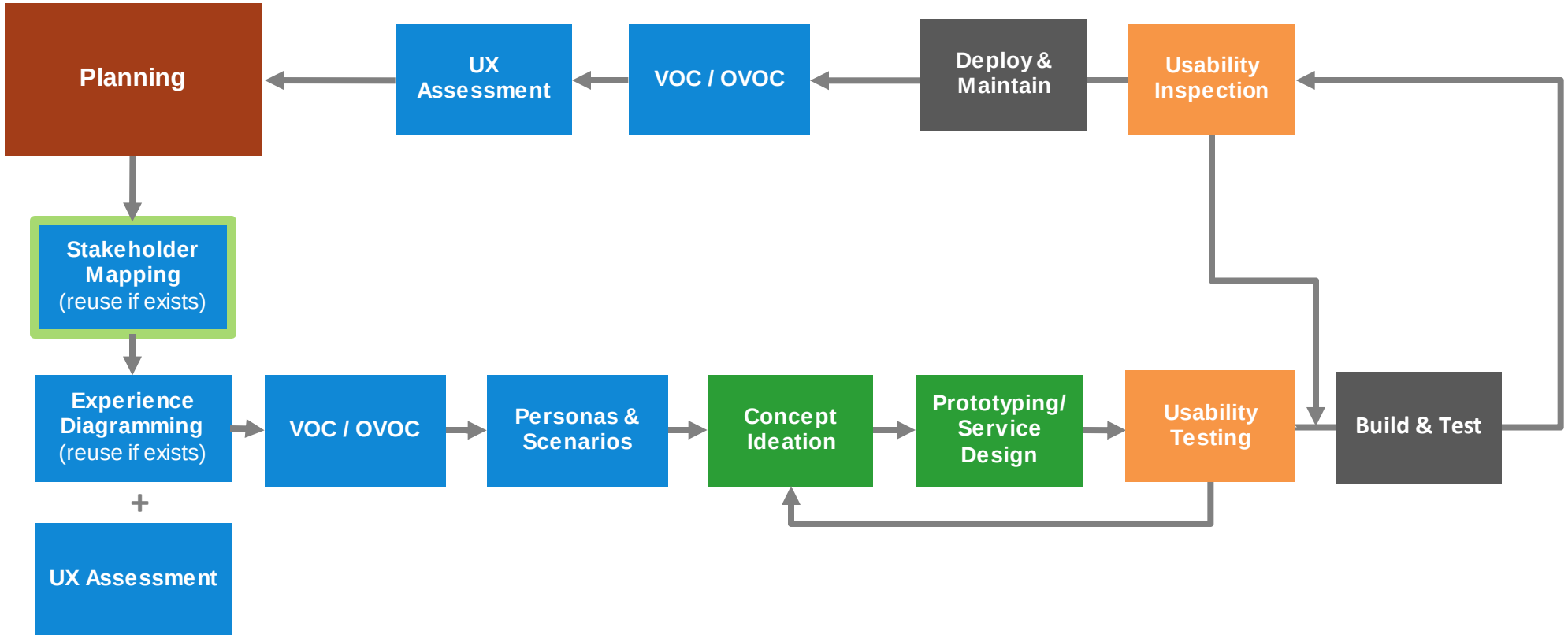
The IT HUE Process



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What is Stakeholder Mapping?

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Stakeholder Mapping

What

Identifying the individuals or groups that are likely to affect or be affected by an experience and sorting them according to their impact and the impact the experience has on them.

Why

- Identify key stakeholders throughout the customer and user experience journey
- Understand the relationships of stakeholders and impact of the experience
- Develop shared understanding of different stakeholders and their pain points
- Develop priorities for opportunities to address or problems to solve

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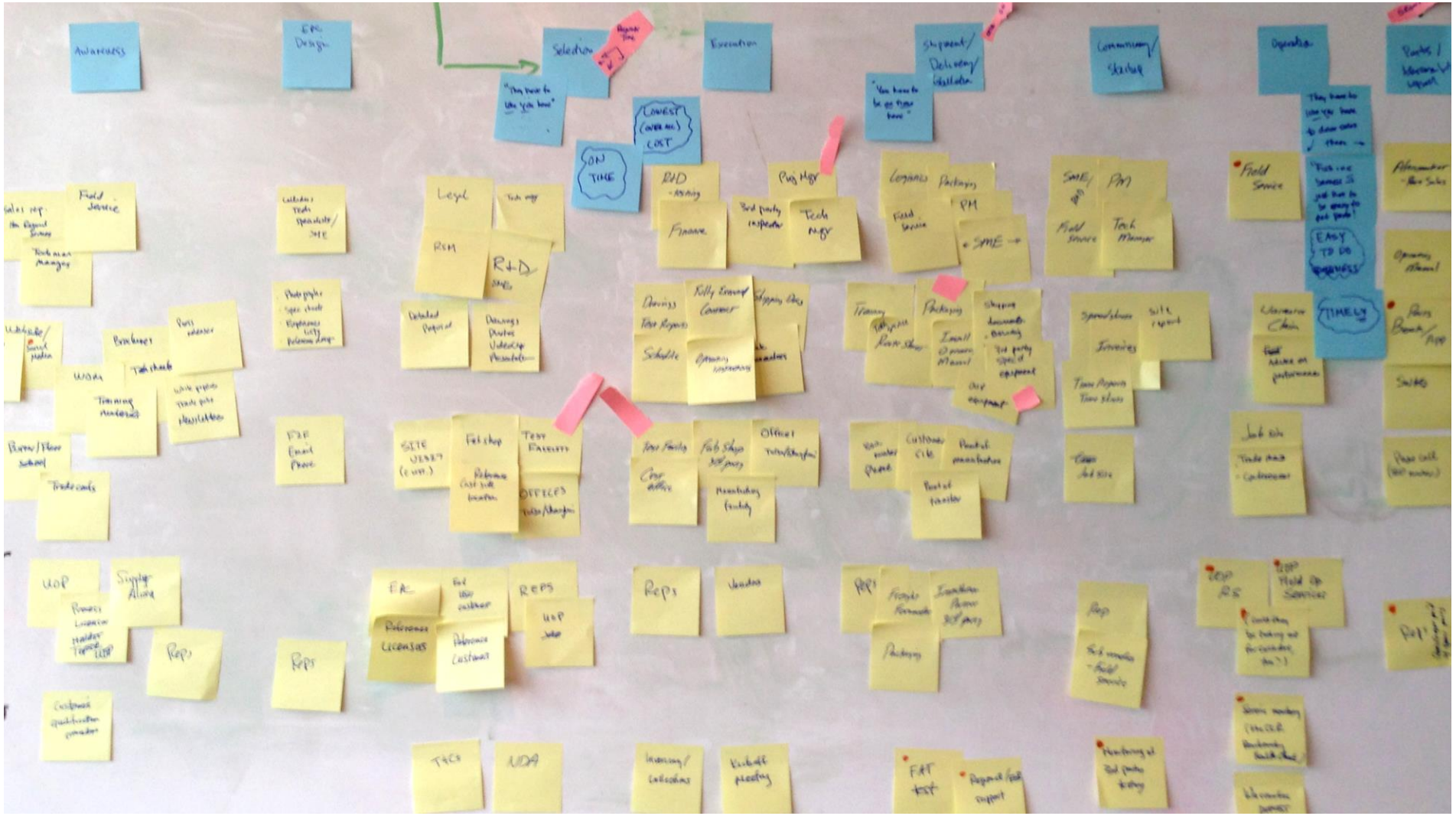
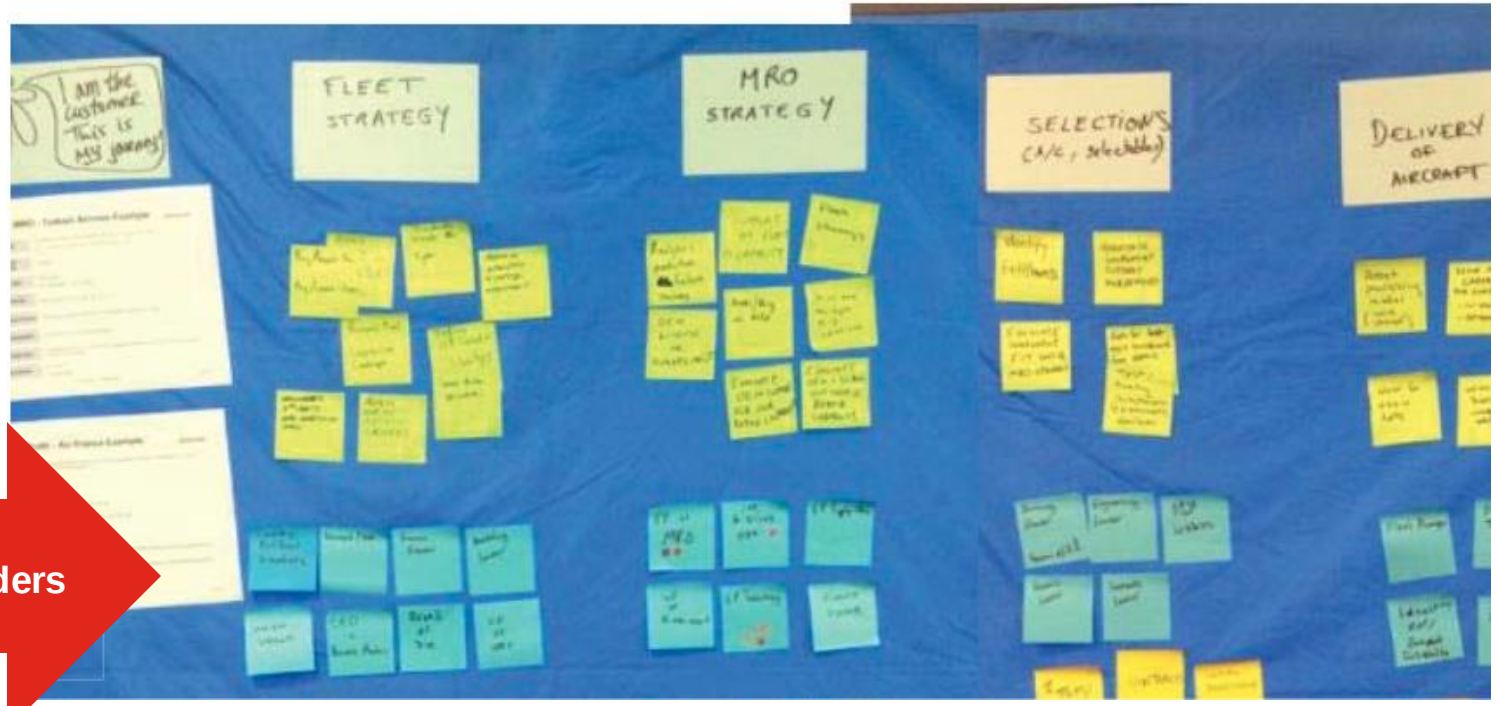

Awareness
Selection
Execution
Field Service
Legal
R&D
Finance
Tech Mgr
PM
SME
Tech Manager
Field Service
EASY TO DO BUSINESS
TIMELY
Training
Invoices
Site report
Packaging
Email
Spare parts
Schedule
Reps
Reps
Reps

Stakeholder Mapping | Examples

- A stakeholder map is created by a team of people using cards and sticky notes on a wall to make sure it is visible and easy to manipulate.

- If necessary or desired, a more in-depth Stakeholder Analysis can be conducted that explores the ecosystem of stakeholders who influence and are influenced by a particular stakeholder from the Journey Map.



Stakeholders

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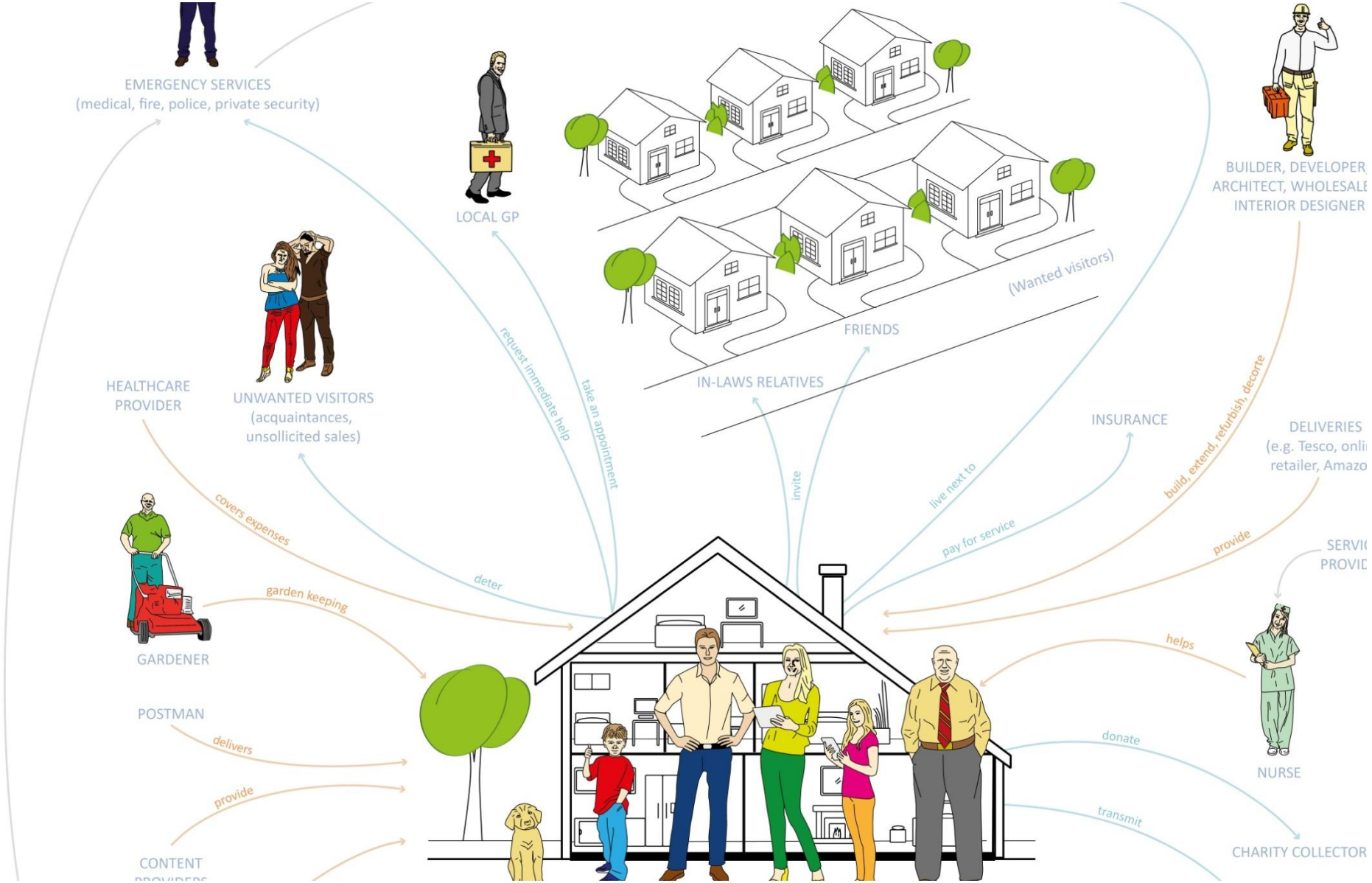
Stakeholder Mapping | Examples (ACS)



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Stakeholder Mapping | Examples

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Stakeholder Mapping | Tips

- Stakeholders can include a lot of different people.
  - Remember that stakeholders can be customers and/or actual end users of a product or service.
  - Stakeholders represent anyone from the customer side who experience the activities of each phase of a customer journey.
  - This typically includes individuals or teams (i.e. a department of function) that undertake the ACTIVITIES that occur during the phase.

- Stakeholders may also include someone who is impacted, influenced or influencing activities during the phase. This includes product owners or executives who receive the output like reports or through dashboards.

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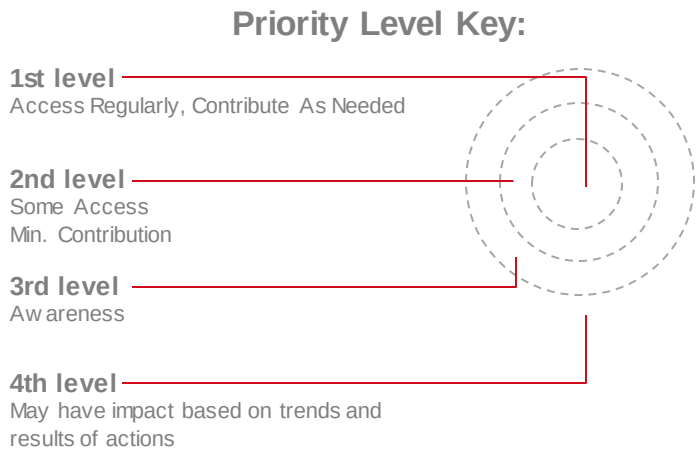
Stakeholder Mapping | Output

There are several ways to document stakeholder maps. Onionskin or **bullseye maps** are the recommended ways.

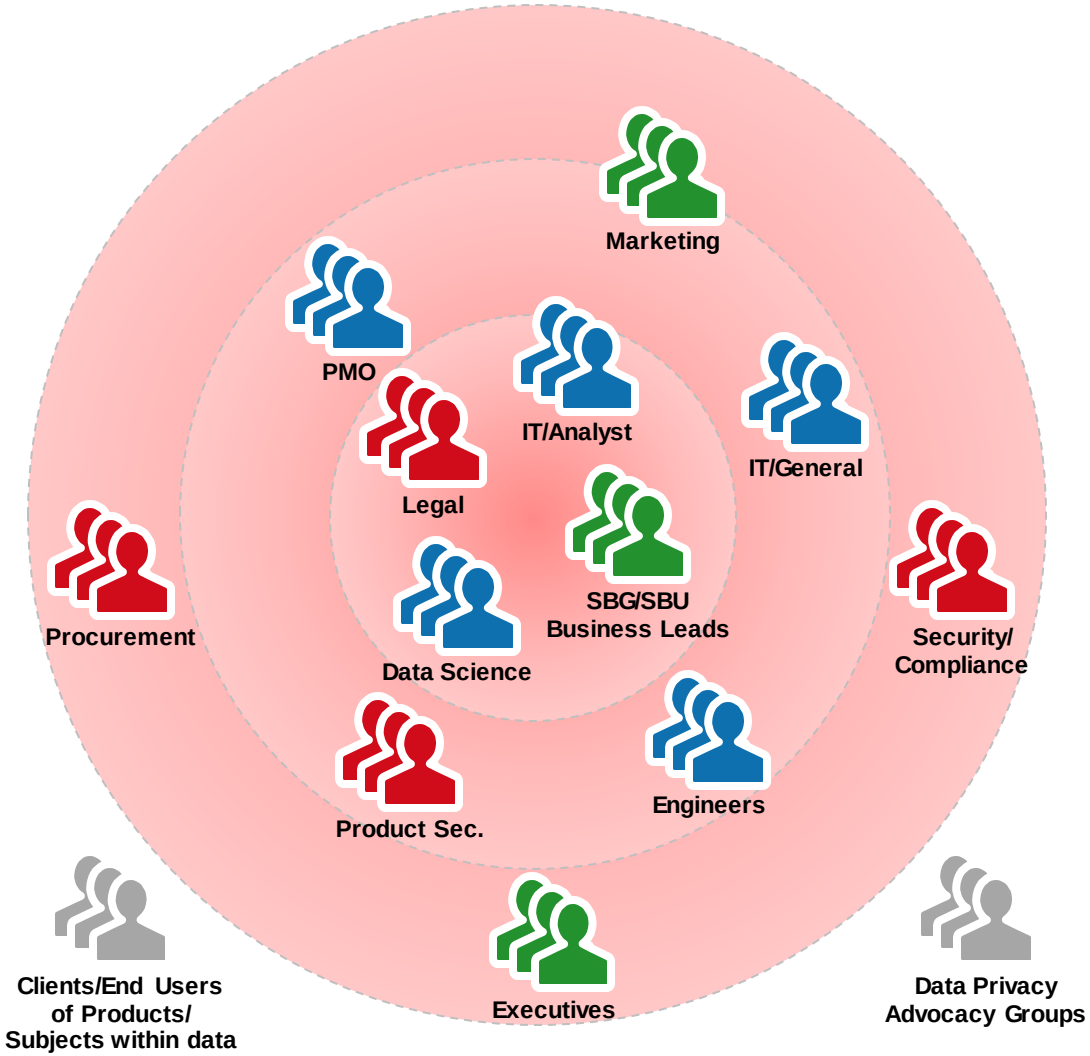
- Each stakeholder is placed in a ring depending on how active or important the stakeholder is.
- The color of the stakeholder silhouettes can imply additional dimensions like internal vs external stakeholder or our level of knowledge about them.

Prioritized Stakeholders and Stakeholder Groups

The bull's-eye diagram on the right shows the primary stakeholders and stakeholder groups prioritized by user and site goals.



Bull's-eye Diagram example



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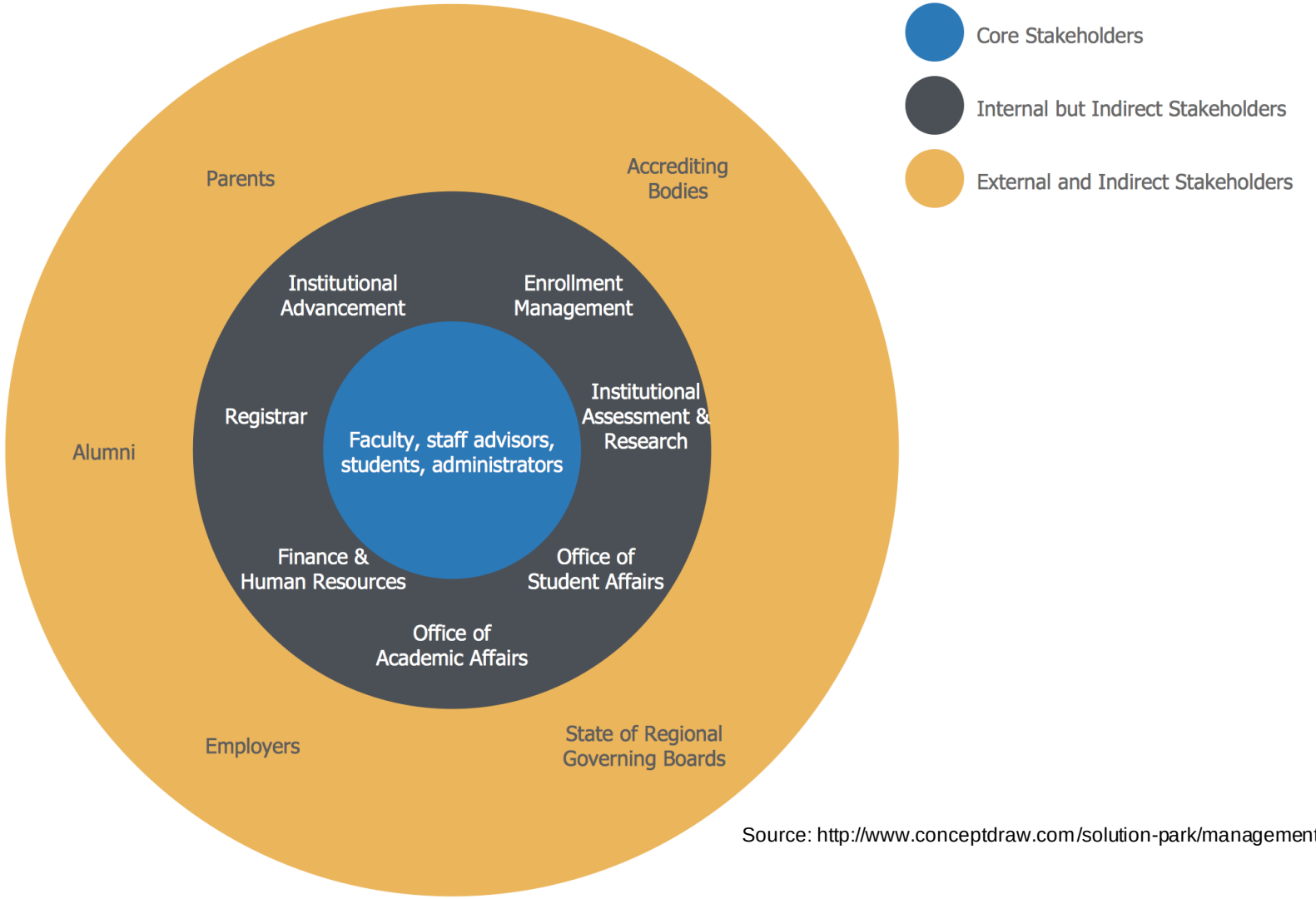
Stakeholder Mapping | Output

Additional example



Source: http://www.conceptdraw.com/solution-park/management-stakeholder-onion-diagrams

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Quiz

Stakeholder Analysis is an input into which HUE step?

A. Persona Creation
B. Iterative Design
C. Experience Diagramming
D. Heuristic Reviews
★ E. A and C

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Stakeholder Mapping Steps

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Stakeholder Mapping Steps

Plan	1	Identify Participants	Identify participants for the stakeholder mapping, e.g. project manager, SMEs, users
	2	Invite Participants	Invite participants to stakeholder mapping meeting
	3	List Influenced People	In meeting, list all types of people that have a stake in the targeted offering
Analyze & Design	4	Sketch Roles	Sketch each different role as a silhouette
	5	Label All Stakeholders	For each stakeholder add a label providing role or title
	6	Add Characteristics	For each stakeholder, add key characteristics
	7	Prioritize	Prioritize stakeholders, e.g. by using a bulls-eye diagram
	8	Organize Relationships	Organize stakeholders so they represent relationships and groupings
	9	Add Visual Cues	Add circles and stars to signify an additional dimension of prioritization about stakeholders
Share	10	Move to PowerPoint	Transfer the stakeholder map into an electronic version using PowerPoint, or other tool
	11	Store & Share	Store electronic stakeholder map as project artefact on project share drive

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Step 1: Planning – Identify Participants

Identify participants for the stakeholder mapping

- Start with the end of a value chain
  - Write “End User” on a post-it and place on the wall
- Identify all stakeholders for this group
  - Write each stakeholder name on a post-it and place it below “End User”
  - Should be a role or official group you can interact with, not generic
    - “Business Manager at potential partner company” is better than “Partner Company”
  - Include people that are affected positively or negatively
- For priority stakeholders, capture key concerns, who they influence, and what you still need to know

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Step 1: Planning – Identify Participants

- Repeat for each level of stakeholder
  - Walk back through the value chain one step at a time
    - e.g. Employee → IT Portal → Support person → 3rd level support → Order System → Honeywell Procurement → Laptop supplier
    - e.g. End Customer → Dealer → OEM → Seat Manufacturer → Foam Manufacturer → Supply House → Honeywell internal
  - If you have additional value chains for different applications, create a separate Stakeholder Map for each
  - Continue identifying stakeholders until you reach beginning of value chain
- Clean it up
  - Is anyone missing? Are there any duplicates?
  - Include the project manager, SMEs, and admin users.
  - Make sure you include stakeholders that are not directly in the value chain, like regulatory bodies

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Step 2: Planning – Invite Participants

Invite participants to stakeholder mapping meeting.

- This meeting should be ideally face-to-face. If not possible, the next best solution would be a Lync call with video sharing

- Invite people
  - From across functions (Marketing, Engineering, Sales, Project Management, etc.)
  - Only invite people with “skin in the game”
  - Between 4-10 people works best

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Step 2: Planning – Logistics

- Book a room
  - Big enough for everyone to move around
  - With enough wall space to hang a few pages of flipchart paper
- Bring materials
  - Square Post-its
  - Markers
  - Flip chart paper
  - Any prior documentation (value chains, business requirements, creative briefs, etc.)

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Step 3: Meeting Activities – Listing Stakeholders

- In meeting, list all types of people that have a stake in the offering targeted in this project. This information may include the stakeholder's:
  - Interests
  - Involvement
  - Expectations
  - Importance
  - Influence
  - Impact on the project's execution, and
  - any specific communications requirements.

Possible stakeholders:

- Competitors
- Employees
- Government
- Government regulatory agencies
- Industry trade groups
- Investors
- Labor unions Local communities
- National communities
- Professional associations
- Prospective customers
- Prospective employees
- Public at large (Global community)
- Shareholders
- Suppliers

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Step 4: Sketching

Sketch each different role as a silhouette. The HUE expert can do the drawing if other people are participating over the phone.

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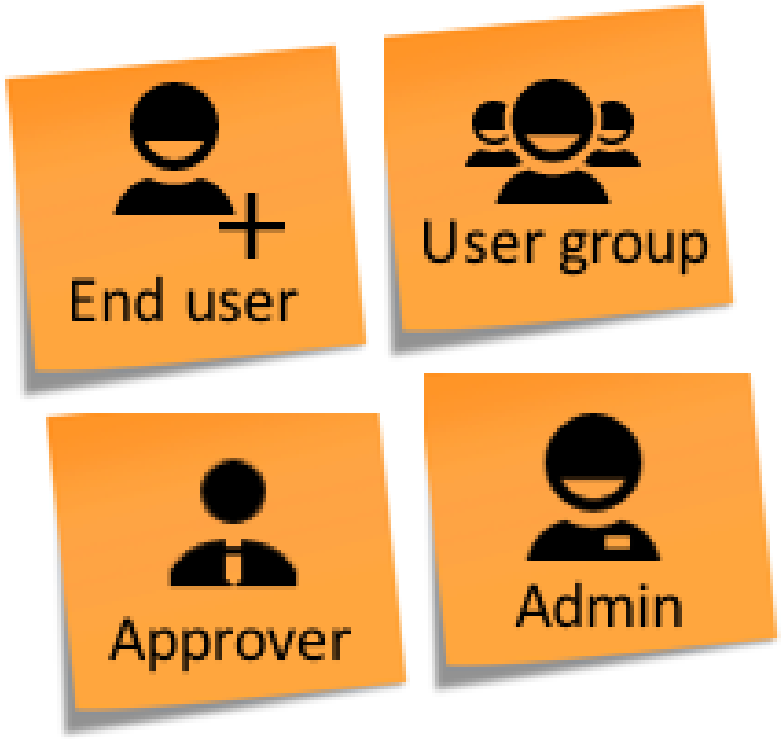
Step 5: Label all Stakeholders

For each stakeholder add a label providing role or title



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Step 6: Add Characteristics

For each stakeholder, add key characteristics:

- Existing knowledge (High or Low)
- Critical to Success (High or Low)
- Key concerns
- Who s/he influences

Name	Project Manager	Proposal Manager	End users
Our knowledge about them	L	M	L
Critical to success	H	H	H
Key concerns	Get project done on time, on budget	Get the cheapest price as long as specification is met	Ease of use; Learnability
Who they influence	Proposal Managers	Suppliers	Customer Management

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Step 7: Prioritize Stakeholders

- Identify stakeholders that are critical to success
- Identify stakeholders the team doesn't know much about
- Review as a team and decide if other stakeholders should be marked as critical to the interaction or process, these are the priority stakeholders.
  - Voting shows who the team thinks is most important, but you still need to identify all priority stakeholders

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Step 7: Prioritize Stakeholders – Bull's Eye Diagram

- Draw 2-3 concentric circles.
- Label the circles primary, secondary and tertiary with primary representing the inner most circle.
- Place the sticky notes with stakeholder information on the circle in order of relative importance
- Keep limited number of stakeholders at the center.

Note: Tertiary does not mean irrelevant. Ideally the users and the most important stakeholder will appear at the center

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Step 7: Prioritize Stakeholders – Bull's Eye Diagram

- In the Stakeholder Bull's Eye diagram, place the priority stakeholders in the middle
  - Create a thought bubble of the key concerns of the stakeholder
    - What is their mindset, relative to the offering?
    - Include both positive and negative
  - Who they influence
    - Draw an arrow to who they influence if you want
  - What you need to learn about them
    - List your questions on the flip chart
    - Be careful not to make assumptions—they can be dangerous
- Use this information to plan your OVOC and VOC to interview the high priority stakeholders.

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Step 8: Organize Relationships

- Organize stakeholders to represent relationships and groupings, e.g. by augmenting the bulls-eye diagram
- Add arrows with labels between stakeholders to show relationships
- Put a border around related groupings and label them

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Step 9: Add Visual Cues

Add additional information:

- Use stars to signify an additional dimension of prioritization about stakeholders
  - The circles can represent the influence of stakeholder on the projects
  - While stars could represent stakeholders to follow up with

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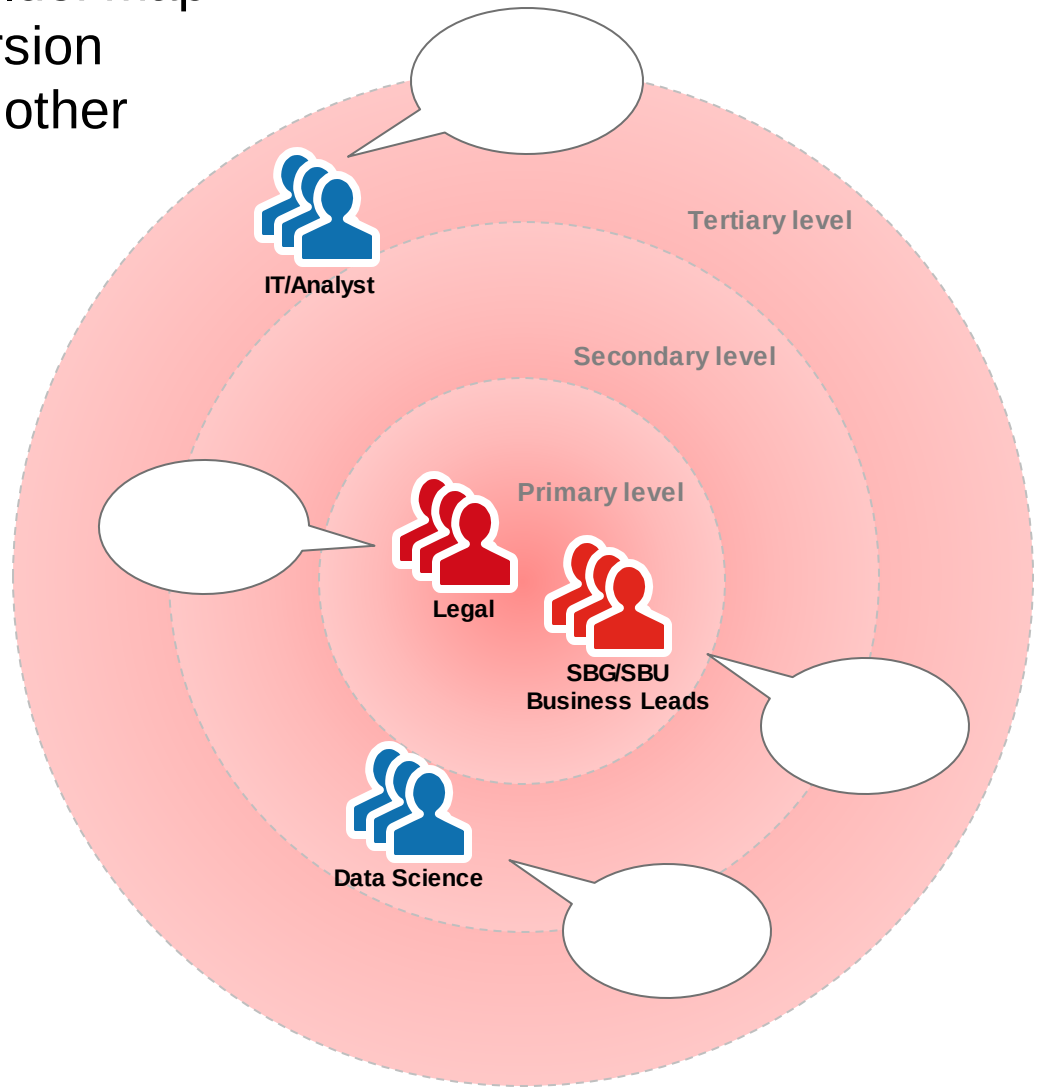
Step 10: Move to PowerPoint

Transfer the stakeholder map into an electronic version using PowerPoint or other design tools.



Templates:

Stakeholder Map Template.pptx

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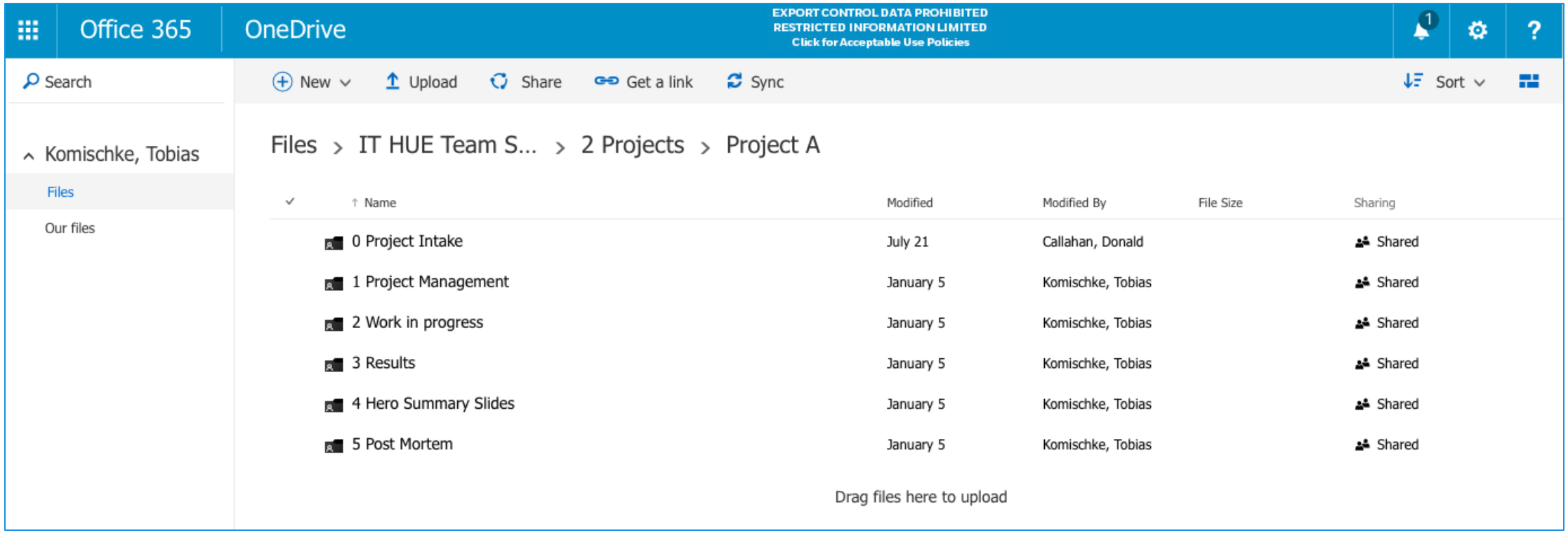
Step 11: Store and Share

Store electronic stakeholder map as project artefact on project share drive



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Tips & Tricks

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Stakeholder Mapping Tips

- **Do** involve people from across functions and **don't** do it by yourself
- **Do** use the Stakeholder Map as a means to guide you OVOC and VOC, **not** as an end in itself
- **Don't** spend time arguing about the value chain, your focus is to identify stakeholders
- **Don't** give stakeholders a generic name, use the name of a role you can interview
  - "Business Manager at potential partner company" is better than "Partner Company"
- **Don't** waste time working out details for all stakeholders, focus only on high priority
- **Don't** waste time talking about solutions, that comes later

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Activity: Stakeholder Mapping (15 mins)

Scenario:

You are tasked with designing a new IT tool to monitor babies in the Honeywell Daycare Center. The first HUE step is Stakeholder Mapping.

Task:

- Work in teams of two or three
- Think of the value chain for this service, write it down on the flip chart
- For each phase in value chain, write down each person or department that is involved.
- Write a one sentence description of what the user needs are.
- Remove duplicates and merge similar stakeholders.
- Place them on a bull's eye chart.

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Next Steps

- Share with internal stakeholders and team members

- Go deeper:
  - Create Customer Experience Diagrams (next Core Method) for key customer stakeholders
  - Create Personas for key stakeholders
    - Based on OVOC and VOC

- Create OVOC and VOC action plans based on Stakeholder Map
  - Go out and learn what you don't know about priority stakeholders

- Continuously update the Stakeholder Map based on OVOC and VOC

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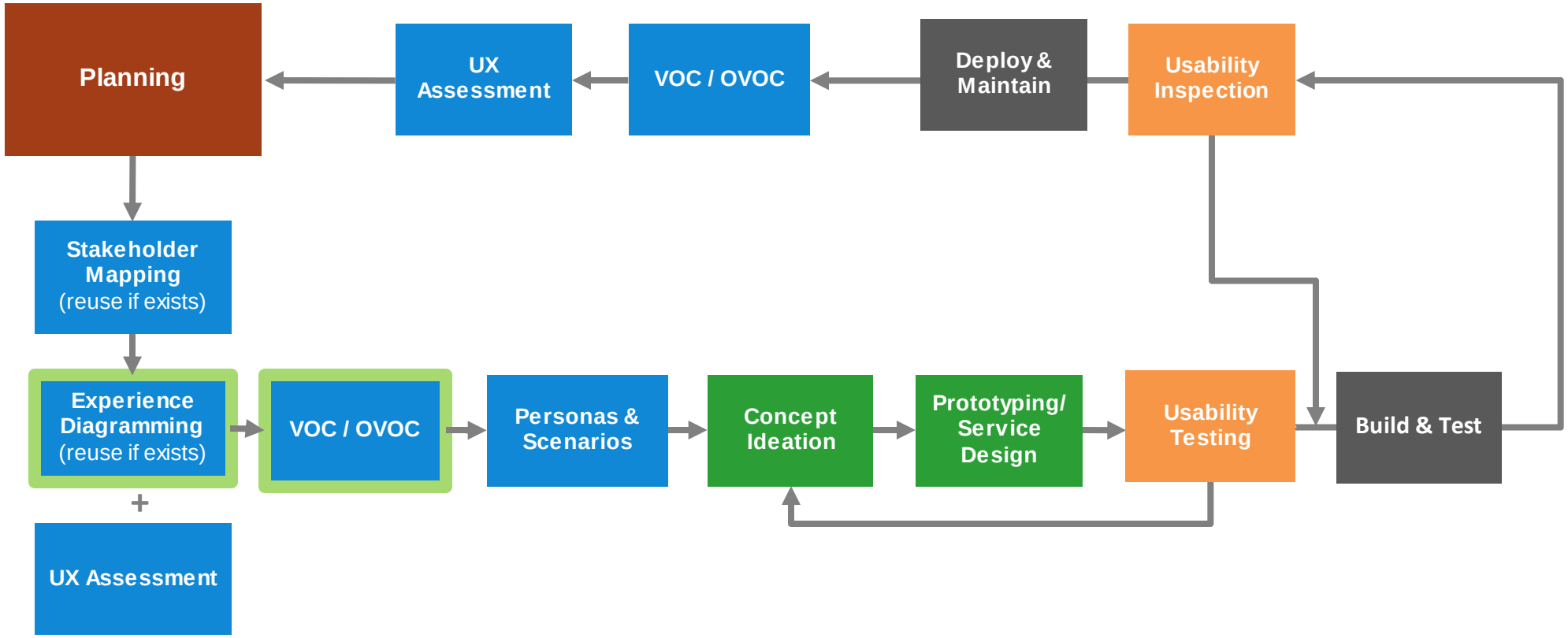
Next Steps



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Resources

More examples of bullseye or onion maps.

- http://www.conceptdraw.com/solution-park/management-stakeholder-onion-diagrams

Templates Used:

- Stakeholder mapping template

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Feedback

- Have your expectations been satisfied?
- What did you like?
- What can we do better?

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The End

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