

**EBOOK**

# **The guide to improving stakeholder engagement**





# Earn stakeholder buy-in with these five steps.

Imagine you've begun a new consulting engagement. The senior leaders of an organization want to take the company in a new direction. They agree on the *why*: The company isn't performing to expectations. But they disagree on *what* to do and *how* to do it.

Your client has brought you on to solve these alignment issues. They want you to help the C-suite come up with a clear business strategy. And they want you to do so while keeping all stakeholders in mind.

You've signed the paperwork and constructed an initial [timeline](#). You've also given the client a project plan and provided deliverables. Now how do you work with these stakeholders to reach a compromise, despite their differences?

**We're here to help. Here are five steps to foster effective stakeholder engagement:**



## STEP ONE

# Identify stakeholder groups.

This seems obvious, but it's surprisingly easy to take for granted. Before anything else, **know who your stakeholders are**. The key to successful stakeholder management is to know who you're working with and how they operate.

Start by [identifying](#) those you'll be working with over the timeline of the engagement. If you're advising the C-suite, which parties do they represent? Are some departments more vocal than others? Do they have existing [consulting pain points](#) from bad past experiences?

Also make use of your principal contact (i.e., your client). It may be the CEO, another senior leader, or a group of individuals. Whoever they are, they're an invaluable liaison between you and various stakeholder groups. Ask your client to walk you through the dynamics of the executive team. What's the personality of each leader, and how does each approach decision-making?

For PI users, the [PI Behavioral Assessment™](#) provides a quick and easy way to understand people's behavioral drives and needs. For example, you may find that certain stakeholders like to assert their opinion, while others are more collaborative. You may also identify stakeholders that act fast and loose—and others that dot every I and cross every T.

A successful consulting engagement hinges on knowing your audience. If you understand the behavioral backgrounds of those involved, it becomes easier to strike a meaningful compromise.





## STEP TWO

# Survey stakeholders on business strategy.

Once you've identified your stakeholders, get a feel for their strategic vision. Set up a way to collect candid feedback from the team. You can do this through a survey like the [PI Strategy Assessment™](#).

Have stakeholders share their ideal direction for the company. It helps to have them communicate this in explicit, practical terms.

For example, the Strategy Assessment asks stakeholders to pick from 20 strategic statements. Examples include *Set up a new team or department that will help expand our business and* *Implement new systems or processes*. The Strategy Assessment then has stakeholders rate their confidence level in the company's ability to execute each strategy.

By gathering this data, you give yourself a way to measure the strategic priorities of senior leadership—and see where there's agreement and disagreement among the team.



## STEP THREE

# Analyze and prepare the results.

Examine the results of the survey. Did most or all stakeholders agree on certain statements to prioritize? Did they agree on what *not* to pursue?

Areas of alignment are great. If senior leadership already has some common ground, that makes engaging stakeholders that much easier. The hard part is gaining alignment on areas where the project team is split.

When facing dissent among senior leadership, the key is to be prepared. Familiarize yourself with the data ahead of the next project meeting. Think back to the individual stakeholders and who they represent. Anticipate who will be open to discussion—and those who may become blockers.

[PI Team Work Styles](#) can help with this. The tool lets you plot the behavioral profiles of any stakeholders who took the Behavioral Assessment. It also lets you see how these individuals communicate and make decisions relative to the larger team. That way, you can predict—and plan for—potential conflict between team members.



## STEP FOUR

# Present your findings.

After you've prepared, bring the stakeholders together. Go over the results of the Strategy Assessment and show where there's alignment for certain strategic statements. Have the C-suite voice any concerns they have about fulfilling these goals.

Also show where there's misalignment. There likely won't be an easy resolution for these issues. But you can guide stakeholders through this process.

For example, keep in mind the behaviors in the room. While those that are more assertive may be inclined to speak, make sure those who are more collaborative by nature have a chance to be heard. When in doubt, your client will be a useful ally. Don't be afraid to let them help mediate these difficult discussions.

By having this healthy conflict, you ensure stakeholders exit each project meeting in greater agreement than they were before.





## STEP FIVE

# Implement the strategy.

Once stakeholders have an agreed-upon business strategy, they'll be able to see it through with confidence. This starts by assessing whether or not the senior team is behaviorally-suited to execute the new business strategy.

For example, say the strategy calls for process-oriented leaders. If all of the C-suite are big-picture thinkers, propose a deliverable that'll get process-heavy employees in those leadership seats. That way, you ensure you have the right people on the team to execute the strategy.

Effective project management is key. When delivering an [implementation plan](#), be clear on who the project sponsors and long-term stakeholders are. Give realistic timelines and set reasonable expectations.

Be sure to provide regular check-ins with your client and these stakeholders. Keep their feedback in mind—and update them throughout the process.



# Use these engagement approaches during your next project.

Stakeholder engagement is a process well worth pursuing. When stakeholders agree on strategy, it helps those down the organization focus on what matters so the company achieves its goals. This pays dividends for your clients in the long term. It also puts you top of mind for future engagements.

Looking to provide more value for your clients? Download our [Ultimate consultant toolkit](#) for nine of our best resources. Or, if you're looking to expand your consulting toolbox, consider becoming a PI Certified Partner.

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