

# Lab: Develop a Stakeholder Engagement Plan

*Estimated duration: 20 minutes*

## Objectives

Develop a stakeholder engagement plan for the given scenario including:

- Identify every stakeholder role in the given scenario
- Review the commitment designators (Current and Desired)
- Develop a stakeholder engagement plan with strategies for engagement

## Prerequisites

You must have Microsoft Office or Microsoft 365 apps installed on your computer or have access to the free web version of Microsoft 365.

## Scenario: Marketing automation process

A project is underway to automate the marketing process at a company. There are six key stakeholders for the project.

- **Hunter** is the project sponsor and is responsible for creating a training program for the sales team. Hunter is a highly active sponsor. He consistently makes every effort to guarantee that all deliverables are provided on time while continuing to support the project.
- **Jose** is the Marketing Department Head. He is aware of a plan to automate some key marketing processes in the project. Although he is not against these plans, he doubts the timing for this project. Jose currently manages a number of subject matter experts from marketing, who will be needed to support this project.
- **Preeti** is an audio/video subject matter expert. She knows very little about the project at this point. She will be needed to set up all AV for an upcoming executive level presentation scheduled next month to share the newly proposed process. She must take an active role to ensure success.
- **Sunny** is a Financial Manager working as a subject matter expert for the project. Sunny views the project favorably and convinces her team of the value of the project. Project deliverables recently changed, and Sunny will be needed to perform some critical tasks.
- **Mariko** serves as an Operations Manager. She manages a group that performs a number of key support processes. This process is one that falls within Mariko's area of responsibility. She thinks this project is "change for change sake." Without Mariko's cooperation, the project will fail.
- **Krishna** is the lead quality control director in the organization. Krishna's team will

be essential to releasing the financial process and any marketing tool upgrades required. Krishna's team will be responsible for inspecting and verifying all project deliverables. At this point, Krishna has not been brief on the project.

## Exercise: Develop a Stakeholder Engagement Plan

**Step 1:** Keeping the CTRL key pressed, click [here](#) to view or download the **Stakeholder Engagement Plan Worksheet**. **Note:** On Mac systems, keep the COMMAND button pressed instead of the CTRL button.

**Step 2:** In the first column, list the name of the stakeholder.

**Step 3:** Determine the current state of commitment level of the stakeholder using the U,N,R,S, or L indicator. Then, add the level in the second column.

**Step 4:** Determine the desired state of commitment level of the stakeholder using the U,N,R,S, or L indicator. Then, add the desired level in the third column.

**Step 5:** Use the last column to define the strategy for shifting the state of the stakeholder from the current to desired state. Here is some guidance on adding the strategy:

- Define a strategy to move the current commitment to the desired commitment level if different.
- Define a strategy to maintain the current and desired commitment level if the same.

## Potential Solution

After completing the exercise, you can refer to the **Stakeholder Engagement Plan Potential Solution** document to compare the potential solution listed in the document with your solution.

Keeping the CTRL key pressed, click [here](#) to view or download the **Stakeholder Engagement Plan Potential Solution** document.

**Note 1:** On Mac systems, keep the COMMAND button pressed instead of the CTRL button.

**Note 2:** The document will open in a new tab.