Project Stakeholder Management

Tools and Templates

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Stakeholder Power Grids

Instructions: Plot your stakeholders using any two of the listed dimensions.

- **Influence:** The stakeholder's active involvement in the project.
- **Impact:** The stakeholder's ability to effect changes to the project's planning or execution.
- **Power:** The stakeholder's level of authority or ability to impose his/her will on project decisions.
- **Interest:** The stakeholder's level of concern about this project.
- **Support:** The stakeholder's level of desire to have this project be successful.

HIGH	**1. Keep Satisfied**	**2. Manage Closely**
INFLUENCE (Active involvement in the project.)	**3. Keep Informed**	**3. Keep Informed and Engaged**
LOW	LOW **IMPACT** (Ability to effect changes to the project's planning or execution.) HIGH	

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Stakeholder Engagement Matrix

The Stakeholder Engagement Matrix helps you drive stakeholder engagement by plotting your desired destination for each stakeholder. This enables you to then drive them towards your desired level of their involvement on the project.

Engagement Levels*:

- **Unaware:** The stakeholder is unaware of the project and its potential impact.
- **Resistant:** The stakeholder is aware of the project and potential impacts and does not want the project to succeed.
- **Neutral**: The stakeholder is aware of the project but does not have any strong opinions one way or the other.
- **Supportive:** The stakeholder is aware of the project and potential impacts and wants the project to succeed.
- **Leading:** The stakeholder is aware of the project and potential impacts and is actively engaged in ensuring the project's success.

Stakeholder Engagement Matrix:

For each stakeholder, mark "C" for the current level and "D" for the desired level of the stakeholder's engagement.

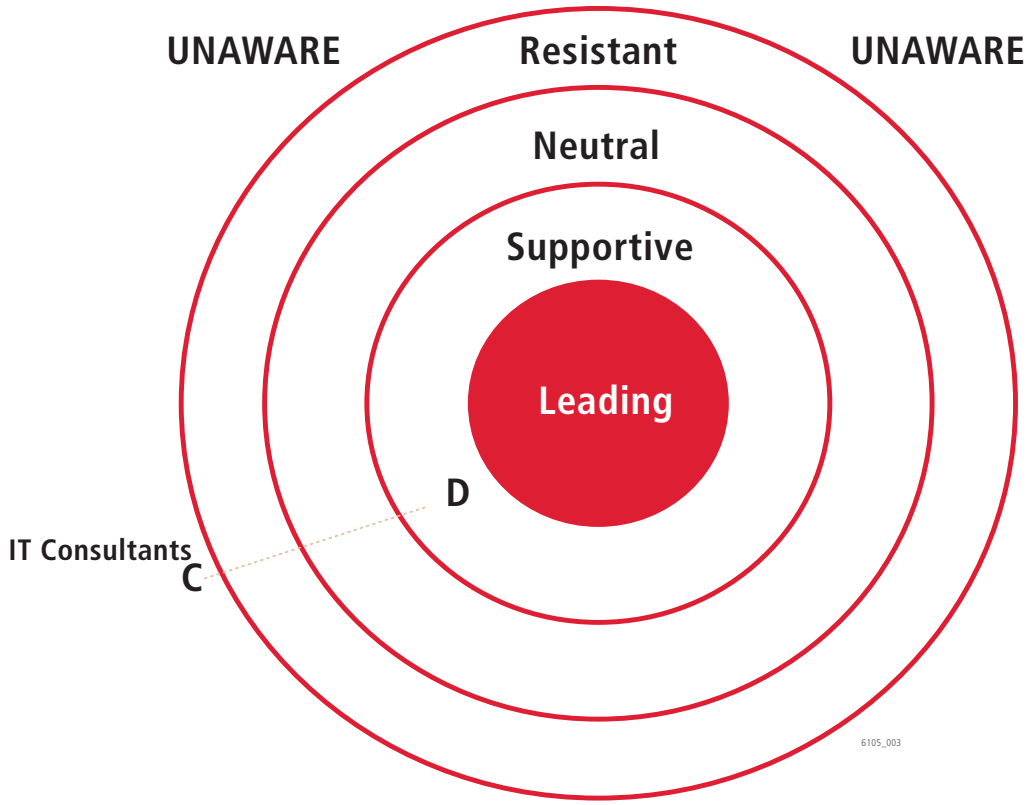
Stakeholder Name (Position)	Unaware	Resistant	Neutral	Supportive	Leading

Project Management Institute, *A Guide to the Project Management Body of Knowledge* (PMBOK® Guide – Fifth Edition), Project Management Institute, Inc., 2013, Figure 13-7, page 403.

* Project Management Institute, *A Guide to the Project Management Body of Knowledge* (PMBOK® Guide – Fifth Edition), Project Management Institute, Inc., 2013, page 402.

Stakeholder Support Diagram

The Stakeholder Support Diagram* provides a more visual representation of the information contained in the Stakeholder Engagement Matrix. The diagram has the added benefit of making it easier to see who is critical for project success. The closer the stakeholder is to the center of the diagram, the more involved and supportive the stakeholder is of the project.



* Adapted with permission: Neville Turbit, Project Perfect Pty Ltd, www.projectperfect.com.au .

Templates: Communications Management Plan

Option 1:					
What	To Whom	By Whom	When	How	Comments

Option 2:					
Affected Stakeholder	Info Needed (Source)	Assigned Team Member	Frequency	Sensitivities	Expected Results

Option 3:			
	CFO	Sponsor	Project Manager
Primary Contact			
Secondary Contact			
Phone			
Email			
Preferred Comm. Mode			
Best Time			
Frequency of Communication			

Outcome Table

Instructions: Use this table to help you prepare for negotiations.

My best outcome:	**My least acceptable outcome:**
Other parties' best outcome: *(List each party separately)*	**Other parties' least acceptable outcome:** *(List each party separately)*

Interests and Positions Table

Instructions: Before negotiations begin, complete the Interests and Positions Table. Rank each according to your priority.

Interests and Positions Table:

My interests:	**My positions:**
Other parties' interests: *(List each party separately)*	**Other parties' positions:** *(List each party separately)*

Template: Evaluation Criteria

Directions for using the template:

1. Agree on acceptable evaluation criteria with your team.
2. Determine an acceptable standard for each criterion. Write it in the form of a question whose answer should be "yes" to meet the standard.
3. Assign a weight to reflect project priorities. Weighting across all criteria should total 100%.
4. For a particular option, ask the Standards questions. If the answer is "Yes," mark it as "1". If the answer is "no," mark it as "0."
5. Multiply the Weight times the Answer to derive a Score for the criterion.
6. Add all the Scores to get a Total Score for the option.
7. The option with the highest Total Score is the best choice for the project.

Criteria	Standards (All answers must be "yes" to be acceptable)	Weight (Priority)	Answer Yes = 1 No = 0	Score (Weight X Answer)
Practicality	Can this be done within given resources and time constraints?			
Complexity of solution	Will this change the original design plans by <20%?			
Acceptability	Will at least 51% of the negotiating team agree to the solution?			
Affordability	Will the maximum increase to the project budget be <10%?			
Link to organizational objectives	Does this help us achieve our project and organizational objectives?			
			Total Score:	

Templates: Status Reports (Option 1)

Status Report for:
For the month of MM/YYYY – MM/YYYY
Major Accomplishments for past month ○ ○ ○
Projected Accomplishments for next month ○ ○ ○
Issues/Concerns ○ ○ ○

Templates: Status Reports (Option 2)

Summary Project Status

Based on the color legend below, indicate green, yellow, or red for the reporting periods of each item. Any item classified as red or yellow requires an explanation in the comment boxes that follow this section. Additional priority items can be added to the list for status reporting.

Select one color in each of the Reporting Period columns to indicate your best assessment of:	Last Reporting Period (MM/DD/YYYY)			This Reporting Period (MM/DD/YYYY)		
1. Overall Project Status	Red	Yellow	Green	Red	Yellow	Green
2. Schedule	Red	Yellow	Green	Red	Yellow	Green
3. Budget (capital, overall project hours)	Red	Yellow	Green	Red	Yellow	Green
4. Scope	Red	Yellow	Green	Red	Yellow	Green
5. Quality	Red	Yellow	Green	Red	Yellow	Green
	Red	Yellow	Green	Red	Yellow	Green
	Red	Yellow	Green	Red	Yellow	Green

Color Legend	
Red	Project has significant risk to baseline cost, schedule, or project deliverables. Current status requires immediate management involvement.
Yellow	Project has a current or potential risk to baseline cost, schedule, or project deliverables. Project manager will manage risks based on risk mitigation planning.
Green	Project has no significant risk to baseline cost, schedule, or project deliverables.
Comments:	

Template: Change Control Form

Requester Name:	*Name/Email of individual requesting change*		
Request Date:			
Change Description			
Reason for Change:	*Clearly define the business reasons for implementing the change, including names/emails of any critical players*		
Change Impact:	*Specific savings/revenues to be realized as a result of the change or behavioral improvements promoted by the change*		
Need by Date:		**Approved for Analysis:**	
Functional Impact of Change:	**Functional Area affected:** *Name of Functional Organization* **Functional Area affected:** *Name of Functional Organization*		
Schedule Impact:	**# Days:**	**Cost Impact:**	**$**
Approved by:	Name/Email of approving authority		
Signature:			
Denied by	Name/Email of responsible authority		
Signature:			
Deferred by:	Name/Email of responsible authority		
Deferral Review Date:			
Signature:			

Template: Change Request Log

Request Date	Requested Change	Requester	Assigned To	Impact Assessment	Current Progress	Priority	Due Date	Open/ Closed