

## PMP® Bootcamp Student Worksheet: Stakeholder Engagement Essentials

Student Name: \_\_\_\_\_ Date: \_\_\_\_\_

### Welcome to Stakeholder Engagement!

Think of a project as throwing a party. Who do you need to talk to for it to be a success? The guests of honor (your customer), the people paying for it (your sponsor), the caterers and DJ (your team and vendors), and even the neighbors who might complain about the noise! All of these people are your **stakeholders**. If you don't communicate with them effectively, your party (your project) could fail.

This worksheet will guide you through the essentials of identifying, analyzing, and planning how to work with these crucial people.

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### Part 1: The "What" and "Why"

#### 1. Key Definitions

Let's start with the basic vocabulary.

- **Stakeholder:** Any individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of the project.
  - **Simple terms:** Anyone who has a "stake" in your project's success or failure.
- **Stakeholder Engagement:** The process of developing and maintaining relationships with stakeholders to meet their needs and expectations, address issues as they occur, and foster appropriate stakeholder involvement in project activities and decisions.
- **Stakeholder Analysis:** The process of systematically gathering and analyzing quantitative and qualitative information to determine whose interests should be taken into account throughout the project.

**Instructor's Insight (RMC Style):** Don't just "manage" your stakeholders; *engage* them. The new PMP standard emphasizes building collaborative relationships. It's about working *with* people, not doing things *to* them. This shift in mindset is critical for the exam and for real-world success.

#### 2. Stakeholder Engagement Overview (PMBOK 7 Performance Domain)

Stakeholder Engagement is not a one-time task; it's a continuous process throughout the entire project lifecycle. It involves:

1. **Identify:** Who are our stakeholders?
2. **Understand & Analyze:** What do they want? How much influence do they have?

3. **Plan:** How will we communicate and work with them?
4. **Engage:** Put the plan into action! Communicate, listen, and collaborate.
5. **Monitor:** Is our plan working? Are stakeholder needs changing? Adjust as needed.

### 3. Desired Outcomes (Why We Do This)

Successful stakeholder engagement isn't just "nice to have." It leads to real project benefits:

- **Increased Support & Reduced Resistance:** Engaged stakeholders become champions for your project.
  - **Clearer Requirements:** You understand what the customer *really* wants, leading to less rework.
  - **Proactive Risk Identification:** Stakeholders often see risks you might miss.
  - **Smoother Project Execution:** Fewer surprises and roadblocks from unexpected sources.
  - **Higher Project Success Rate & Customer Satisfaction:** The ultimate goal!
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## Part 2: Identification and Analysis - "Who Are They and What Do They Want?"

This is the investigative phase. You can't engage people if you don't know who they are and what they care about.

### 4. Methods for Stakeholder Identification and Analysis

Method/Tool	Description & How to Use It
<b>Brainstorming</b>	Get your project team and other experts in a room. Ask the simple question: "Who will be affected by this project?" Don't judge any ideas at first—just list everyone you can think of.
<b>Expert Judgment</b>	Talk to people who have done similar projects. Consult with your sponsor, senior leaders, and subject matter experts (SMEs). They know the political landscape and key players.
<b>Reviewing Documents</b>	Look at the <b>Project Charter</b> , contracts, and organizational charts. These documents often explicitly name key stakeholders.

## Power/Interest Grid

**(CRITICAL TOOL!)** This is the most common analysis tool. You plot each stakeholder on a grid based on their level of authority (**Power**) and their level of concern (**Interest**). This tells you *how* to manage them.

### The Power/Interest Grid

	Low Interest	High Interest
High Power	<b>Keep Satisfied</b> (Don't bother them with too much detail, but make sure they are happy. <i>Example: A CEO of the company.</i> )	<b>Manage Closely</b> (These are your key players! Involve them, communicate frequently, and manage their expectations closely. <i>Example: Your project sponsor.</i> )
Low Power	<b>Monitor</b> (Keep an eye on them, but don't spend excess energy. Minimal effort required. <i>Example: An employee in an unaffected department.</i> )	<b>Keep Informed</b> (Keep them in the loop. They can be great allies and early warning signs of issues. <i>Example: The end-users of your product.</i> )
Salience Model	A more advanced model that categorizes stakeholders based on three attributes: <b>Power</b> (ability to impose their will), <b>Urgency</b> (need for immediate attention), and <b>Legitimacy</b> (is their involvement appropriate?). This helps prioritize stakeholders when you have many.	

## 5. Artifacts of Stakeholder Identification and Analysis

The main output of this work is the **Stakeholder Register**.

- **What is it?** A project document including the identification, assessment, and classification of project stakeholders.
- **What's in it?**
  - **Identification Info:** Name, role, contact details.
  - **Assessment Info:** Key requirements, expectations, potential influence on the project.

- **Classification:** Where they fall on the Power/Interest Grid (e.g., "Manage Closely," "Keep Satisfied").

**Think About It:** Imagine your project is to install a new coffee machine in the office breakroom. Who are 3-4 key stakeholders? Where would you place them on the Power/Interest Grid and why?

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### Part 3: Planning the Engagement - "How Will We Work Together?"

Once you know *who* your stakeholders are, you need a proactive plan for *how* you will engage them.

#### 6. Methods for Stakeholder Engagement Planning

The key is to tailor your approach. You don't communicate with the CEO in the same way you communicate with a team member.

Method/Tool	Description & How to Use It
Expert Judgment	Again, rely on experienced leaders and PMs. Ask them, "What's the best way to engage this group?"
Stakeholder Engagement Assessment Matrix	<b>(CRITICAL TOOL!)</b> This matrix helps you figure out where your stakeholders are now and where you need them to be.

#### Stakeholder Engagement Assessment Matrix

You map each stakeholder's **Current (C)** engagement level and their **Desired (D)** level for project success. Your plan is to close the gap between **C** and **D**.

Level	Description
Unaware	Not aware of the project or its potential impacts.
Resistant	Aware of the project, but resistant to the change it will bring.
Neutral	Aware of the project, but neither supportive nor resistant.
Supportive	Aware of the project and supportive of the change.

**Leading**      Aware of the project and actively engaged in ensuring its success.

- **Example:** Your IT Security Manager is currently **Neutral (C)** about your software project. For the project to succeed, you need them to be **Supportive (D)** by helping to clear security hurdles. Your engagement plan for them will include actions to move them from Neutral to Supportive (e.g., one-on-one meetings, involving them in security planning).

## 7. Artifacts of Stakeholder Engagement Planning

The primary output of this process is the **Stakeholder Engagement Plan**.

- **What is it?** A component of the project management plan that identifies the strategies and actions required to promote productive involvement of stakeholders in project decision-making and execution.
- **What's in it?**
  - Engagement strategies for different stakeholder groups (e.g., how to close the C -> D gap).
  - The scope and impact of the project on stakeholders.
  - Communication requirements (how often, what format, what content).
  - A plan for how the Stakeholder Engagement Plan itself will be updated as the project progresses.

**Instructor's Insight (RMC Style):** Remember, the Stakeholder Register and the Stakeholder Engagement Plan are **LIVING DOCUMENTS**. You must review and update them regularly, especially when the project enters a new phase, a key stakeholder changes, or the project environment shifts. What you plan at the beginning will almost certainly need to be adjusted.

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## Final Takeaways & Discussion

- **People First:** Stakeholder engagement is fundamentally about understanding and communicating with people.
- **Be Proactive:** Don't wait for problems to arise. A good plan anticipates stakeholder needs and concerns.
- **It's All Connected:** How you engage stakeholders directly impacts your project's requirements, risks, schedule, and ultimately, its success.

**Activity/Discussion Point:**

Think of a simple project from your personal life (e.g., planning a vacation, moving to a new apartment, or organizing a family event).

1. Who were the key stakeholders?
2. Was there a stakeholder you didn't identify early on who caused problems later?
3. How could a simple Stakeholder Register and Engagement Plan have made the process smoother?