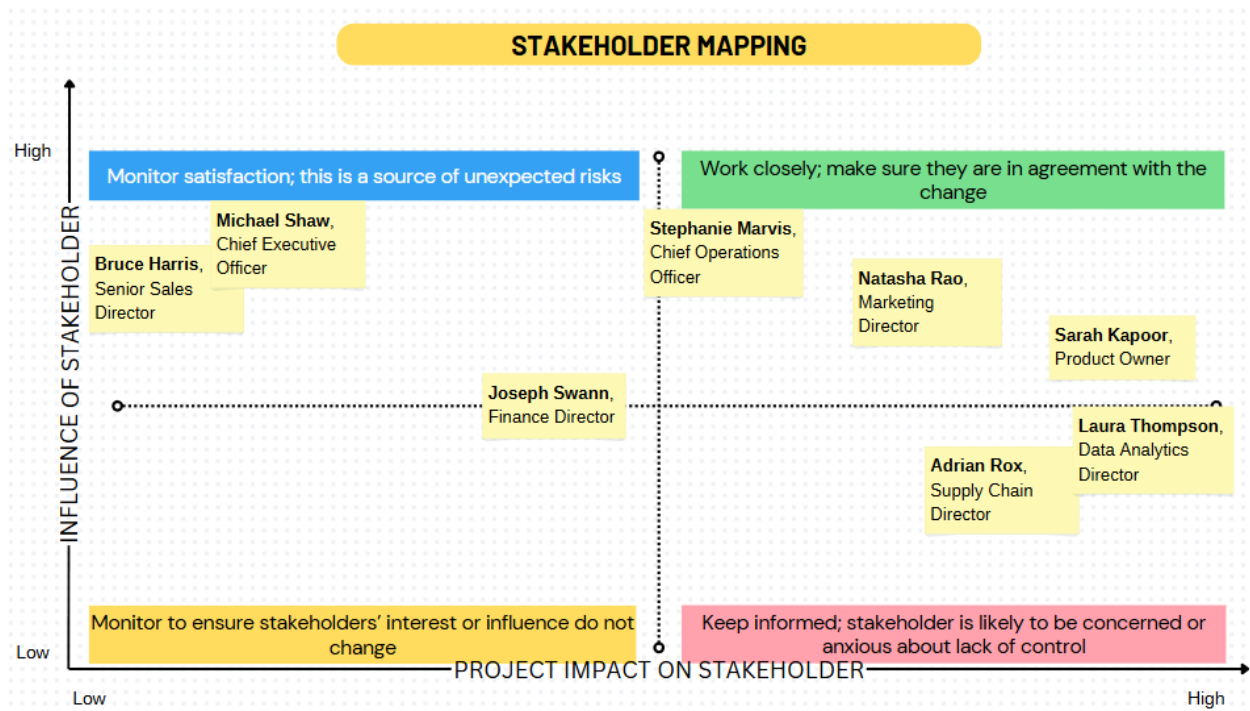# Stakeholder Roles, Responsibilities, and Engagement Strategies

In any data-driven transformation project, understanding stakeholder dynamics is crucial for success. Each stakeholder has a unique role, level of influence, and interest in the project.

We perform the stakeholder analysis in several steps:

1. First of all, you will need to identify the list of stakeholders who are all the people involved in your change or affected by your change.
2. Then understand the roles of these people in your initiative. How are they involved? What is it they are going to do or how the initiative is going to change their lives after it goes live?
3. Understand what the connections are between your stakeholders. Who of them work together? Who of them work in different departments? Who of them report to the others, or if they have any overlaps in their areas of responsibilities?
4. Make sure you understand the attitude of your stakeholders towards your initiative. Do you think they are going to be supportive of the initiative or do you foresee any issues in dealing with them?
5. Find out what decision authority your stakeholders have. You should always understand who in your stakeholder list is going to make decisions and who can only recommend solutions or suggest things.
6. And understand the influence of your stakeholders. Sometimes, even if a person doesn't have a formal authority to make decisions, their influence is so high that their decision actually matters. Or sometimes people working in different departments would listen to each other before making a decision. It is important you try to understand all of these connections and areas of influence your different stakeholders may have.

Basically, When you understand your stakeholders involvement, you can start analyzing them even further, especially trying to *understand what is the impact the solution is going to have on stakeholders and how their influence on your solution can affect the project team*. Below is an engagement strategy tailored to each stakeholder's persona, ensuring that the project aligns with business needs while securing necessary buy-in.

STAKEHOLDER MAPPING

INFLUENCE OF STAKEHOLDER

High

Monitor satisfaction; this is a source of unexpected risks

Michael Shaw, Chief Executive Officer

Bruce Harris, Senior Sales Director

Work closely; make sure they are in agreement with the change

Stephanie Marvis, Chief Operations Officer

Natasha Rao, Marketing Director

Sarah Kapoor, Product Owner

Joseph Swann, Finance Director

Laura Thompson, Data Analytics Director

Adrian Rox, Supply Chain Director

Monitor to ensure stakeholders' interest or influence do not change

Keep informed; stakeholder is likely to be concerned or anxious about lack of control

Low

PROJECT IMPACT ON STAKEHOLDER

Low — High

1. Bruce Harris- Senior Sales Director

Responsibilities

- **Leads the sales division**, ensuring revenue growth and client acquisitions.
- **Key decision-maker** in approving sales strategies and initiatives.
- **High influence** but **low impact/ interest**, making stakeholder buy-in challenging.

Engagement Strategy

- Align Insights with Business Impact: Since Bruce is not a fan of data analytics, it is essential to frame discussions around sales growth and deal closures rather than technical details. Present data-backed success stories to highlight how analytics supports revenue generation.
- Use Visual Storytelling: Instead of numbers-heavy reports, incorporate intuitive dashboards and sales trend visualizations to make insights engaging.
- Leverage Key Influencers: Natasha Rao (Marketing Director) and Stephanie Marvis (COO) can be strategic allies in influencing Bruce's perception of the project.
- Frequent but Concise Updates: Bruce's engagement should be light-touch but high-value, ensuring that he sees practical benefits without being overwhelmed by technicalities.

2. Joseph Swann – Finance Director

Responsibilities

- Oversees **financial operations**, **budgeting**, and **cost optimization**.
- A highly **detail-oriented** stakeholder with an analytical mindset.
- **Medium influence** and **medium impact/ interest**, making him a crucial ally for financial validation of project outcomes.

Engagement Strategy

- Ensure Data Accuracy: Since Joseph is highly meticulous, financial reporting accuracy must be flawless. Any discrepancies in numbers could undermine confidence in the analytics solution.
- Provide Granular Financial Insights: Unlike other stakeholders, he appreciates detailed financial forecasts, variance analysis, and profitability trends.
- Structured Communication Approach: Regular deep-dive sessions (bi-weekly/monthly) can help address his queries while ensuring alignment with financial objectives.
- Position Analytics as a Cost-Saving Enabler: Demonstrating how data-driven insights enhance cost efficiency and reduce financial risks will strengthen his interest.

3. Adrian Rox- Supply Chain Director

Responsibilities

- Oversees **supply chain efficiency**, **inventory management**, and **logistics**.
- A **highly technical stakeholder** with a deep understanding of Power BI.
- **Medium influence** but **high impact/ interest**, making him a **collaborative partner** in refining analytics capabilities.

Engagement Strategy

- Encourage Technical Discussions: Adrian's expertise in Power BI makes him a valuable stakeholder for discussing advanced analytics features and dashboard capabilities.
- Incorporate Real-Time Supply Chain Insights: Since he is deeply invested in the project, provide him with live data visualizations, inventory heat maps, and predictive analytics for supply chain efficiency.
- Address Feature Requests Iteratively: Given his technical curiosity, Adrian will likely suggest enhancements to the dashboards. These should be addressed incrementally, ensuring feasibility without derailing project timelines.
- Keep Engagement Hands-On: Providing Adrian with early access to prototypes and involving him in UAT (User Acceptance Testing) can increase project credibility.

4. Natasha Rao- Marketing Director

Responsibilities

- Heads **marketing strategy**, **brand positioning**, and **customer engagement** initiatives.
- A **data-driven leader** who understands the value of analytics.
- **High influence** and **high impact/ interest**, making her an essential **project champion**.

Engagement Strategy

- Empower Natasha as a Project Advocate: Given her strong influence and enthusiasm for data, positioning her as a key advocate can accelerate project adoption across teams.
- Showcase Customer Insights: Highlight data-driven marketing trends, customer segmentation, and campaign performance analytics to align with her strategic goals.
- Collaborate on cross-functional initiatives: Since marketing insights often intersect with sales and supply chain, integrating customer demand forecasting and market trend analysis will add value to her domain.
- Leverage her Influence to Drive Adoption: Encouraging Natasha to share success stories with executives can help secure broader stakeholder buy-in.

5. Michael Shaw- Chief Executive Officer (CEO)

Responsibilities

- Defines AtliQ Hardware's long-term vision and strategic direction.
- Drives company-wide digital transformation and expansion efforts.
- **High influence** but **low operational involvement**, meaning his focus is on high-level business impact rather than granular execution details.

Engagement Strategy

- Tie Analytics to Business Growth: Since Michael is focused on AtliQ's global strategy, the emphasis should be on how data analytics drives market expansion, competitive positioning, and revenue growth.
- Present Executive-Friendly Insights: Use high-level dashboards and KPI summaries rather than technical reports. Quarterly strategy meetings with a focus on ROI, cost savings, and market trends will be more effective than frequent operational updates.
- Showcase Competitive Intelligence: Given his concern about Dell's competitive edge, benchmarking AtliQ's performance against industry leaders and demonstrating data-driven advantages will capture his interest.
- Leverage Internal Champions: Since Michael won't be involved in the daily execution, relying on key advocates like Stephanie Marvis (COO) and Natasha Rao (Marketing Director) to reinforce the project's strategic value can ensure long-term buy-in.

6. Stephanie Marvis- Chief Operations Officer (COO)

Responsibilities

- Oversees **operational efficiency** and **cross-functional alignment**.
- A **calm** and **pragmatic decision-maker**, newly appointed to her role.
- **High influence** but **medium impact/ interest**, making it crucial to showcase long-term strategic value.

Engagement Strategy

- Highlight Operational Efficiency Gains: Since Stephanie oversees resource allocation, the project's impact on workflow automation and process optimization should be emphasized.
- Provide High-Level Impact Summaries: Unlike functional directors, she requires big-picture insights rather than granular details. Quarterly impact reports focusing on efficiency improvements will be most effective.
- Demonstrate Long-Term Scalability: Securing future analytics investments hinges on Stephanie 's support. Positioning the project as a foundation for enterprise-wide analytics expansion can strengthen her buy-in.
- Establish an Executive-Level Rapport: Building a trust-based relationship with Stephanie can pave the way for securing additional resources and leadership backing.

7. Sarah Kapoor- Product Owner

Responsibilities

- Represents the **data analytics team's interests** and acts as a bridge between technical and business stakeholders.
- **Medium influence** but **high impact/ interest**, making him a key player in ensuring the project aligns with user needs.

Engagement Strategy

- Foster Continuous Collaboration: Since Sarah is deeply involved in day-to-day execution, maintaining constant communication through stand-ups and working sessions is essential.
- Ensure Backlog Prioritization: Given his role in product ownership, aligning feature development with business priorities ensures seamless project progression.
- Leverage his Advocacy for Stakeholder Alignment: Sarah can help manage expectations across teams, ensuring technical feasibility while meeting business demands.
- Engage in Iterative Solution Refinement: Incorporating Sarah's feedback loops during UAT and sprint planning will drive solution improvements.

8. Laura Thompson – Data Analytics Director

Responsibilities

- Leads the newly formed data analytics team.
- Drives the strategic adoption of analytics across business functions.
- **Medium-to-high influence** and **high impact/ interest**. As the leader of the data analytics team, she has direct control over execution, but strategic direction comes from the executive leadership.

Engagement Strategy

- Align Analytics Initiatives with Leadership Goals: Given Laura's strategic role, ensuring that analytics initiatives support leadership priorities will maximize business impact.
- Showcase Competitive Benchmarking: Highlighting AtliQ's market position against competitors like Dell will drive data-driven competitive strategies.
- Embed a Data-Driven Decision-Making Culture: Facilitating cross-departmental adoption of analytics ensures that insights fuel operational and strategic decisions.
- Drive Continuous Analytics Improvement: Encouraging innovation in data analytics practices will help AtliQ stay ahead in leveraging business intelligence.

Strategic Takeaways

- Stakeholder engagement requires a tailored approach based on influence, interest, and priorities.
- Balancing technical depth with business value ensures that data-driven insights resonate across leadership.
- Leveraging high-influence advocates (Natasha Rao & Stephanie Marvis) can accelerate project adoption and secure leadership buy-in.
- Maintaining iterative feedback loops (Adrian Rox & Sarah Kapoor) ensures continuous improvement and alignment with evolving business needs.
- Ensuring executive alignment (Stephanie Marvis and Michael Shaw) strengthens long-term support.

This structured approach ensures effective stakeholder management, fostering successful project execution and enterprise-wide adoption of analytics.