples – Engagement Methods / Frequency
Business Owner	Bob Ollis	• One-on-one meetings to discuss vision, roadmap, and features prior to each release planning meeting • Attendance at requirements workshops as needed • Attendance at the release planning meeting • Attendance at the PSI Inspect & Adapt workshop • Email communication when program scope is at risk
Major Stakeholder	Mary Smith	• Attendance at discover workshops • Preview of the prioritized backlog prior to the release planning meeting • Attendance at the PSI Inspect & Adapt workshop as needed • Attendance at the system sprint demo • Attendance at the team sprint demo (optional) • Email communication when sprint or program scope is at risk
Minor Stakeholder	Mike Schnitzel	• Email updates as needed • Attendance at requirements workshops as needed
Subject Matter Expert	Sam M. Edwards	• Pulled into sprint ceremonies as needed • Pulled into individual or group SME meetings as needed

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Sample Stakeholder Management Plan

A stakeholder map can drive the type and frequency of interactions, e.g., one-on-one conversations, invitations to ceremonies/events, and workshops

Role	Person/Group	Samples – Engagement Methods / Frequency
Business Owner	Bob Ollis	• One-on-one meetings to discuss vision, roadmap, and features prior to each release planning meeting • Attendance at requirements workshops as needed • Attendance at the release planning meeting • Attendance at the PSI Inspect & Adapt workshop • Email communication when program scope is at risk
Major Stakeholder	Mary Smith	• Attendance at discover workshops • Preview of the prioritized backlog prior to the release planning meeting • Attendance at the PSI Inspect & Adapt workshop as needed • Attendance at the system sprint demo • Attendance at the team sprint demo (optional) • Email communication when sprint or program scope is at risk
Minor Stakeholder	Mike Schnitzel	• Email updates as needed • Attendance at requirements workshops as needed
Subject Matter Expert	Sam M. Edwards	• Pulled into sprint ceremonies as needed • Pulled into individual or group SME meetings as needed

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Exercise: Draft Your Plan

Draft your stakeholder management plan for your team (Product Owners) or program (Product Managers)

Role	Person/Group	Engagement Methods / Frequency
Business Owner		
Major Stakeholder		
Subject Matter Expert		
Minor Stakeholder		

Timebox:
20 minutes

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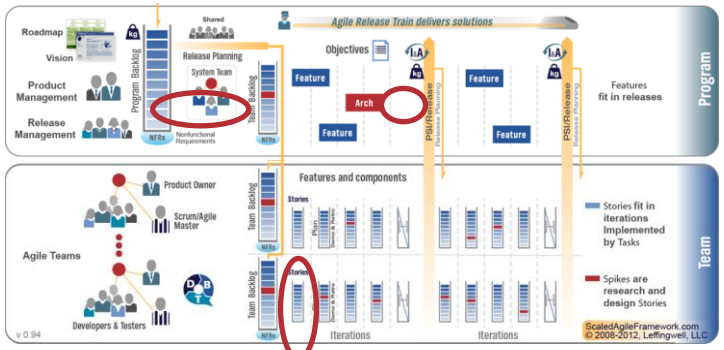
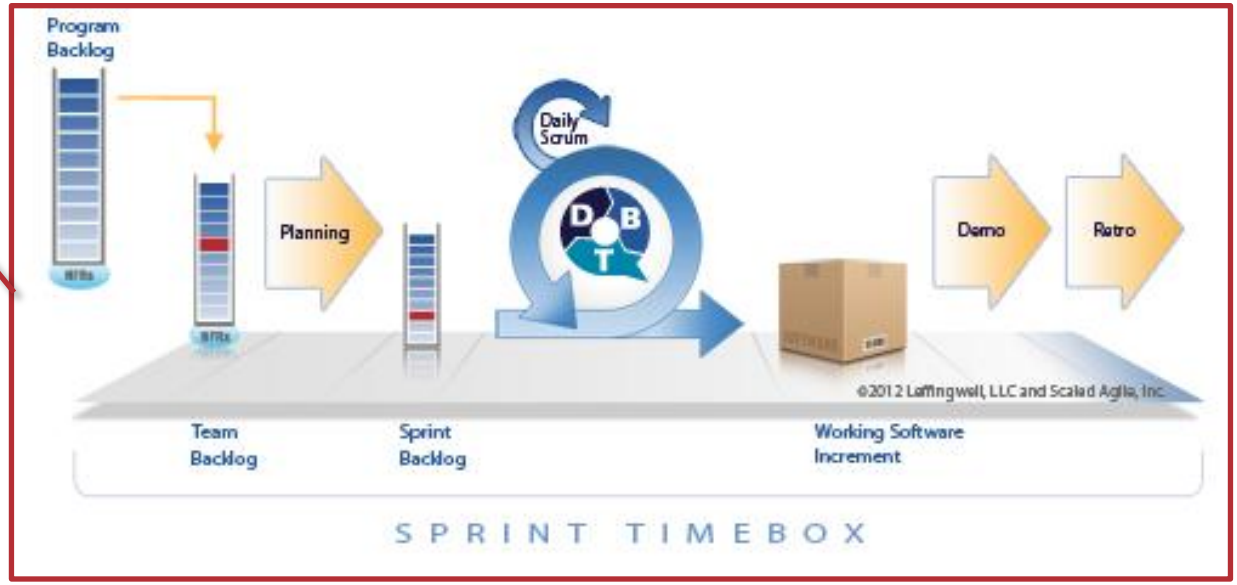
Stakeholder Touch Points

In agile at scale, stakeholders are engaged at the portfolio, program, and team levels.



Let's first focus at the team level



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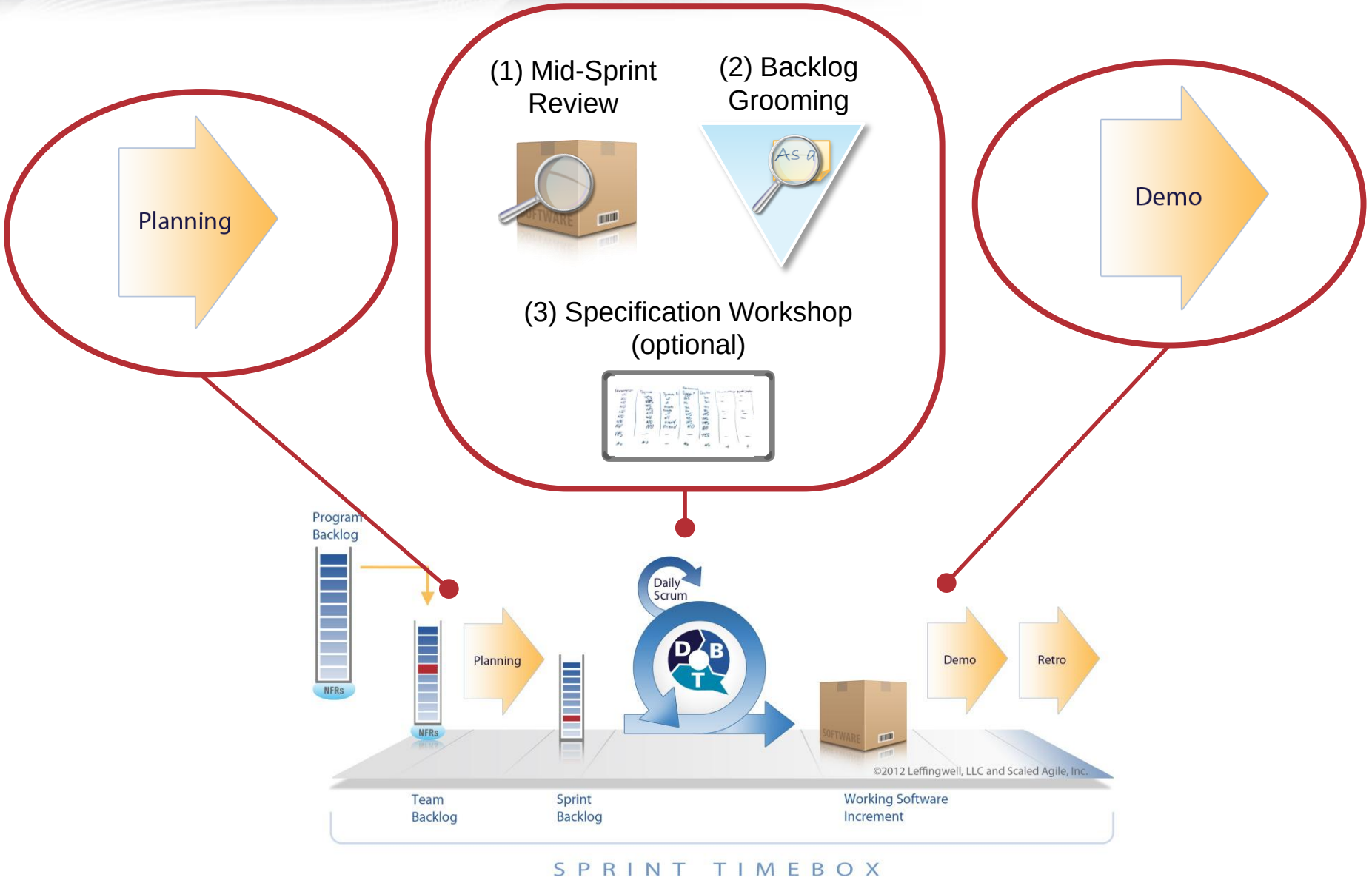
Stakeholder Touch Points



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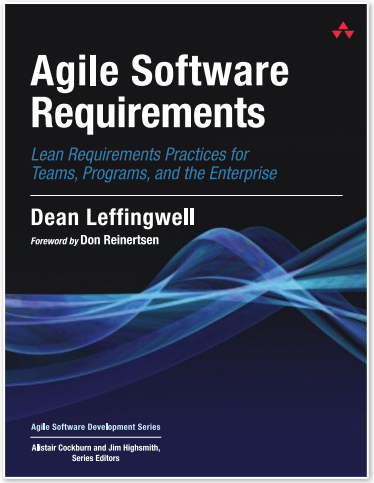
Other Ways to Engage Your Stakeholders

Don’t forget many of the traditional tools as well!

- A Requirements Workshop
- Brainstorming Sessions
- Interviews
- Questionnaires
- User Experience Mock-Ups
- Use Case Modeling



See *Agile Software Requirements: Lean Requirements Practices for Teams, Programs and the Enterprise*. Leffingwell, Dean. Addison-Wesley, 2011.

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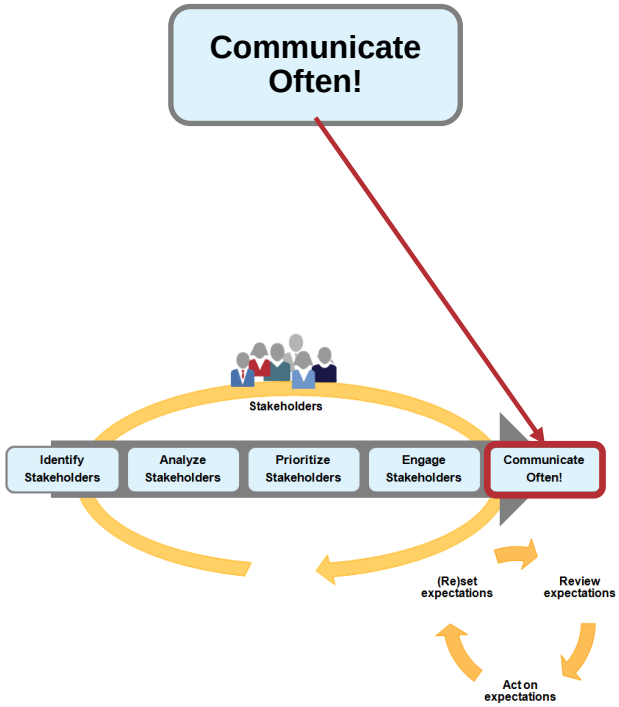
Communicate Often!



Start with Rights and Responsibilities

Stakeholders not only have rights in an Agile environment, but responsibilities as well.

Rights

- Have an engaged team
- Be informed of the team's progress
- Receive good-faith estimates
- Be educated on technical and architectural factors that impact estimates
- Receive Lean|Agile training and coaching

Responsibilities

- Remain engaged from the definition to the completion of the Epic
- Provide ongoing feedback and support
- Define and clarify requirements
- Collaborate with the Product Owner
- Contribute to the growth of a trusting Agile environment

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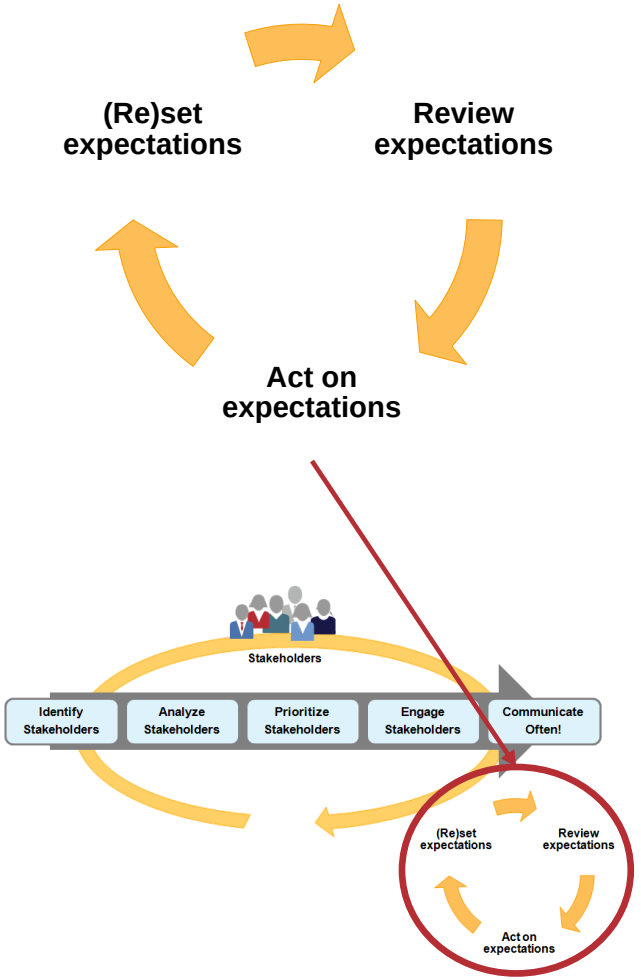
Managing Expectations



Managing Expectations

Managing expectations can be challenging, especially in an Agile world

Be prepared for questions from those not familiar with Agile

- "What do you mean you can't commit to what I'm getting six months from now?"
- "Can you squeeze it in? It's really small."
- "Why are you wasting time on architecture and refactoring?"
- *What else?*

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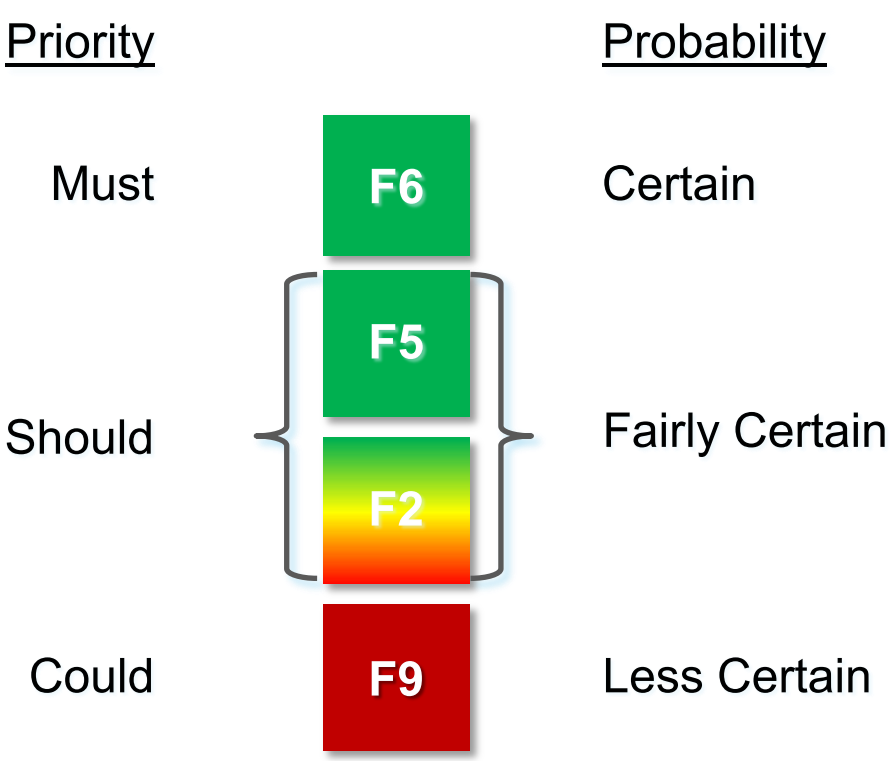
Managing Expectations

With negotiable scope, you'll need to set expectations with your stakeholders

Prioritized Feature Set



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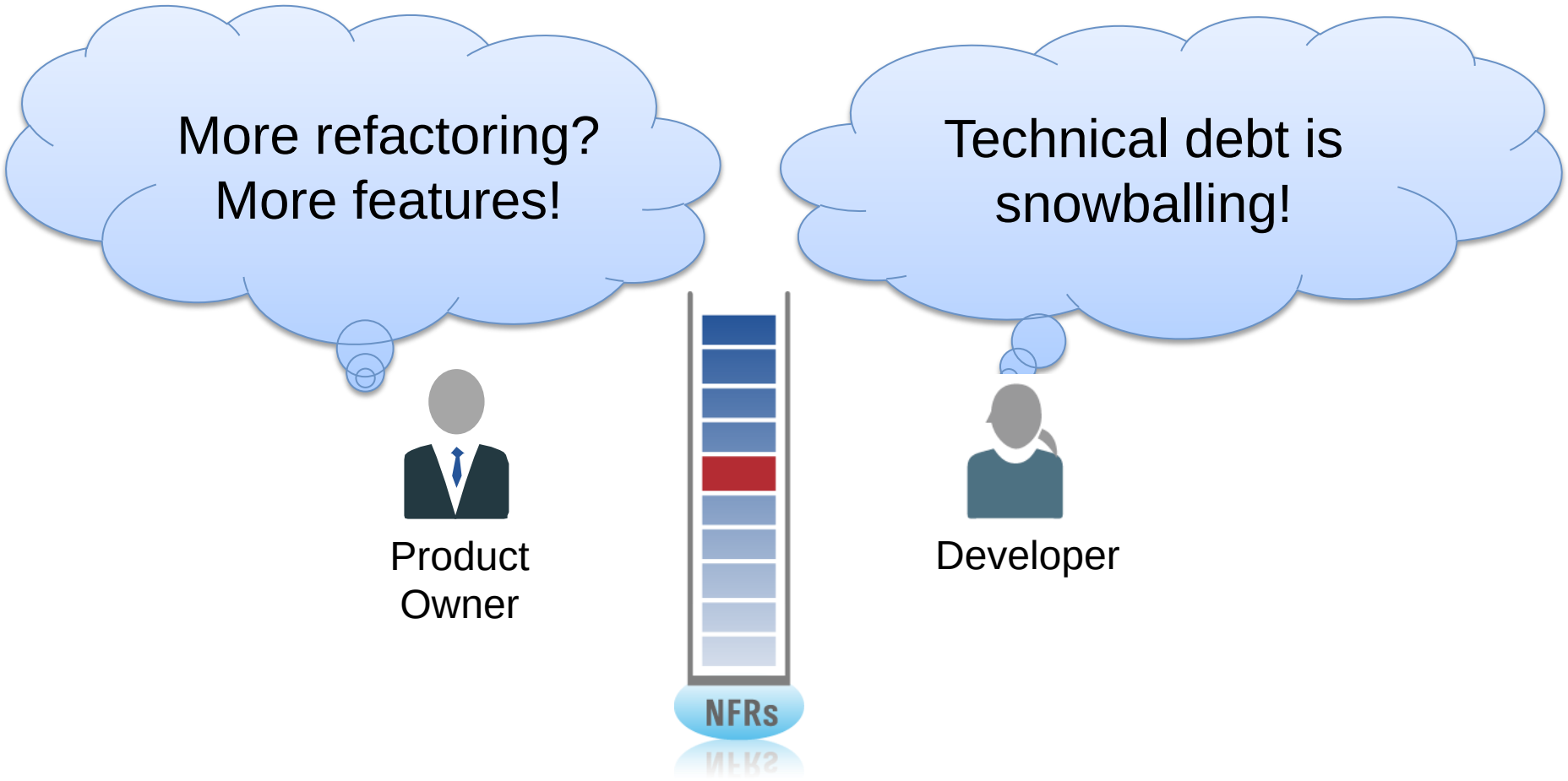
How Do You Achieve a Healthy Balance

There is always a struggle when prioritizing features against technical investments and debt reduction. How do you prioritize unlike things?



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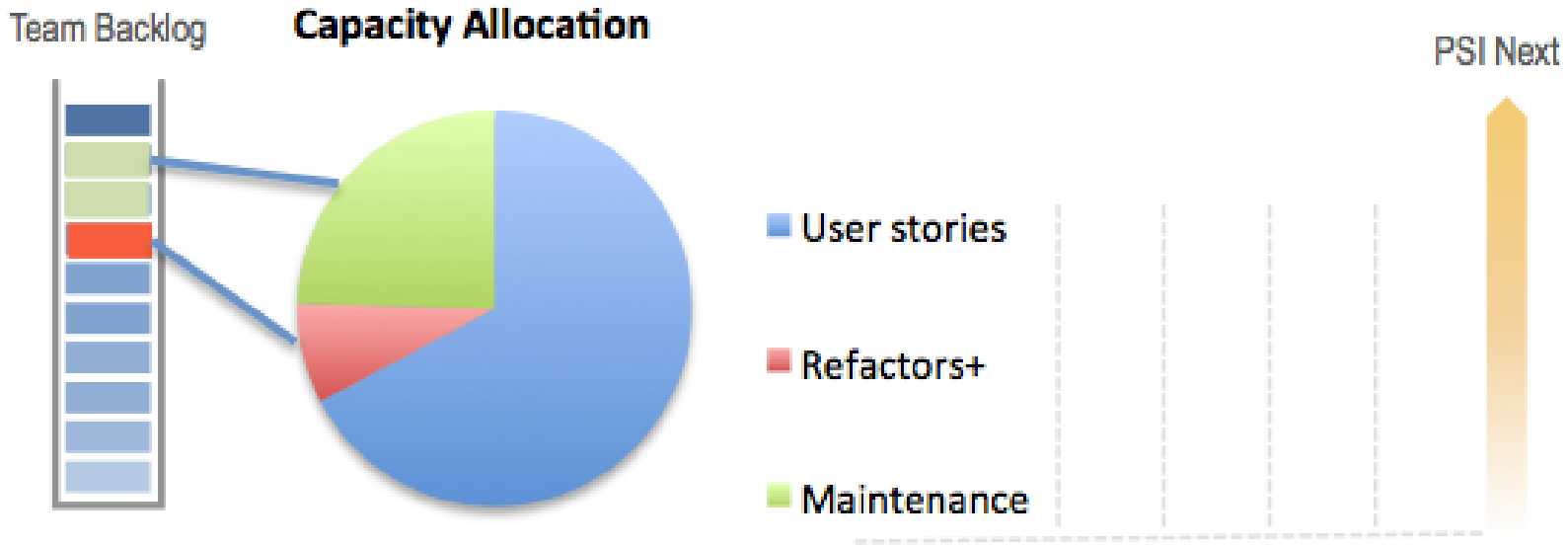
Capacity Allocation for a Healthy Balance

Capacity allocation can be applied to team backlogs for a balanced allocation of resource to users stories, refactors, and maintenance



More...

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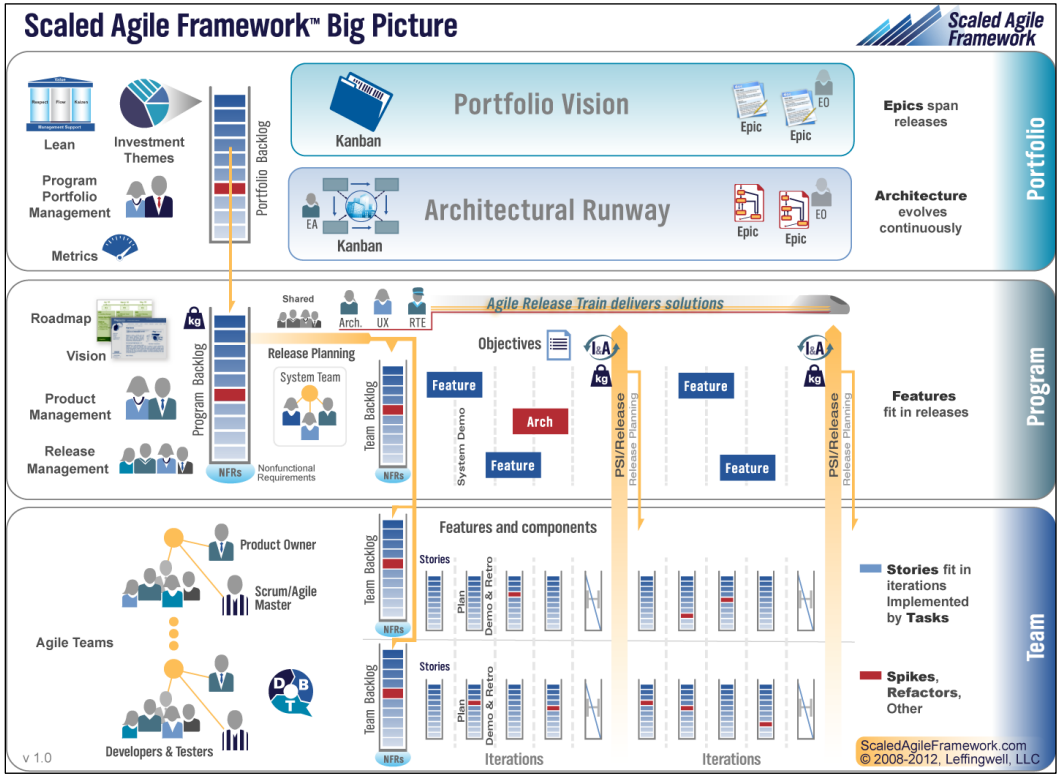
Scaling

The Scaled Agile Framework (SAFe)

The Scaled Agile Framework is a proven, publicly-facing framework for applying Lean and Agile practices at enterprise scale



- Well defined in books and on the web
- Synchronizes vision, planning, interdependencies, and delivery of many teams
- Works well for teams of 50 – 100 people
- Has been scaled to hundreds of teams and thousands of people
- For more info, see ScaledAgileFramework.com

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Scaled Agile Framework™ Big Picture

Scaled Agile Framework

Portfolio

Lean

Investment Themes

Program Portfolio Management

Metrics

Portfolio Backlog

Kanban

Portfolio Vision

Epic

Epic

EO

Epics span releases

EA

Kanban

Architectural Runway

Epic

Epic

EO

Architecture evolves continuously

Program

Roadmap

Vision

Product Management

Release Management

Program Backlog

NFRs

Nonfunctional Requirements

Shared

Arch.

UX

RTE

Agile Release Train delivers solutions

Release Planning

System Team

Team Backlog

NFRs

Objectives

I&A

kg

Feature

Arch

Feature

System Demo

PSI/Release

Release Planning

Feature

Feature

I&A

kg

PSI/Release

Release Planning

Features fit in releases

Team

Agile Teams

Product Owner

Scrum/Agile Master

Developers & Testers

D B T

Team Backlog

NFRs

Features and components

Stories

Plan

Demo & Retro

Team Backlog

NFRs

Stories

Plan

Demo & Retro

Iterations

Iterations

Stories fit in iterations Implemented by **Tasks**

Spikes, **Refactors**, Other

v 1.0

ScaledAgileFramework.com
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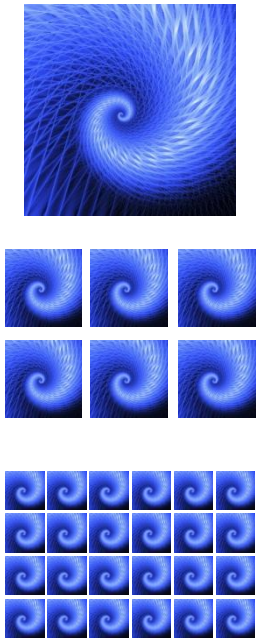
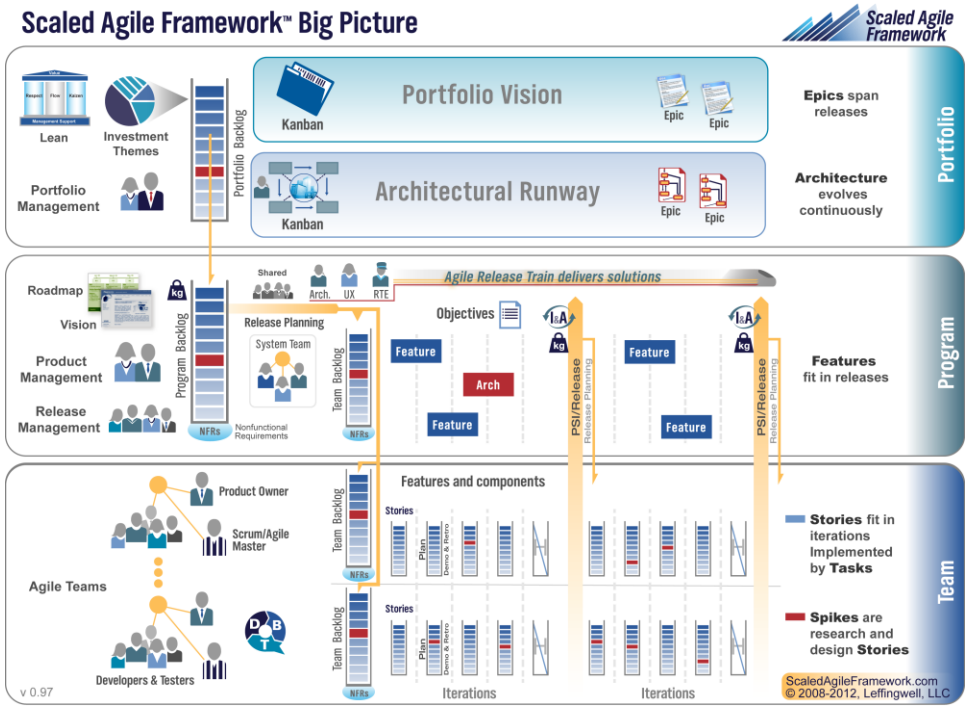
The SAFe Fractal

Each level of the Scaled Agile Framework is a fractal of the one below





A fractal is a complex geometric pattern exhibiting self-similarity in that small details of its structure viewed at any scale repeat elements of the overall pattern

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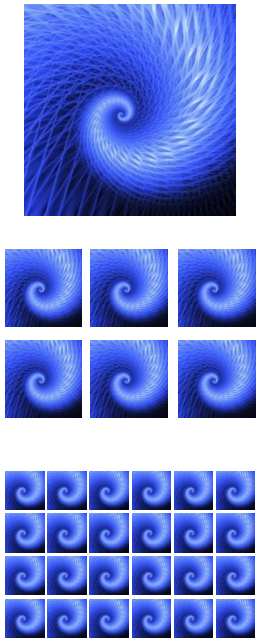
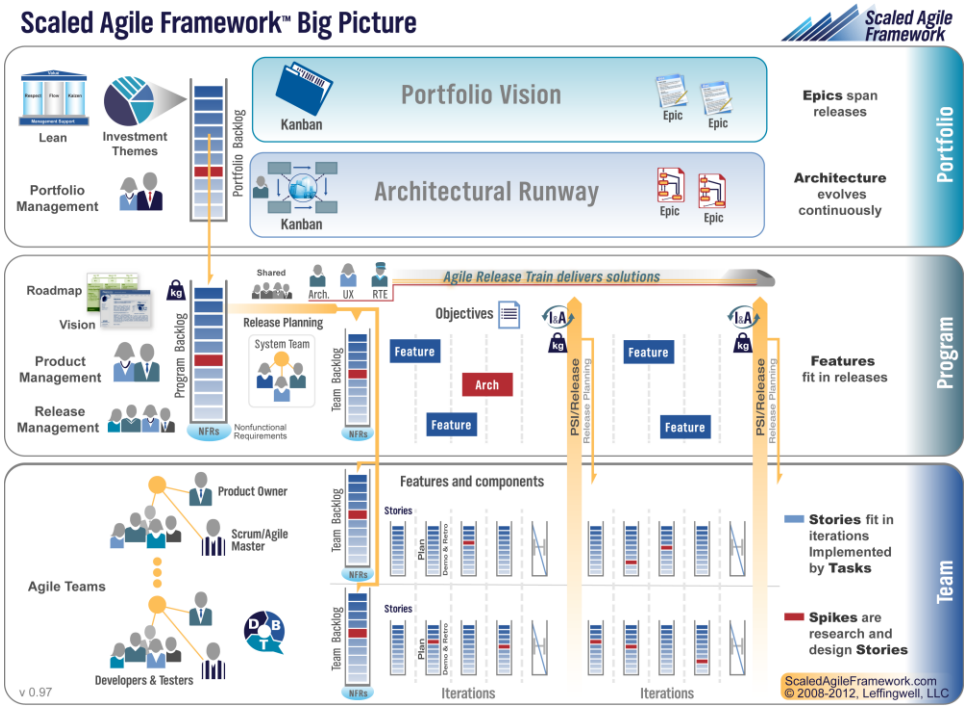
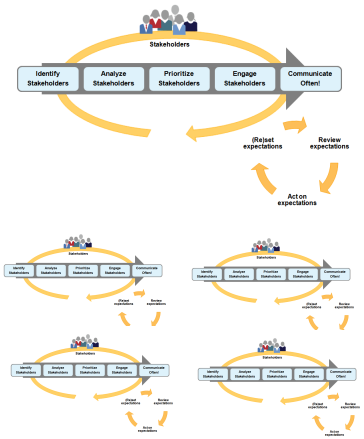
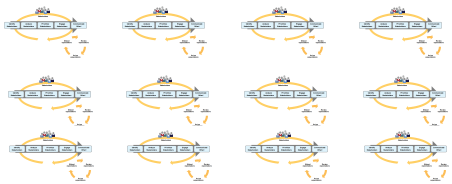
The Stakeholder Management Fractal

We can apply the stakeholder management framework we just learned to each level of the Scaled Agile Framework









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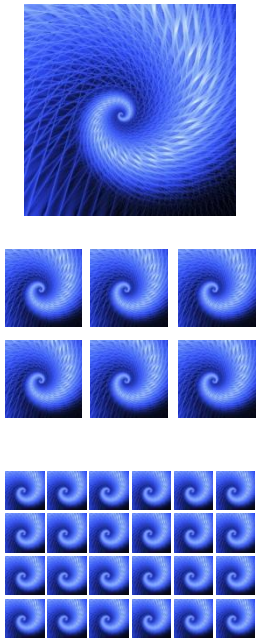
Scaling Facets

In scaling the stakeholder management framework, there are five areas to apply the scaling fractal



1. **Roles**
   Who is the stakeholder manager?
2. **Stakeholders**
   Who has the influence and interest?
3. **Backlog level**
   Who manages what level of detail?
4. **Capacity allocation**
   How do we allow time for technical and architectural investments?
5. **Touch points**
   At which ceremonies and events do we engage our stakeholders?

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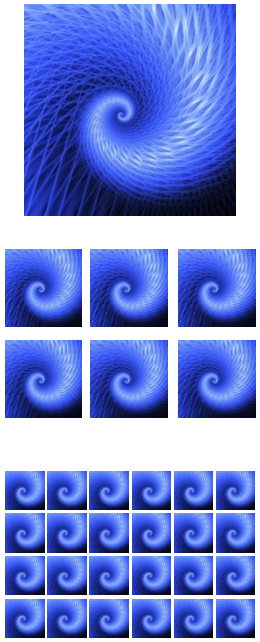
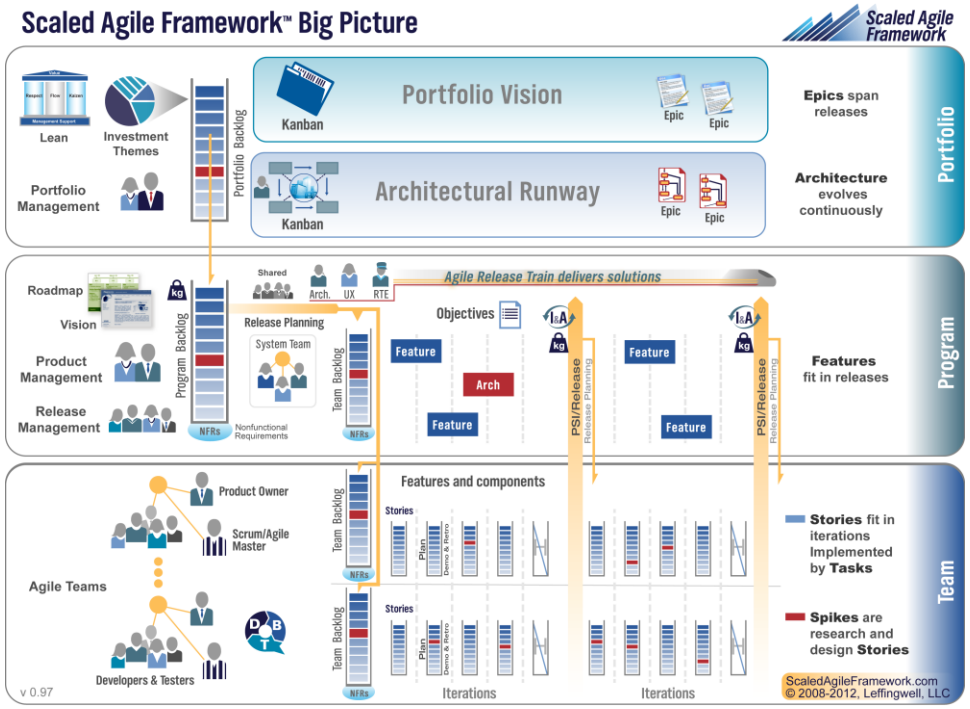
Stakeholder Managers

Those managing the stakeholders also follow a fractal pattern





Program Portfolio Management

Product Managers

Product Owners

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Stakeholder Managers

There are overlaps and inter-relationships between stakeholder managers and stakeholders

- CEO, CTO, CMO CFO
- Line of business owners
- Key customer constituents

Program Portfolio Management

- Customers
- Marketing, Sales
- System Architect
- Deployment/Ops

Product Managers

- Customers
- Their teams
- Other teams
- System Architect

Product Owners

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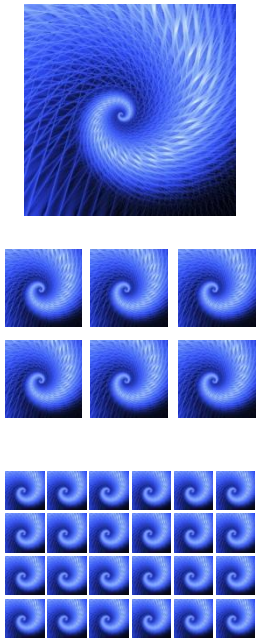
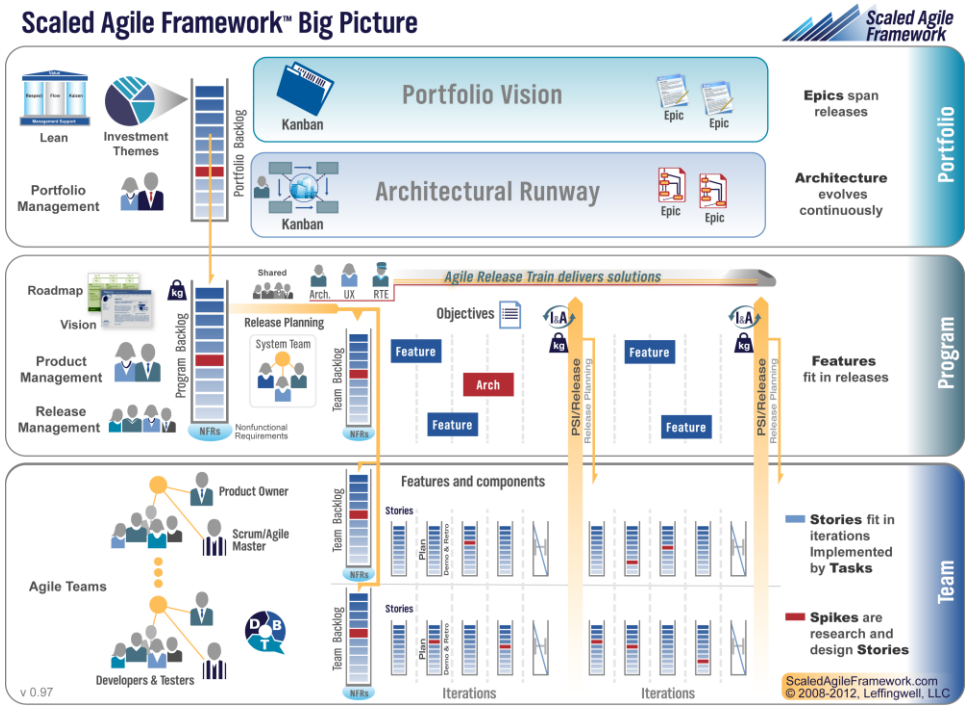
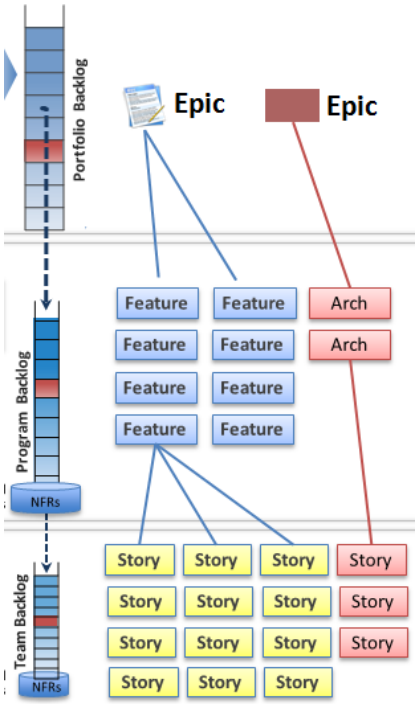
The Backlogs

There are also three levels of backlogs with priorities influenced by customers and stakeholders at each level







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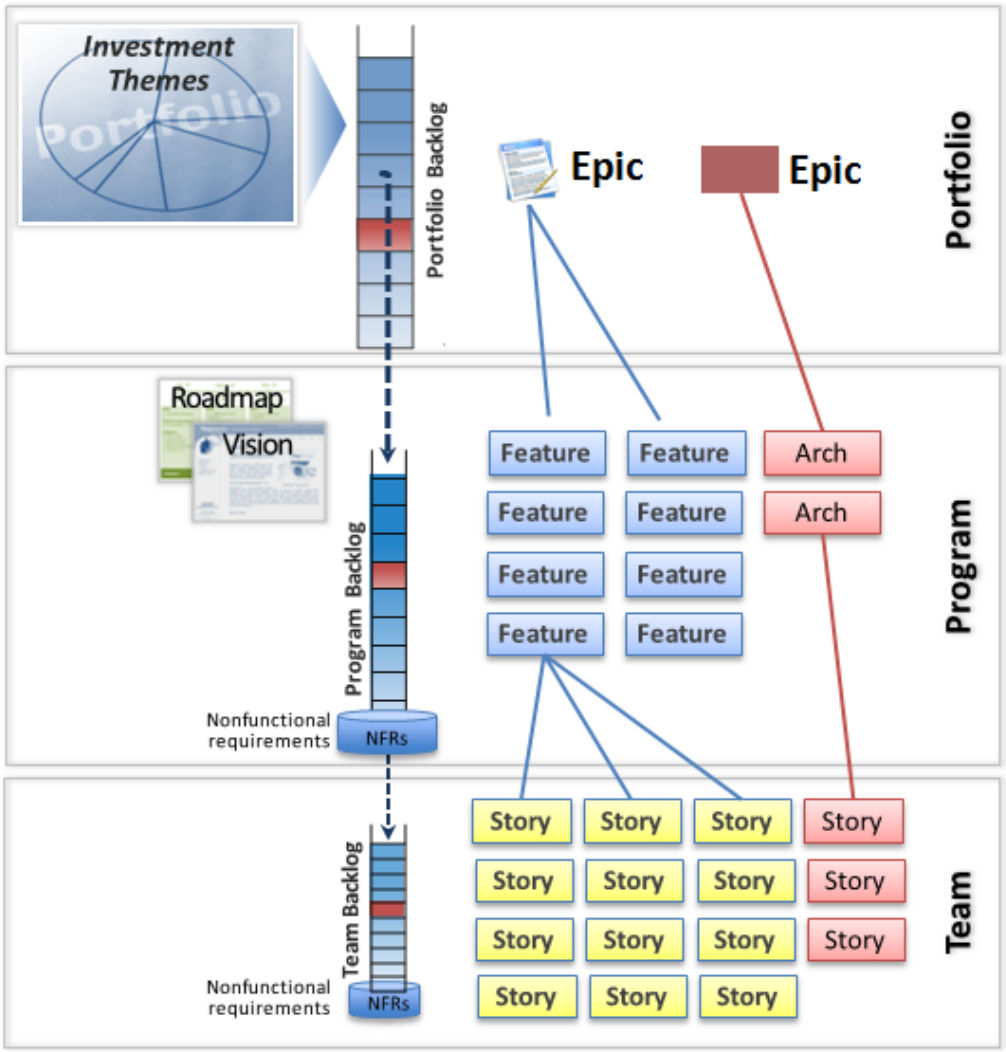
The Enterprise Backlog Model



Overview

- The Enterprise Backlog Model translates the allocation of strategic investments to the portfolio, program, and team level
- Detail is defined just-in-time and progressively elaborated

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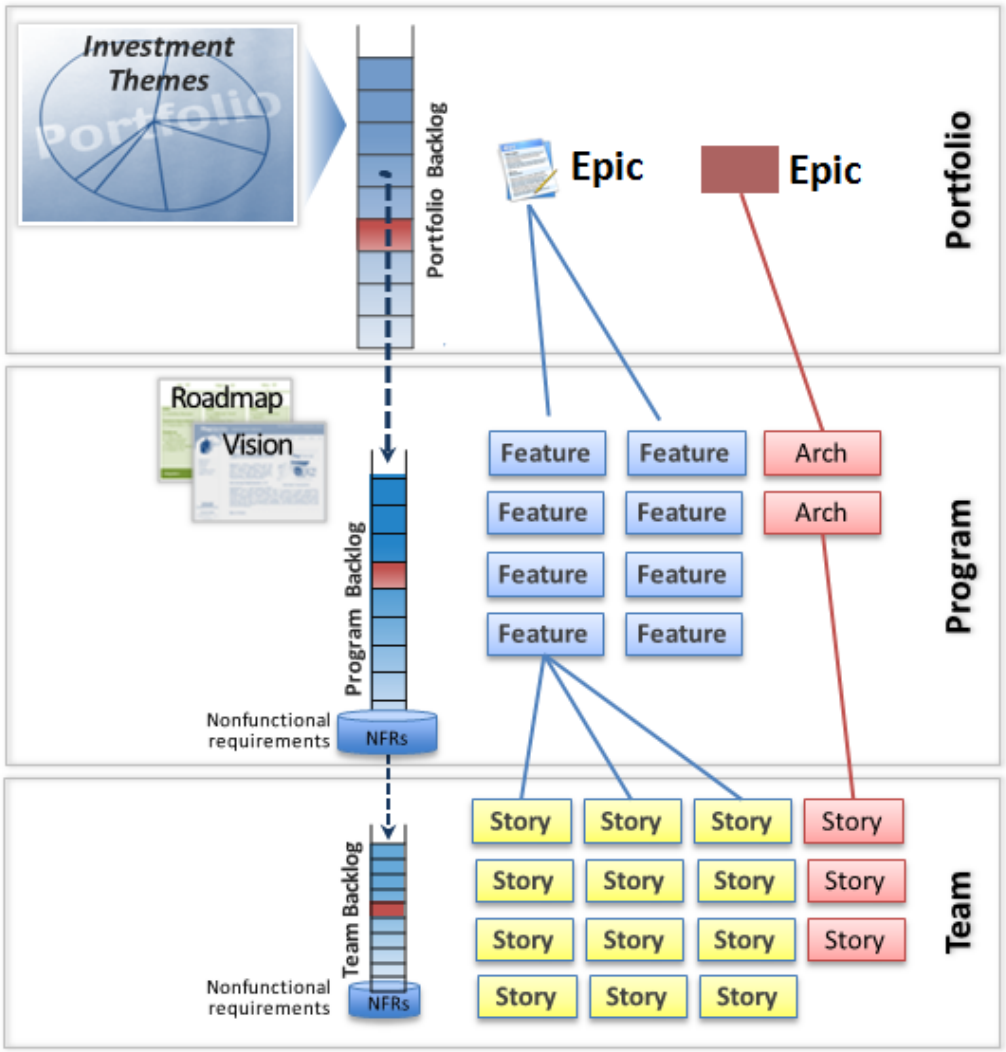
Content Authority and Decision-Making



Program Portfolio Management

Product Managers

Product Owners

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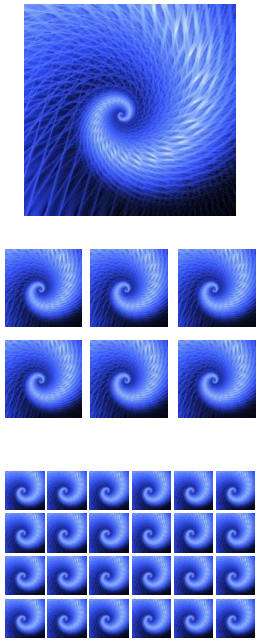
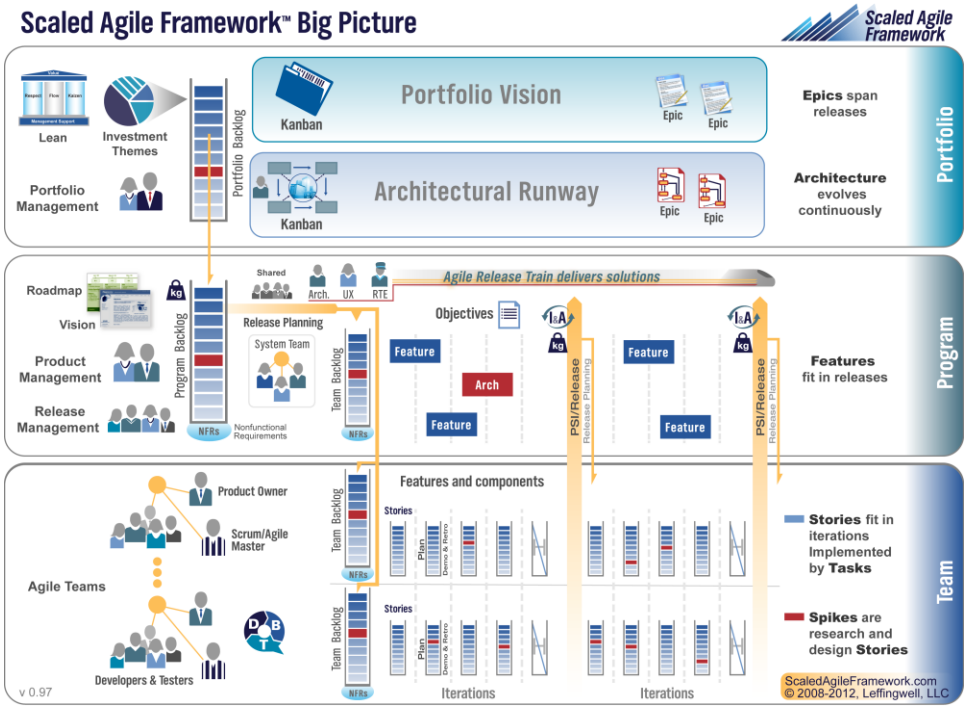
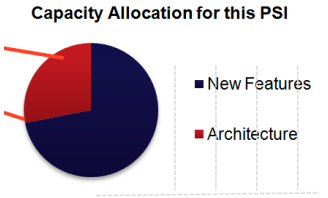
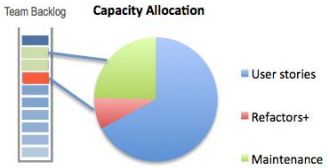
Capacity Allocation

The same approach to allocating capacity also scales









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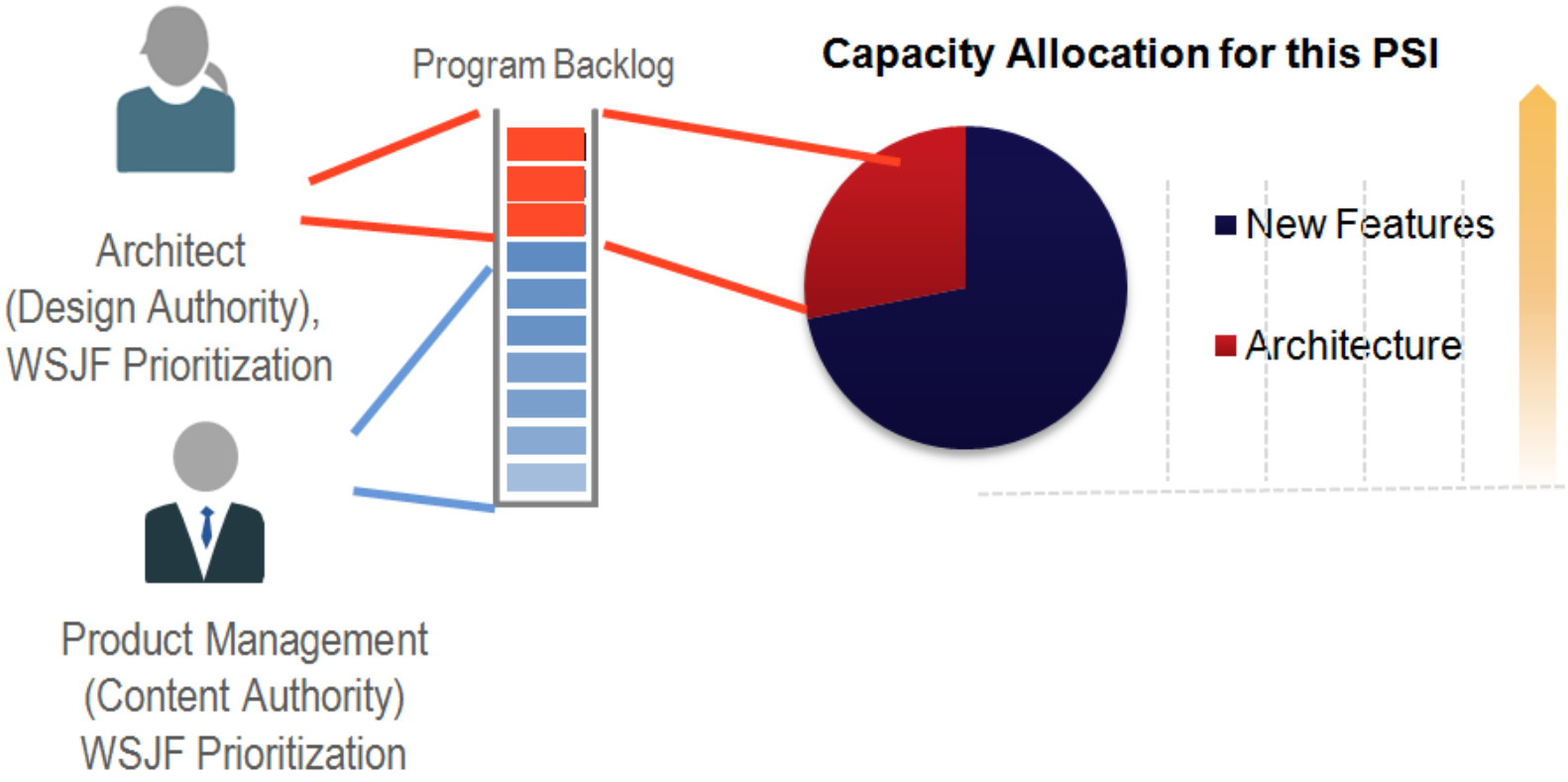
Design Authority

Capacity allocation provide a way to separate concerns, such that we can deliver the right mix of new features and architecture evolution



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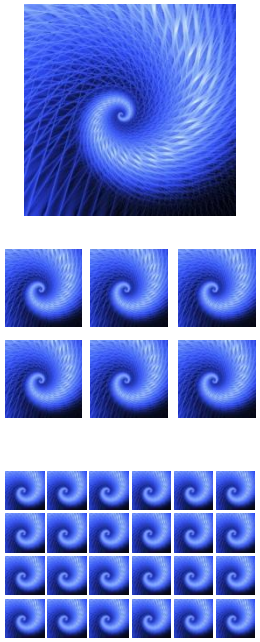
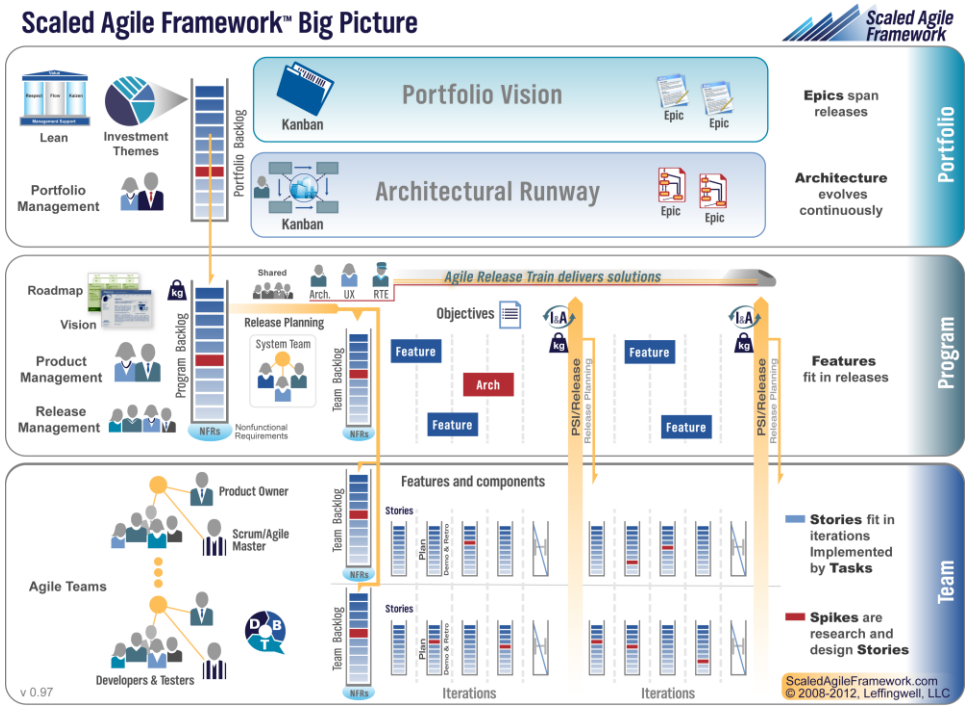
Ceremonies and Events

Likewise, there are program level ceremonies and events in which stakeholders are involved





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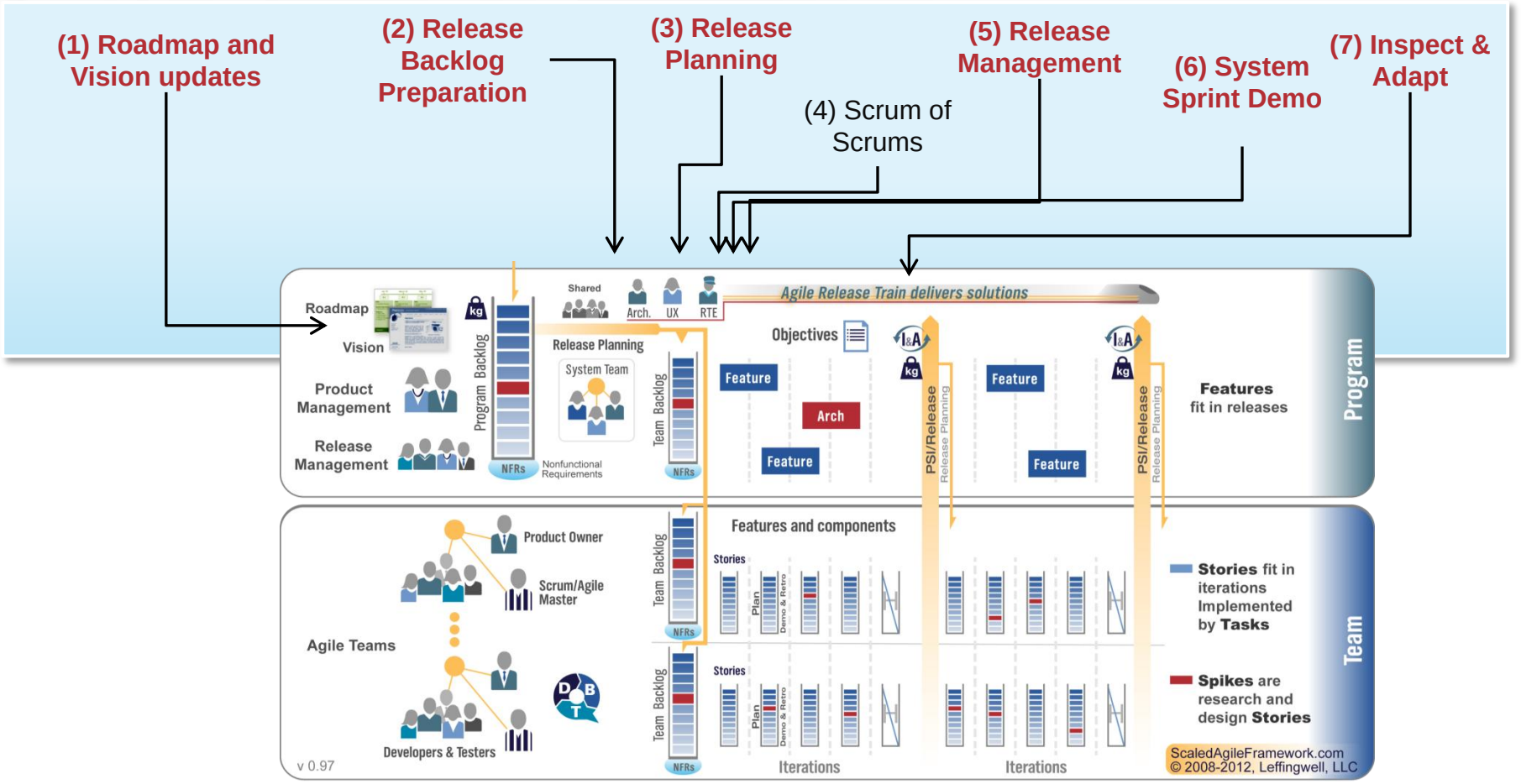
Events and Touch Points



See www.ScaledAgileFramework.com and click on the icons for details

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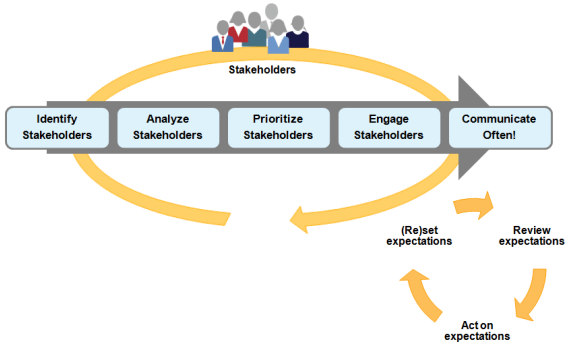
In Conclusion...

Feel free to use this presentation with your teams

and

Scaled as you scale!



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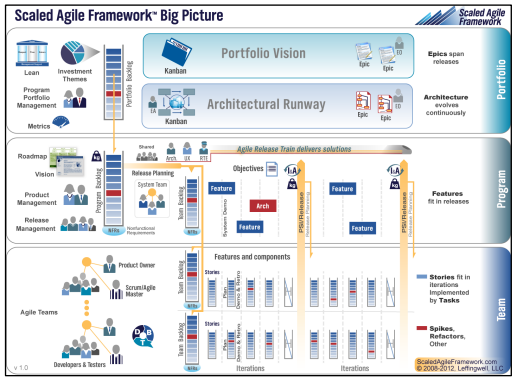

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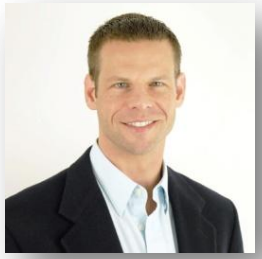
Additional Resources

ScaledAgileFramework.com

ScaledAgileAcademy.com



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Questions?

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