The Four Fictional Faces of Scaled Stakeholder Management

Drew Jemilo
Scaled Agile, Inc.
drew.jemilo@scaledagile.com
July 26, 2016
About Drew Jemilo

- Co-founder of Scaled Agile, Inc., SAFe Fellow, and Principal Consultant
- “Hands-on” as a software developer, architect, manager, and IT director
- Consultant and coach – Lean startups to the Fortune 100
- Fell in love with adaptive methods (RAD) in 1991
- And… love to trail run with my dog (I moved to Colorado last year)

Twitter
@drewjemilo

LinkedIn
linkedin.com/in/drewjemilo

SlideShare
www.slideshare.net/jemilod
Agenda

- Understanding the Challenge
- Applying a Systematic Stakeholder Management Framework
- Identifying Stakeholders
- Analyzing Stakeholders with Stakeholder Maps
- Prioritizing Stakeholders with NPS
- Tuning Stakeholder Engagement with DISC
- Defining Your Stakeholder Engagement Plan
- Communicating… Often!
- Managing Expectations
- Scaling
Understanding the Challenge
How would you characterize this stakeholder?

www.youtube.com/watch?v=2PjZAeiU7uM
The Challenge

Why is stakeholder management so difficult?

**There’s misalignment**
- Conflicting priorities
- Unshared vision

**There’s politics**
- “I want to win!”
- History of conflict
  - Product Mgmt vs. Development
    “I want it now”
  - The Business vs. Architecture
    “We can’t afford to invest in architecture”
The Challenge

You may be the messenger...
- At some point, you will need to give bad news
- You will need to say no

Your stakeholders will change over time
- At any given point, you may not know who they all are
- We need a systematic approach to identify and prioritize
Applying a Systematic Stakeholder Management Framework
Stakeholder engagement is managing the expectation of anyone who has an interest in a program or will be affected by its deliverables or outputs.
Building a Stakeholder Management Toolbox

Stakeholder Mapping

DISC Personality Assessment

Net Promoter Score (NPS)
Identifying Stakeholders
Identify Stakeholders

Many of your stakeholders may not initially be obvious

Consider those who have...

- The ability to impact your project
- The ability to enhance your project (SMEs)
- The ability to slow down your projects (e.g., teams or groups you depend on)
- The ability to remove impediments
- The ability to lead opinions
- The ability to facilitate the change resulting from your project
- The ability to provide “a voice of reason”
Identify Stakeholders

Some may easily be overlooked

Don’t forget external influences

- Subcontractors
- Suppliers
- Competitors
- Regulatory agencies

Remember those who have to live with the solution

- IT Ops
- Production support
The 4 (not so) Fictional Faces

CONTEXT: In our examples, we’ll be discussing the stakeholders of a Lean-Agile transformation
Meet Felipe

- Senior VP of Engineering
- Owns the success of the Lean-Agile transformation (his next promotion depends on it)
- Wants to know when he can declare victory
- And… Felipe is a CrossFit enthusiast! Yeaahhhhhhhhhhh!!!

“What are you waiting for? Let’s transform!”
Meet Tiffany

- New, upbeat director of Product Management – the rising star! And she gets Agile!
- Major influencer of her boss’ support for the transformation
- A typical day consists of a breakfast meeting in Singapore and a dinner meeting in Beijing
- And… Tiffany has a huge social circle but gets angry when her friends forget to include her

“Gotta run. Keep me in the loop!”
Meet Sanjay

- Seasoned Scrum Master who has stabilized many "distressed" teams
- In line to become the Release Train Engineer for the upcoming Agile Release Train launch
- First to organize team activities
- Shuttle diplomat to keep the peace
- And… Sanjay is a proud (and exhausted) new father who feels like he’s letting his family down by working so much

“Let me know how I can help.”
Meet Lin

- PMO Director who owns the budget for the Lean-Agile transformation
- Dislikes Agile’s “sloppy” approach and wants the transformation KPIs ASAP
- Schedule is overbooked with strategy meetings, leaving her little time to meet with you
- And... Lin just received a Culinary Arts Degree from Le Cordon Bleu in Atlanta

“Thanks for your opinion. I recommend a different approach.”
Identify Stakeholders

- Discuss stakeholders of your Lean-Agile transformation
- Compile a list of their names and roles

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winona</td>
<td>Dev Manager</td>
</tr>
<tr>
<td>Pedro</td>
<td>VP of Finance</td>
</tr>
<tr>
<td>...</td>
<td></td>
</tr>
</tbody>
</table>
Analyzing Stakeholders with Stakeholder Maps
The Stakeholder Map

What is it?

- Provides a framework for managing stakeholders based on interest and influence
- Y-axis sometimes labeled “Power” (but can be a charged term)
- X-axis sometimes just labeled “Interest” (but who likes to be thought of as disinterested?)
The Stakeholder Map

High Influence  
High Interest

- Business owners and others with significant decision-making authority
- Typically easy to identify
- Can kill, sustain, or nurture the effort
- They’re typically easy to actively engage. Set up consistent touch points.

<table>
<thead>
<tr>
<th>Influence</th>
<th>Interest / Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>Keep Satisfied</td>
</tr>
<tr>
<td>Low</td>
<td>Monitor</td>
</tr>
<tr>
<td></td>
<td>Actively Engage</td>
</tr>
<tr>
<td></td>
<td>Keep Informed</td>
</tr>
</tbody>
</table>
The Stakeholder Map

### High Influence
- Those with significantly decision-making authority
- Lacks the availability or interest to be actively engaged
- It is usually difficult to have consistent touch points. Do whatever is needed to keep them satisfied.

---

Interest / Availability

- **High Influence**
  - Keep Satisfied
  - Actively Engage
- **Low Influence**
  - Monitor
  - Keep Informed

- **High Interest**
  - Actively Engage
  - Keep Satisfied
- **Low Interest**
  - Monitor
  - Keep Informed
The Stakeholder Map

Low Influence
High Interest

- May be impacted by the effort but have little influence
- May want more of your time than you can give
- Find efficient ways to communicate and keep them informed
  - Email updates
  - Presentations
  - Publicity campaigns

Keep Satisfied
Actively Engage
Monitor
Keep Informed

Influence

Interest / Availability
### Low Influence

#### Low Availability

- They aren’t (and don’t expect to be) significantly involved
- They may not even be aware of your project... and may not want another email in their inbox!
- Know who they are
- Monitor them and be aware if they move into other quadrants
Business owners and major stakeholders must participate in PI Planning and the Inspect & Adapt workshops to review and agree upon the PI plan and the planned vs. actual progress.

Major stakeholders should also be involved in the System Demos.

Major stakeholders may be engaged between Sprint Demos for input.

Minor Stakeholders are engaged as required in order to keep them informed.

Subject Matter Experts are engaged as required for input.

- Business owners and major stakeholders must participate in PI Planning and the Inspect & Adapt workshops to review and agree upon the PI plan and the planned vs. actual progress.
- Major stakeholders should also be involved in the System Demos.
- Major stakeholders may be engaged between Sprint Demos for input.
- Minor Stakeholders are engaged as required in order to keep them informed.
- Subject Matter Experts are engaged as required for input.
Business owners and major stakeholders must participate in PI Planning and the Inspect & Adapt workshops to review and agree upon the PI plan and the planned vs. actual progress.

Major stakeholders should also be involved in the System Demos.

Major stakeholders may be engaged between Sprint Demos for input.

Minor Stakeholders are engaged as required in order to keep them informed.

Subject Matter Experts are engaged as required for input.

The Stakeholder Map
Exercise: Create your stakeholder map

- Using flip chart paper and stickies, create a stakeholder map for your stakeholders.

**Color coding**
- **Red** = Business Owner
- **Yellow** = Major Stakeholder
- **Green** = Minor Stakeholder
- **Orange** = Subject Matter Expert

**Stickie**
- Name - Role

---

© 2016 Scaled Agile, Inc. All Rights Reserved.
Prioritizing Stakeholders with NPS
Prioritize Stakeholders

Don’t prioritize based on who can scream the loudest

It’s...
- Role
- Influence
- Interest/availability

It’s also their perception and attitude
- Listen to them
- Get context from others
- Conduct an NPS survey
Stakeholder Satisfaction with NPS

Net Promoter Score (NPS) is a simple, widely accepted survey technique

- Gauges loyalty
- Is very simple
- Is an alternative to traditional customer satisfaction surveys
Stakeholder Satisfaction with NPS

An NPS survey consists of one simple question:

“How likely is it that you would recommend _______?”

On a scale of 0 – 10:
9-10 are Promoters | 7-8 are Passives | 0-6 are Detractors

NPS = (% of Promoters) – (% of Detractors)

A positive NPS is considered good; 50+ is considered excellent
Add NPS to help prioritize!
The Stakeholder Map and NPS

Promoters may...

- Protect you from politics and negative influences
- Remove impediments
- Secure incremental funding
- Sway opinions in a positive direction

Keep them close!
The Stakeholder Map and NPS

Detractors may...
- Find faults
- Delay approvals
- Provide little support
- Be overly controlling
- Reassign resources
- Sway opinions in a negative direction
- Start a competing project
- Pull the plug!

Keep them closer!
The Stakeholder Map and NPS

Promoters may...
- Become more interested and available

Detractors may...
- Avoid you
- Delay feedback
- Delay approvals (intentionally or unintentionally)
- Drop in, give unexpected feedback, and leave
The Stakeholder Map and NPS

Promoters may...
- Sway opinions in a positive direction
- Want to become even more involved

Detractors may...
- Sway opinions in a negative direction
The Stakeholder Map and NPS

**Promoters may...**
- Move to another quadrant

**Detractors may...**
- Excuse themselves from the water cooler when the topic of your project comes up
Our Stakeholders’ NPS

How likely is it that you would recommend a Lean-Agile transformation as a game-changer to a friend or colleague?

Felipe  Tiffany  Sanjay  Lin

Promoter  Promoter  Passive  Detractor
Exercise: Prioritize your stakeholders

- On your post-its, use emoticons to indicate promoters, passives, and detractors
- Mark with an asterisk those stakeholders you would expedite
- Be ready to discuss your criteria for expediting

Name - Role

😊 = Promoter

😊 = Expedite

😊 = Passive

😊 = Detractor
Tuning Stakeholder Engagement with DISC
Personality Type History

Throughout history, philosophers and scientists have defined basic personality types with surprising similarities.

<table>
<thead>
<tr>
<th>Date</th>
<th>Type 1</th>
<th>Type 2</th>
<th>Type 3</th>
<th>Type 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Empedocles</td>
<td>400 BC</td>
<td>Fire</td>
<td>Air</td>
<td>Water</td>
</tr>
<tr>
<td>Hippocrates</td>
<td>460 BC</td>
<td>Yellow Bile</td>
<td>Blood</td>
<td>Phlegm</td>
</tr>
<tr>
<td>Galen</td>
<td>131 AD</td>
<td>Choleric</td>
<td>Sanguine</td>
<td>Phlegmatic</td>
</tr>
<tr>
<td>DISC</td>
<td>1920s</td>
<td>Dominant</td>
<td>Influential</td>
<td>Steady</td>
</tr>
<tr>
<td>Jungian</td>
<td>1940s</td>
<td>NF</td>
<td>SP</td>
<td>NT</td>
</tr>
<tr>
<td>Keirsey</td>
<td>1960s</td>
<td>Idealist</td>
<td>Artisan</td>
<td>Rational</td>
</tr>
<tr>
<td>Handy</td>
<td>1990s</td>
<td>Apollo</td>
<td>Dionysus</td>
<td>Athena</td>
</tr>
</tbody>
</table>

Source: www.volunteertoday.com/PDF/PersonalityTypeshistory.pdf
Adding DISC

Add DISC to refine how you engage!
DISC Personality Characteristics

**Dominance**
- Outgoing
  - Task-oriented

**Influence**
- People-oriented
  - Reserved

**Conscientious**

**Steadiness**

Learn more: [http://www.discprofile.com](http://www.discprofile.com), etc.
DISC Personality Characteristics

**Dominance**
- Direct
- Forceful
- Results-oriented
- Firm
- Strong-willed

**Outgoing**

**Task-oriented**

Learn more: [http://www.discardprofile.com](http://www.discardprofile.com), etc.

Felipe
DISC Personality Characteristics

Tiffany

Outgoing

People-oriented

Influence
- Outgoing
- Optimistic
- Enthusiastic
- High-Spirited
- Lively

Learn more: http://www.discprofile.com, etc.
DISC Personality Characteristics

Sanjay

Reserved

People-oriented

Steadiness
- Even-tempered
- Patient
- Accommodating
- Humble
- Tactful

Learn more: [http://www.discprofile.com](http://www.discprofile.com), etc.
DISC Personality Characteristics

- Conscientious
  - Analytical
  - Precise
  - Systematic
  - Reserved
  - Private

Task-oriented

Reserved

Learn more: [http://www.discprofile.com](http://www.discprofile.com), etc.
Summary - DISC Personality Characteristics

**Dominance**
- Direct
- Forceful
- Results-oriented
- Firm
- Strong-willed

**Influence**
- Outgoing
- Optimistic
- Enthusiastic
- High-Spirited
- Lively

**Conscientious**
- Analytical
- Precise
- Systematic
- Reserved
- Private

**Steadiness**
- Even-tempered
- Patient
- Accommodating
- Humble
- Tactful

Learn more: [http://www.discprofile.com](http://www.discprofile.com), etc.
Exercise: Further Understand Your Stakeholders

- Using the previous slide as a guide, classify your stakeholders using the DISC personality model.

<table>
<thead>
<tr>
<th>Name - Role</th>
<th>D = Dominance</th>
<th>I = Influence</th>
<th>S = Steadiness</th>
<th>C = Conscientious</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image.png" alt="Image" /></td>
<td><img src="image.png" alt="" /></td>
<td><img src="image.png" alt="" /></td>
<td><img src="image.png" alt="" /></td>
<td><img src="image.png" alt="" /></td>
</tr>
</tbody>
</table>
Working with DISC Personalities

Dominance

- **Likes:** Taking action, getting results, challenging situations
- **Dislikes:** Losing control, being taken advantage of, being vulnerable
- **Motivators:** Power, competition, winning, success

Felipe

© 2016 Scaled Agile, Inc. All Rights Reserved.
Working with DISC Personalities

Influence
- **Likes:** Taking action, building collaboration, expressing enthusiasm
- **Dislikes:** Being ignored or rejected, loss of influence, disapproval
- **Motivators:** Being recognized, team activities, friendly relationships

Tiffany
Working with DISC Personalities

Conscientious

- **Likes:** Accuracy, stability, testing assumptions
- **Dislikes:** Criticism, sloppiness, being wrong
- **Motivators:** Gain and apply expertise, promote quality
Working with DISC Personalities

Sanjay

Steadiness

- **Likes**: Providing support, maintaining stability, enjoying support
- **Dislikes**: Loss of stability and harmony, offending others
- **Motivators**: stable environments, appreciation, cooperation, helping others
Summary - Working with DISC Personalities

**Dominance**
- **Likes:** Taking action, getting results, challenging situations
- **Dislikes:** Losing control, being taken advantage of, being vulnerable
- **Motivators:** Power, competition, winning, success

**Influence**
- **Likes:** Taking action, building collaboration, expressing enthusiasm
- **Dislikes:** Being ignored or rejected, loss of influence, disapproval
- **Motivators:** Being recognized, team activities, friendly relationships

**Conscientious**
- **Likes:** Accuracy, stability, testing assumptions
- **Dislikes:** Criticism, sloppiness, being wrong
- **Motivators:** Gain and apply expertise, promote quality

**Steadiness**
- **Likes:** Providing support, maintaining stability, enjoying support
- **Dislikes:** Loss of stability and harmony, offending others
- **Motivators:** stable environments, appreciation, cooperation, helping others
Exercise: Refine Your Communication

- Select a few of your stakeholders
- Using the summary on the previous slide, discuss how you would refine your communication
Defining Your Stakeholder Engagement Plan
Engaging Stakeholders

Now that we’ve identified our stakeholders, we need to define how we’ll be interacting with them

- Determine your touch points
  - One-on-one conversations
  - Standing meetings
  - Team-level ceremonies and program-level events
  - Workshops
- Define the objectives
- Set the frequency
Leverage traditional tools along with custom engagement methods

- A Requirements Workshop
- Brainstorming Sessions
- Interviews
- Questionnaires
- User Experience Mock-Ups
- Use Case Modeling

Sample Stakeholder Engagement Plan

A stakeholder map can drive the type and frequency of interactions, e.g., one-on-one conversations, invitations to ceremonies/events, and workshops.

<table>
<thead>
<tr>
<th>Person / Group</th>
<th>Samples – Engagement Methods / Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Owner</td>
<td>Bob Ollis</td>
</tr>
<tr>
<td></td>
<td>• One-on-one meetings to discuss Vision, Roadmap, and Features prior to each PI Planning meeting</td>
</tr>
<tr>
<td></td>
<td>• Attendance at requirements workshops as needed</td>
</tr>
<tr>
<td></td>
<td>• Attendance at the PI Planning meeting</td>
</tr>
<tr>
<td></td>
<td>• Attendance at the PI Inspect and Adapt workshop</td>
</tr>
<tr>
<td></td>
<td>• Email communication when program scope is at risk</td>
</tr>
<tr>
<td>Major Stakeholder</td>
<td>Mary Smith</td>
</tr>
<tr>
<td></td>
<td>• Attendance at discover workshops</td>
</tr>
<tr>
<td></td>
<td>• Preview of the prioritized backlog prior to the PI Planning meeting</td>
</tr>
<tr>
<td></td>
<td>• Attendance at the PI Inspect and Adapt workshop as needed</td>
</tr>
<tr>
<td></td>
<td>• Attendance at the System and Solution Demo</td>
</tr>
<tr>
<td></td>
<td>• Attendance at the Team Iteration Demo (optional)</td>
</tr>
<tr>
<td></td>
<td>• Email communication when Iteration or program scope is at risk</td>
</tr>
<tr>
<td>Minor Stakeholder</td>
<td>Mike Schnitzel</td>
</tr>
<tr>
<td></td>
<td>• Informed through iteration ceremonies as needed</td>
</tr>
<tr>
<td>Subject Matter Expert</td>
<td>Sam M. Edwards</td>
</tr>
<tr>
<td></td>
<td>• Pulled into Iteration ceremonies as needed</td>
</tr>
<tr>
<td></td>
<td>• Pulled into individual or group SME meetings as needed</td>
</tr>
</tbody>
</table>
Exercise: Draft Your Plan

Draft your stakeholder engagement plan for your team (Product Owners) or program (Product Managers).

<table>
<thead>
<tr>
<th>Role</th>
<th>Person / Group</th>
<th>Engagement Methods / Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Owner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Major Stakeholder</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subject Matter Expert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minor Stakeholder</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

20 min
Communicating... Often!
Begin with Rights and Responsibilities

Stakeholders not only have rights in an Agile environment but they have responsibilities as well.

**Rights**
- Have an engaged team
- Be informed of the team’s progress
- Receive good-faith estimates
- Be educated on technical and architectural factors that impact estimates
- Receive Lean-Agile training and coaching

**Responsibilities**
- Remain engaged from the definition to the completion of the work
- Provide ongoing feedback and support
- Define and clarify requirements
- Collaborate with the Product Owner
- Contribute to the growth of a trusting Agile environment
Managing Expectations
Managing Expectations

Managing expectations can be challenging, especially in an Agile world

Be prepared for questions from those not familiar with Agile

- “What do you mean you can’t commit to what I’m getting six months from now?”
- “Can you squeeze it in? It’s really small.”
- “Why are you wasting time on architecture and refactoring?”

What else?
Build Trust

- Keep your promises to your team and to your Customers
  - Iteration Goals and PI Objectives
  - Try not to change priorities mid-iteration
- Communicate openly and honestly
  - Working agreements/team norms can help establish rules for good working relationships
- Know each other personally
  - Whether collocated or remote, try to attend ceremonies and communicate visually
  - Avoid email!
- Don’t place blame, but encourage accountability
  - Blame is assigned; accountability is owned
Scaling
Scaling Stakeholder Management

The same techniques apply, regardless of where you are in the organization.
Decentralized Stakeholder Management

SAFe Lean-Agile principles

- #1-Take an economic view
- #2-Apply systems thinking
- #3-Assume variability; preserve options
- #4-Build incrementally with fast, integrated learning cycles
- #5-Base milestones on objective evaluation of working systems
- #6-Visualize and limit WIP, reduce batch sizes, and manage queue lengths
- #7-Apply cadence, synchronize with cross-domain planning
- #8-Unlock the intrinsic motivation of knowledge workers
- #9-Decentralize decision-making

1. **Roles**
   Who is the stakeholder manager?

2. **Stakeholders**
   Who has the influence and interest?

3. **Backlog level**
   Who manages what level of detail?

4. **Capacity allocation**
   How do we allow time for architectural investments?

5. **Touch points**
   At which ceremonies and events do we engage our stakeholders?
Summary

Today, we:

- Understood the stakeholder challenge
- Applied a systematic stakeholder management approach
- Identified stakeholders
- Analyzed stakeholders with stakeholder maps
- Prioritized stakeholders with NPS
- Tuned stakeholder engagement with DISC
- Defined a stakeholder engagement plan
- Discussed the importance of frequent communication
- Learned the importance of managing expectations
- Discussed the principles behind scaling