

Stakeholder Engagement

With Kathy Berkidge

On the 2nd April 2021, [Kathy Berkidge](#) joined me on an edition of 'On The Spot' to discuss the important topic of *stakeholder engagement*. [You can see the original broadcast here](#). If you'd rather read an edited transcript of our discussion you'll find that below. You can view previous episodes by visiting [onthespot.today](#).



[Kathy Berkidge](#)
Mind at Work Consulting



[Adrian Reed](#)
Blackmetric

Please note, this is an edited version of an automated transcription. We apologise for any mis-transcriptions or typos! -- *Adrian*

.....

Adrian Reed: Well hello, and welcome to this episode of "On The Spot", the coffee-break shaped episode discussing all things related to business analysis, business change and everything in between. I'm really pleased to say that today we are joined by Kathy Berkidge, an agile and business analysis trainer, coach, speaker and many other things besides. So, Kathy, thanks very much for being here today.

Kathy Berkidge: Thanks for having me, Adrian, great to be here.

Adrian Reed: Today we're going to be talking about stakeholder engagement. As business analysts, we work with stakeholders every single day, probably remotely at the moment but also in person at other times, and we hear this term "stakeholder engagement" bandied about a lot. So my first question for you, Kathy, is what does stakeholder engagement really mean?

Kathy Berkidge: Well, if you ask five different BAs, they'll tell you five different things! But for me, it's really not meant to be a process, step by step, but it's a process where we plan, analyse, execute, and review the way that we work with other people, otherwise known as stakeholders. We want them to support us and be prepared to contribute and be willing to talk to us about their needs, their acceptance criteria, or what's important for them. We want them to be willing to work with us. So when we do stakeholder engagement, it's really about that way that we plan, and also prepare ourselves to be able to work well with them. So they are engaged, and of course, bought into the work that we're doing.

Adrian Reed: Absolutely, understanding them and their needs. So Kathy, we've talked about stakeholder engagement and what it means. I'm sure what many people watching will be thinking is: "but how do we achieve that?" So do you have any tips for engaging better with stakeholders?



blackmetric

www.blackmetric.com

Kathy Berkidge: Well, it really starts with understanding them and their needs, and understanding how their communication style and what's important for them meshes with our communication style, and how where we go about our work. So there needs to be a real meeting of the worlds so we can understand how best we can understand and relate to one another.

Adrian Reed: That mutual understanding is really, really important. One thing I know we've talked about in the past, Kathy is the Stakeholder Engagement Canvas. When I first saw this, this was one of those tools that just really resonated with me. It was a tool that I thought "yes this is the thinking tool that I've been looking for, to help me to think about different approaches and aspects of stakeholder engagement". I was wondering if you could briefly talk us through that.

Kathy Berkidge: When I think about my stakeholder engagement processes, I always think of the power interest matrix or RACI diagrams. Plus we've got a few other really great tools. But those tools don't really help me to get in the heads and in the hearts of my stakeholders. We work with the lean canvas with the business model canvas, we work with all sorts of different canvases, wouldn't that be great if we could have a way to really structure our thinking the same way that the lean canvas does? So the Stakeholder Engagement Canvas is really that way for us to brainstorm our own thoughts around our stakeholder engagement process. So it gives us that deeper level of stakeholder analysis. beyond what you have in a RACI or power vs interest matrix.

Stakeholder: <small>Name & Role</small>				
Them  <small>Who are they? What's their world like?</small>	Needs  <small>What are their requirements?</small>	Context  <small>What is the nature of the work we will do together?</small>	Activities  <small>What interactions will we have?</small>	Me  <small>What perceptions do I have about this stakeholder?</small>
	Goals & Objectives  <small>What are their goals from this project?</small>		Outcome  <small>What is the expected outcome of this engagement?</small>	
Engagement Risks  <small>What potential problems could happen during this engagement?</small>			Engagement Practices  <small>What practices will I employ to mitigate engagement risks?</small>	



Kathy Berkidge: So it's got nine segments just like the other canvases do, starting with understanding them, what's their world? What are they? Who are they? Who are they in the world? And what are they thinking? What are their requirements from me, as well as the project? Not to be mistaken with their objectives. I want success to work in their eyes, we need to understand in the middle of the context of the work that we're doing together, what is the world around us like? Are we going to be doing interviews? What is the nature of the work we're doing? And again, what are those interactions we're planning to have? So beyond just a comms plan, what is the real nature of those interactions?

And then, of course, what is the outcome? So when we're working with them, what are their expectations of the outcome of our engagement? And what am I expecting as well, the last column on the right hand side is about me. Because when we think about our stakeholders, we always have some sort of, perhaps bias or judgement, or what we've heard before what we've seen before, perhaps there's history behind the engagement process. So we really kind of delve deeper within ourselves to say, what perceptions and ideas do I have about this stakeholder? Because the first sections are really about them. But now we start thinking about how I'm thinking, because perhaps, we did a project last year with them, and something happened, and I'm dreading being with them. That can really off put us, so if we can identify it we can all kind of work with it and bash it around a little bit and say, Hmm, how am I gonna work with this? So I'm not sabotaging my engagement with them and I'm able to get past it. This is where my mindfulness stuff comes in, I really need to sit and reflect on what am I really thinking about them. Am I coming in with an open slate, really open and aware to really listen to them? Or have I got all that history going on in my mind, which means I'm going to shut things down, which is terrible for stakeholder engagement.

The bottom level, on third canvas release talks about the risks, where do I see potential confusion or conflict? Because now that we've understood them, now that we've looked at what we're thinking, we ask what could go wrong, just like any risk, it's a potential problem. And then the last part is now that we've got all this information together, is to ask what am I going to do to ensure that stakeholder engagement works successfully for this stakeholder, and the way I am and the way that they are? So we can really do that analysis. And of course, it doesn't mean we shouldn't ignore the RACI, or the power interest grid or even the attitude scale that we might analyse using traditional stakeholder engagement tools. We can do this for one stakeholder. We could do it perhaps for a stakeholder group. And in fact, maybe it's a team trying to think about how a team's going to engage with a stakeholder. Perhaps we're a product team or perhaps we're engaging other stakeholders in the business. So it can be used one on one, many to many, one to many, one major one, all those different permutations.

Adrian Reed: That's really interesting. I look at this tool and see it as such a practical thinking tool. It gives us the questions to ask and as you say, it builds upon, it doesn't contradict other approaches, like the stakeholder onion, the stakeholder rainbow, and so on. So we have a question from Jason. Jason asks: "What's the best way in your opinion to analyse stakeholders' communication styles, use something like a user manual, or ask stakeholders directly, or learn as you go, or maybe something else?"



blackmetric

www.blackmetric.com

Kathy Berkidge: I really like the user manual concepts, I really enjoy that if we've got that workplace where people are writing their own user manuals and sharing it to their communities. That's fantastic. But it does take a bit, getting outside of our own head, and really being open to listening. So we need to talk to them and see if we can figure out how they are. We need to think about what their responsibilities are. How much time do they have to give, perhaps other cues might indicate whether they're more of a chatty kind of person, versus someone who just wants the executive summary, versus that person who really wants to be analytical about things and really wants to let things sit for a day and really think. So we need to, dare I say, do our research! I think it's really important to try to see without having perceptions, we need to go out and find out what is their comms style. You've got many of those tools, all of them which I appreciate, but you can't make them do a DISC analysis. So finding ways that you can pick up on... "hey, I think they're going to be more assertive", or maybe they're going to be more reflective. That means we're going to have to build a relationship with them, at least to start off with, to start forming an idea of their preferred communication style.

Adrian Reed: Fantastic advice. Kathy, what would be your biggest tip or takeaway for BAs that are thinking about different or additional ways of fostering stakeholder engagement.

Kathy Berkidge: For me, the number one that stands out, above all is being present. Absolutely being present. People say to me, often that I really feel heard, regardless of what they're saying, no matter how pressured they might be, or stressed about the current project or their own work, just to give them that space, and that time and that presence where they can articulate what's really going on for them beyond what you need of this requirement, you know, really being present. And of course, being present requires us to listen, and I mean, really listen, dropping our own thoughts and that inner voice and so for me being mindful about the way that we're listening, or perhaps not, honestly!,

Adrian Reed: Kathy, we're coming to the end of our 15 minutes slot so I am certain people will want to follow you, stay in touch with you, know more about what you do. How's the best way for people to connect with you find out more?

Kathy Berkidge: Well, the easiest way is of course on [LinkedIn](#). You can go to my website at mindatworkconsulting.com.au And there's all sorts of random pop ups that will happen all over the place between me and [Blackmetric](#), for example we'll be doing courses and seminars together. So just stay tuned to [Blackmetric](#) and of course, [LinkedIn](#). Feel free to send me a connection request and let me know what you're thinking.

Want more free content?

Stay connected by following us



LinkedIn:

<https://www.linkedin.com/company/blackmetric-business-solutions-ltd/>

Twitter:

<https://www.twitter.com/blackmetric>

Instagram:

<https://www.instagram.com/blackmetric.co.uk/>