

STAKEHOLDER IDENTIFICATION AND ANALYSIS

An Electronic Project Office (EPO) e-Book

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Stakeholder Identification and Analysis

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Stakeholder Identification and Analysis

1. Introduction

The EPO **Stakeholder Identification and Analysis** e-Book contains the following topics:

- Definition of project stakeholders and description of stakeholder categories,
- Identification of project stakeholders using the **Stakeholder Identification** sheet (in the **Project Communications Plan** Excel template),
- Analysis of project stakeholder support and influence using the **Stakeholder Analysis** Word template,
- Preparation of a project stakeholder communication strategy.

The **Stakeholder Identification and Analysis** e-Book expands on the framework provided in the PMBOK® and PMI® Program Management processes shown in Figure 1.

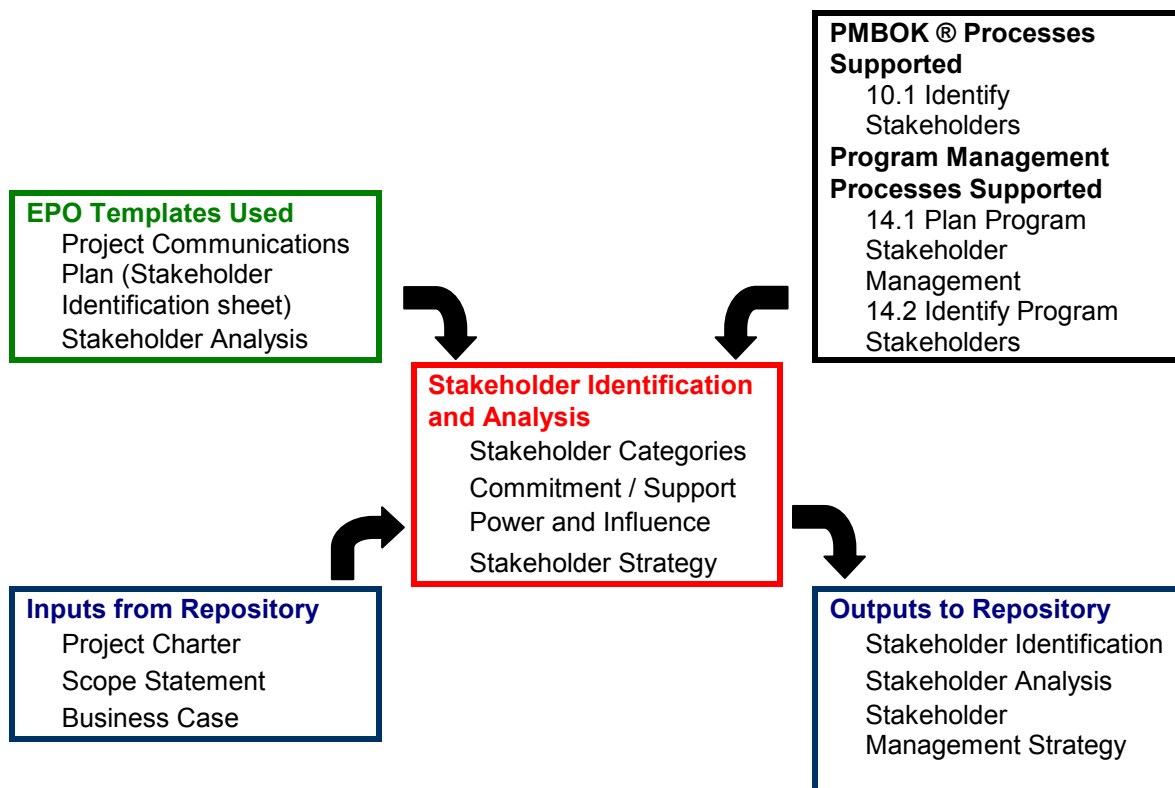


Figure 1 - Stakeholder Identification and Analysis Techniques & Templates

Stakeholder Identification and Analysis

2. Project Stakeholders

2.1 Stakeholder Definition

According to the PMI PMBOK ® (section 2.3), project stakeholders are:

“Individuals and organizations that are actively involved in the project, or whose interests may be positively or negatively affected as a result of project execution or project completion; they may also exert influence over the project and its results.”

Using the above definition project stakeholders include:

- Specific individuals, groups of people or organizations,
- Internal individuals or groups (within the organization) or external individuals or groups (outside the organization),
- Contributors to the project – they may provide products or services that contribute to project objectives,
- Recipients of products or services provided by the project,
- Individuals or groups that are interested in, or can influence the outcome of the project.

2.2 Stakeholder Categories

Project stakeholders fall into one of eight categories:

2.2.1 Output Delivery Stakeholders

Output delivery stakeholders are individuals, groups, or organizations responsible for the delivery of the project's outputs. This includes project team members and, in some cases, contractors.

Project Team - The project team is closest to the action and will provide much of the information that goes into project reports. They also have a need to know project progress and status. Project teams have unique communications requirements – for more on project team communication, refer to the EPO **Team Management** e-Book.

Contractors – Contractors (and subcontractors) may be project participants directly involved in the achievement of project objectives. They may be a member of the project team responsible for a specific deliverable or be accountable for the entire project or work package.

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2.2.2 Product Usage Stakeholders

Product usage stakeholders will directly or indirectly use the project products; they are ultimately responsible for the achievement of business objectives using the project deliverables. Product usage stakeholders include business users and customers of the organization.

Business Users - Business users are primarily concerned with the usability and quality of the project end deliverables. They are typically heavily involved in activities like requirement definition, package solution selection, application prototyping, software testing and application training. They may need more detailed reporting on these activities and less information on more technical tasks.

Customers – The organization's customers may use the project product directly (through websites) or indirectly (through interaction with the business user). Customers are rarely directly involved in the product development but they may need to be kept informed on project progress.

2.2.3 Product Support Stakeholders

Product support stakeholders are responsible for ensuring that the project product is available for use by the product usage group. Support stakeholders include application and technical support groups.

Application Support – Application support stakeholders provide operational support and enhancements to functionality over the life of the application. They often originate as members of the project team.

Support/Technical Groups – This stakeholder group includes the service (or help) desk, production operations, infrastructure (workstation, server, network, etc) support, and the data base administration group. They are primarily interested in the application scalability and stability as well as the deployment plans. Activities such as performance testing, data conversion and implementation are their main concern.

2.2.4 Funding Authority Stakeholders

Funding authority stakeholders are accountable for the outcome of the project and grant approval for release of funding and provision of resources. They are the corporate owners of the project and support the achievement of project objectives. Funding authority stakeholders include executives, project sponsors, business management, creditors and investors, and shareholders.

Stakeholder Identification and Analysis

Executive - The Executive need the answers to four questions at the outset of the project:

1. What business requirement does the project address?
2. What is the project justification (benefits, urgency)?
3. How much will the project cost?
4. How long will the project take?

Once approval for the project has been obtained, the Executive need to be kept informed if any of these answers change over the project. (For more on the project approval process, refer to the EPO **Project Prioritization and Approval** e-Book.)

Project Sponsor – The project sponsor is the individual who requests the project, provides the budget and funding, and ensures that project resources are available. The project sponsor ensures that other management stakeholders understand the strategic impact of the project. Project sponsors and project managers must form a close alliance to effectively manage project risks, issues and changes. (For more on Project Sponsors, refer to the EPO **Stakeholder Management** e-Book.)

Business Management - Business management has a stake in the project cost and schedule and will want reports on expenditures and progress towards schedule milestones. In addition, business management participates in risk management, resource allocation, issue escalation and change approval. Business management stakeholders, together with the project sponsor, may form a Project Steering Committee. (For more information on using a Project Steering Committee to help manage the project, refer to the EPO **Stakeholder Management** e-Book.)

Creditors and Investors – Creditors and investors provide the project funding and are interested in the return on their investment. On large projects, currency fluctuations and interest rate changes may also be a concern. Creditors and investors are interested in the status of target dates and project expenditures.

Shareholders – Shareholders are external stakeholders and include corporate stockholders and the Board of Directors. They are interested in the project Return on Investment (ROI) and the same four questions as the executives (see above).

2.2.5 Contributor Stakeholders

Contributor stakeholders are individuals or groups who provide inputs and services to the project. Contributors include service groups, suppliers and, in some cases, contractors. The main difference between contributors and output delivery stakeholders is commitment level. Output delivery stakeholders are committed to the success of the project. Contributors are involved in the project; their main concern is meeting their specific product or service obligation.

Stakeholder Identification and Analysis

Service Groups – These may include Legal, Procurement, Human Resources, Finance, and Training. Service groups supply resources and specialized services to the project and will need to know target dates and service requirements.

Suppliers and Contractors – Suppliers and contractors provide products (hardware, software, and infrastructure) or specialized services (training, product installation, or technical expertise) to the project. They are primarily interested in meeting their contractual obligations. Reporting requirements for contractors will change from the pre- to post-award stages of procurement. (For more on managing contractors, refer to the EPO **Procurement Planning** and **Contract Administration** e-Books.)

2.2.6 Review/Audit Stakeholders

Review/audit stakeholders are groups or organizations who need to review or audit the project and its deliverables to ensure that proper processes are followed and the quality of deliverables meets appropriate standards. Review/audit stakeholders include Architecture (or Technical) Review groups, Project Management Office (PMO), Quality Review groups, Internal or external auditors, consumer groups, regulatory agencies, and environmental agencies. Review/audit stakeholders often have the authority to stop a project until their concern is addressed. Review/audit stakeholders may also perform independent project reviews (as outlined in the EPO **Independent Project Reviews** e-Book).

Architecture (or Technical) Review groups – Architecture or technical review groups are concerned with the consistency, reliability and scalability of the technology being used to produce project deliverables. Deviations from a standard set of technical or architecture constraints may have to be justified to this group of stakeholders.

Project Management Office (PMO) – The PMO will often provide project management guidelines and templates to projects. They may also be responsible for project audits and post project reviews. (For more on the role of a PMO, refer to the EPO **Project Management Office** e-Book.)

Quality Review groups – Quality review groups will perform quality audits of project processes or deliverables with the intent of improving the effectiveness and efficiency of the project team. These stakeholders are interested in the project status and progress of deliverables to be audited.

Auditors – Internal or external auditors will be concerned with the project expenditures and the awarding of contracts. Internal auditors may be involved in the procurement process and may be members of the Project Steering Committee.

Stakeholder Identification and Analysis

Consumer Groups – consumer (or special interest) groups may be related to:

- The product or service delivered by the project,
- The process to be followed on the project,
- The membership of the project team.

Consumer and special interest groups must be kept informed of project progress and decisions that are related to their special interest.

Regulatory Agencies – Regulatory agencies are usually government agencies that will clarify regulations and ensure that the project stays within the applicable regulations and bylaws. Regulatory agencies can often make or break a project and may require significant lead times for requests.

Environmental Agencies – Environmental agencies monitor the impact of the project on the environment and provide clearances based on environmental impact assessments. Like regulatory agencies, environmental agencies can make or break a project and may require sufficient lead times in the project schedule.

2.2.7 Outcome Affected Stakeholders

Stakeholders affected by the outcome of the project include the public/press/media, unions or bargaining units, and competitors of the organization.

Public/Press/Media – The public, press and media may be recipients of long-term benefits of the project. High profile projects may require public relations activities to manage the expectations of the general public or the press/media.

Unions/Bargaining Units – Unions or bargaining units may represent employees on the project team, business departments who will use the project products, or suppliers of products or services. Unions or bargaining units will negotiate new bargaining agreements with management on behalf of their membership. These bargaining agreements may provide parameters for project work including hours of work, overtime rates, or even resource selection.

Competitors – Competitors of the organization performing the project and/or receiving the project products will be interested in the outcome of the project and how it affects competition. This may necessitate non-disclosure agreements and secure handling of project information.

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2.2.8 Related Project Stakeholders

Related projects (both internal and external) may impact the project team's ability to meet their objectives.

Other Project Managers and Teams – Other project teams may provide inputs to or receive outputs from the project. These inter-project dependencies will require communication. (For more on cross-project dependencies, refer to the EPO **Program Management** e-Book.)

Project Programs – A Program is defined by PMI (in the OPM3 Standard) as:

“A group of related projects managed in a coordinated way to obtain benefits and control not available from managing them individually”

Projects are grouped into programs because they share a common theme such as a strategic goal or corporate initiative. Program management is the coordinated management of the program to achieve strategic objectives and benefits. Projects that are part of a program may require coordinated status reporting. (For more on programs, refer to the EPO **Program Management** and **Program Governance** e-Books.)

Project Portfolios – A Portfolio is defined by the PMI OPM3 Standard as:

“A collection of projects and/or programs and other work grouped together to facilitate effective management of that work to meet strategic business objectives.”

Stated simplistically, project management is 'doing projects right' while portfolio management is 'doing the right projects'. Projects that are part of a portfolio may have the need for consolidated status reporting. (For more on project portfolios, refer to the EPO **Portfolio Management** e-Book.)

Stakeholder Identification and Analysis

The relationship between Project, Program and Portfolio Management is shown in figure 2.

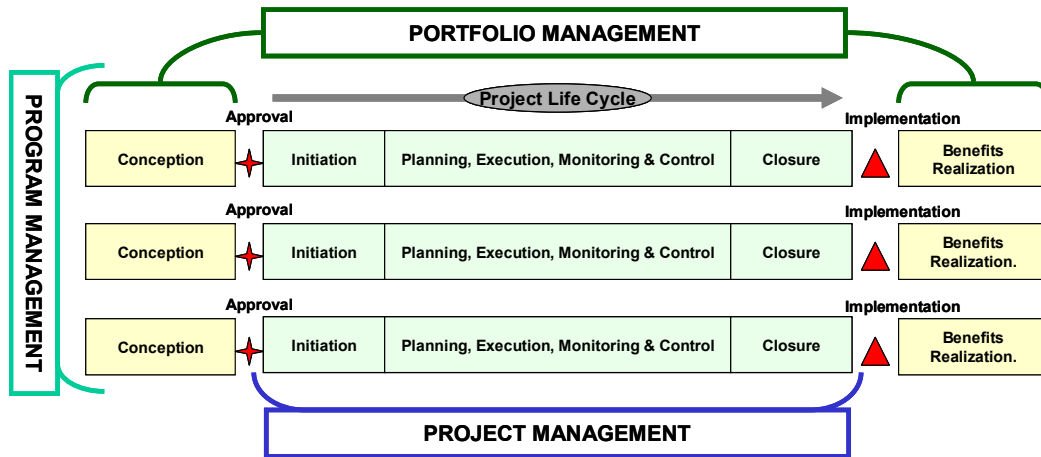


Figure 2 - Project, Program, and Portfolio Management

2.3 Stakeholder Identification

Stakeholder identification is the first step (as shown in figure 3) in planning communications with project stakeholders.

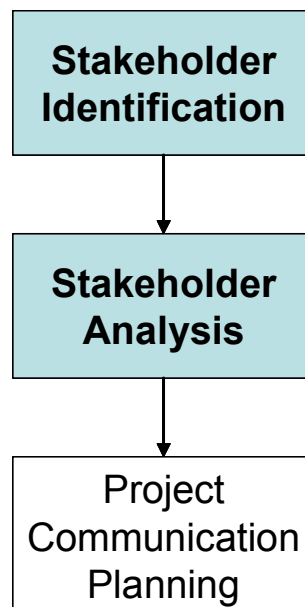


Figure 3 - Stakeholder Communications Planning Steps

Stakeholder Identification and Analysis

Project stakeholders can often be identified during the preparation of other project planning deliverables. Potential stakeholder categories identified in project planning documents are shown in table 1.

Project Planning Document	Stakeholder Category							
	Output Delivery	Product Usage	Product Support	Funding Authority	Contributor	Review/Audit	Outcome Affected	Related Project
Potential Project Identification		X		X			X	
Project Priority List				X				X
Project Business Case		X	X	X			X	
Project Charter	X	X	X	X			X	
Scope Statement	X	X	X		X			X
Risk Management Plan	X	X	X	X	X	X	X	X
Quality Management Plan	X	X	X		X	X		
Project Human Resource Plan	X	X	X		X	X		X
Procurement Plan	X		X	X	X			

Table 1 - Stakeholder Identification Sources

Using the **Stakeholder Identification** sheet (in the **Project Communications Plan** Excel template (summarized in table 2), identify all the project stakeholders (internal and external, individuals, groups or organizations).

Stakeholder Category	Stakeholder Name	Project Stake	Commitment Required	Internal/External	Further Analysis	Preferred Medium	Technology Access	Special Information Needs

Table 2 - Stakeholder Identification sheet

Stakeholder Category – Using the drop-down, select the appropriate stakeholder category.

Stakeholder Name – Enter the name of the individual, group or organization. (If the stakeholder is a group or organization, provide a contact name if known).

Project Stake - For each stakeholder, identify their stake in the project using the drop-down. This will take one of three forms:

1. Providing a product or service that contributes to the project objectives.
2. Receiving or using a product or service delivered by the project.
3. Having an interest in the execution or outcome of the project.

Stakeholder Identification and Analysis

Commitment Required - Determine the required stakeholder commitment to the project based on the drop-down list and descriptions provided in table 3.

Level	Commitment required
Action Required	Stakeholders should have the highest level of commitment to the project and action is required on their part for the project to achieve its objectives.
Belief or Buy-in	Stakeholders must fully commit to the project and their participation is required for the project to be successful.
Understanding	Stakeholders require an understanding of the project and need a positive perception of changes brought about by the project.
Awareness	Stakeholders should be aware of the project, but their commitment or adoption of the changes is not required.
No commitment	Stakeholders do not require any level of awareness of, or commitment to the project.

Table 3 - Stakeholder Commitment Required

Internal/External Stakeholder – Indicate using the drop-down whether the stakeholder is internal to the organization or external. (This may impact choice of communications medium.)

Further Analysis Required? – Indicate (yes/no) if further analysis of stakeholder commitment is required (Yes means that a stakeholder analysis as described in section 3 will be completed.)

Preferred Communication Medium - Indicate any communication medium preferences that the stakeholder may have. Some stakeholders may prefer written correspondence to electronic messages. Others may want messages delivered verbally, followed up with written communication.

Reporting Frequency – Identify how often communications with the stakeholder should occur.

Technology Access Constraints - Indicate any constraints that may inhibit communications. For example, using a project website to communicate will not be very effective for a stakeholder without intranet or Internet access. Other stakeholders may have an assistant screen their correspondence; these 'gatekeepers' can decide which messages get through.

Special Information Needs - Describe any special information needs of the stakeholder. For example, lead-time may be required for service or audit stakeholders. Other stakeholders may have their own standard forms of communication that must be adhered to.

3. Stakeholder Analysis

For the majority of project stakeholders, the information contained on the **Stakeholder Identification** sheet is sufficient to prepare a project communications plan. However, some stakeholders will require a more in-depth analysis. For example:

- Funding Authority stakeholders have the power to constrain project resources or cancel the project altogether,
- Review/Audit stakeholders can delay the project until their needs are met,
- Product Usage (and some Outcome Affected) stakeholders can resist change and cause schedule delays,
- Output Delivery and Contributor stakeholders need to meet delivery dates and quality commitments.

For these stakeholders, a Stakeholder Analysis process adapted from *Project Management – Strategic Design and Implementation* (David Cleland) is shown in Figure 4.

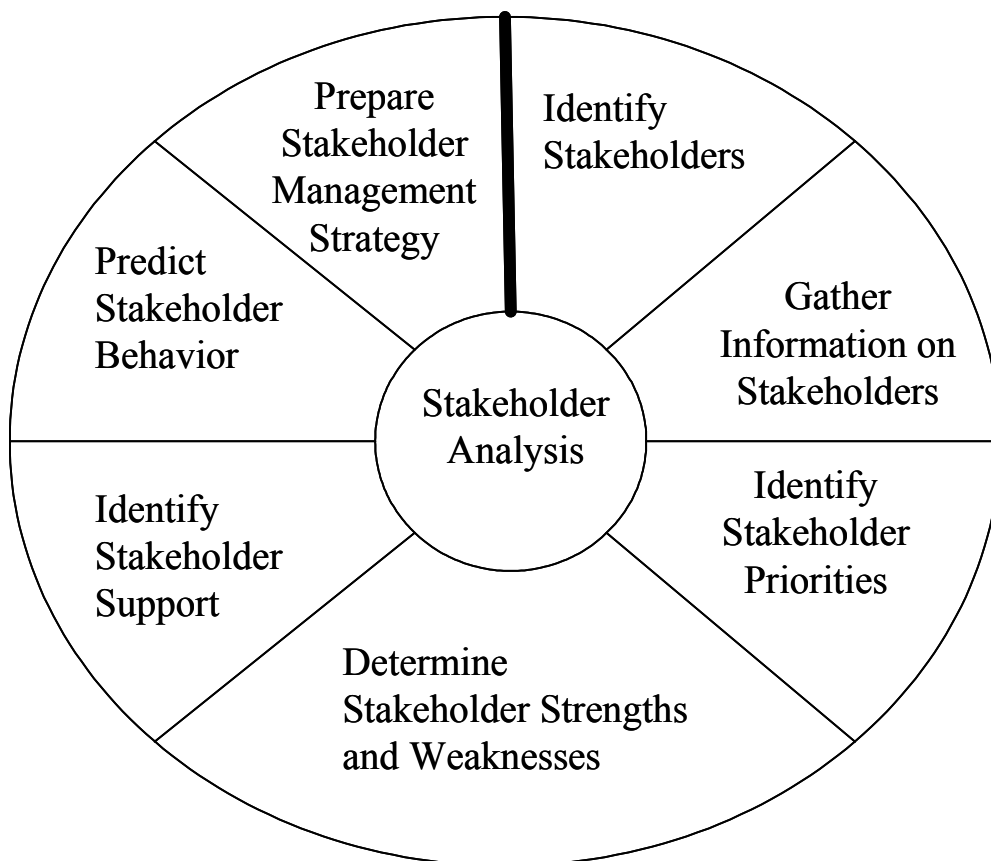


Figure 4 - Stakeholder Analysis Process

Stakeholder Identification and Analysis

Beginning at the 12 o'clock position in figure 4, the first two steps (Identify Stakeholders and Gather Information) are performed using the **Stakeholder Identification** sheet (in the **Project Communications Plan** Excel template). The **Stakeholder Analysis** Word template is used to complete the cycle.

3.1 Stakeholders Priorities

Schedule, Cost and Product Quality - Determine what each stakeholder's schedule, cost and product quality priorities are. This will vary depending on the project stakeholders. For example, the executive may have a high cost focus, the business management stake may be focused on schedule, the business user may be primarily concerned with product quality, and the project sponsor may place a high priority on both cost and schedule. For each stakeholder, identify which dimension is:

- Inflexible – is most critical and must be constrained throughout the project,
- Adaptable – is negotiable but should be optimized,
- Acceptable – concessions can be made as part of a trade-off to meet constraints of the inflexible dimension or to optimize the adaptable dimension.

The priorities of the Funding Authority stakeholders MUST align with the scope management priorities matrix contained in the project Scope Management Plan. (For more information on the scope management priorities matrix refer to the EPO **Scope Management Planning** e-Book.)

For each dimension provide an assessment of the stakeholder priority including the likelihood that priorities may change during the project.

Interests in Project - Identify the specific project interests of the stakeholder. These relate back to the stakeholders' stake or role in the project and may impact their contribution to the project or their behavior when receiving project products.

Stakeholder Expectations - Priorities of other stakeholders, such as product usage or review/audit, may conflict with the project priorities. In this case, their expectations must be managed during project communications.

Success Criteria - Describe the project success criteria (from the perspective of the stakeholder). This may or may not align with project objectives.

Stakeholder Objectives - Identify the stakeholder's objectives related to the project. Examples include:

- Improved productivity,
- Increased customer service,

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- Reduced costs.

Indicate the priority of each objective and how each will be measured.

3.2 Stakeholder SWOT

SWOT stands for Strengths, Weaknesses, Opportunities and Threats. SWOT analysis is a useful tool for strategic planning and risk assessment and can also be applied to Stakeholder Analysis. For each stakeholder, determine their:

- Strengths – What does the stakeholder excel at? How can this strength help achieve project objectives?
- Weaknesses – What are the liabilities of the stakeholder? What does the stakeholder do poorly? Will these weaknesses hurt or help in achieving project objectives?
- Opportunities – What favorable circumstances or situations does this stakeholder present? Will an alliance with this stakeholder help achieve project objectives?
- Threats – What potential challenges are presented by this stakeholder? Should this stakeholder be treated as hostile? How can the stakeholder threats be minimized?

Record the Stakeholder SWOT (shown in table 4) on the **Stakeholder Analysis** template.

Strengths	Weaknesses
Opportunities	Threats

Table 4 - Stakeholder SWOT Analysis

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3.3 Stakeholder Support

Stakeholder support consists of two dimensions: agreement and trust. Based on the level of support across these two dimensions, stakeholders fall into one of six groups as shown in figure 5:

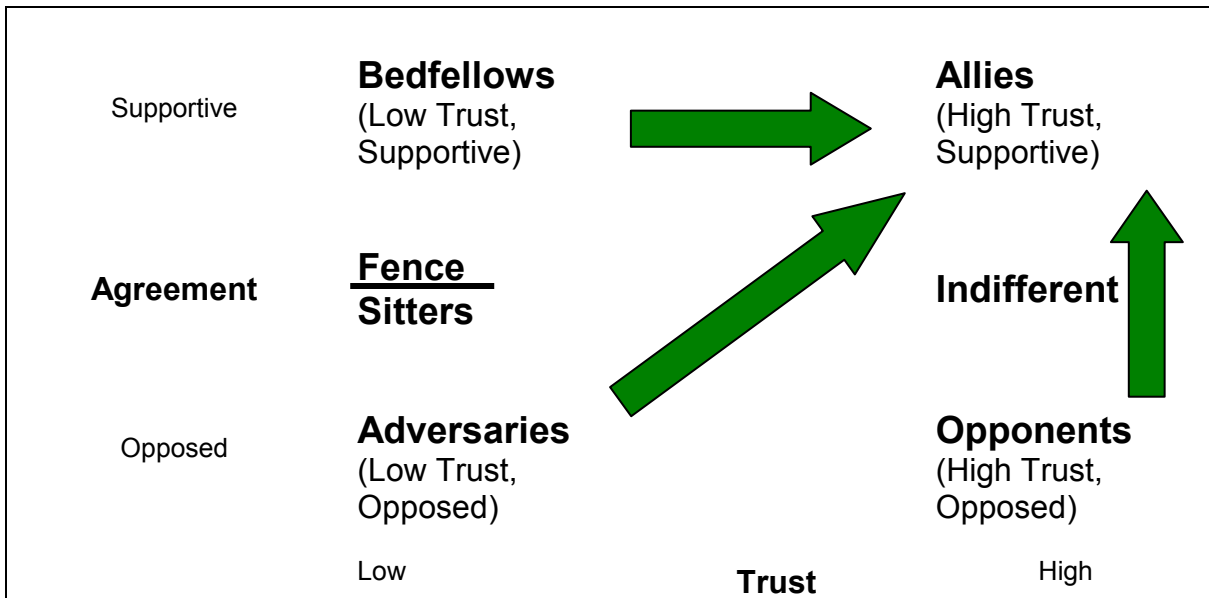


Figure 5 - Stakeholder Support

1. Allies are supportive and have proven trust. They can be counted on to champion the project and contribute to its success. The relationship with project allies should be nurtured; they should be kept involved and informed throughout the project.
2. Indifferent stakeholders can be trusted, but are neither supportive nor opposed.
3. Opponents have low support for the project, but can be trusted to be honest and forthright in their views. They will challenge the project approach or deliverable quality and can offer constructive improvements. Opponents should not be ignored; a problem solving approach to conflict resolution can turn an opponent into an ally.
4. Adversaries are different from opponents. While both groups are opposed to the project, opponents can be trusted; adversaries cannot. Their opposition and distrust can be harmful to the project. The role of the adversary on the project should be evaluated; avoid counting on an

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adversary if possible. Dealing with adversaries involves a degree of risk – mitigation plans may be required.

5. Bedfellows support the project, but cannot be trusted. They have a reputation for changing allegiance to serve their own interests. Agreements with bedfellows should be documented; they may need to be held accountable.
6. Fence sitters are political and will wait to determine their level of support. Depending on political climate, they become adversaries or bedfellows. Either way they cannot be trusted.

An effective stakeholder management strategy will build trust and support for the project. As shown on figure 5:

- Opponents can become allies through effective conflict management and seeking a common solution. (For more on conflict management, refer to the EPO **Team Management** e-Book.)
- Adversaries can become allies through principled negotiation that focuses on the issues, not the people. (For more on principled negotiation, refer to the EPO **Stakeholder Management** e-Book.)
- Bedfellows can become allies through exchange of influence to create an environment of trust. (For more on influence exchange, refer to the EPO **Stakeholder Management** e-Book.)

On the **Stakeholder Analysis** template stakeholder support section (shown in table 5), select the appropriate check-box (one only) to indicate the stakeholder agreement for the project and the level of trust.

Supportive	Bedfellow <input type="checkbox"/>	Ally <input type="checkbox"/>
Agreement	Fence Sitter <input type="checkbox"/>	Indifferent <input type="checkbox"/>
Opposed	Adversary <input type="checkbox"/>	Opponent <input type="checkbox"/>
	Low	High
	Trust	

Table 5 - Stakeholder Support

In the comments section, provide further description of the stakeholder support and relate this back to the required commitment level shown on the **Stakeholder Identification** sheet.

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3.4 Stakeholder Power and Influence

Stakeholder influence is their ability to make or influence decisions related to the project. Influence is categorized according to table 6.

Influence Category	Influence on project
Decision Maker	Have the formal authority to directly affect the project's ability to achieve objectives.
Gatekeeper	Able to route, delay or block project communications.
Opinion Leader	Significant informal influence that will indirectly affect the project's ability to achieve objectives.
Minimal	Has no formal or informal influence on the project

Table 6 - Stakeholder Influence

Determine the formal power of the project stakeholder as follows:

- High power means the person or group has the power of veto and can cancel or significantly change the project,
- Medium power indicates that the project could achieve its objectives against this stakeholder's opposition, but it would not be easy,
- Low indicates the stakeholder can do little to adversely affect the outcome of the project.

Complete the stakeholder support analysis by describing their ability to impact project objectives and any confidentiality concerns that must be considered when planning project communications.

3.5 Predicted Behavior

In the Stakeholder Forecast section, predict the future behavior of the stakeholder that may help or hurt the project. This may include an assessment of the stakeholder volatility or a prediction of their reaction to future events.

Indicate the stakeholder's potential impact on project objectives based on their future behavior. For example, the funding authority stakeholder may withhold project funding if the organization has poor financial results.

The predicted behavior of a stakeholder can be related to their stake in the project as follows:

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1. Providing a product or service – will these stakeholders maintain their commitment to the project and continue to meet delivery dates or service levels?
2. Receiving or using a product or service – will the need for the product or service change over the project? Will the stakeholder change the nature of the product wanted or try to modify cost or schedule?
3. Having an interest in the execution or outcome of the project – will this vested interest change over the life of the project? Does the stakeholder have the power or influence to impact the project's ability to achieve objectives?

3.6 Stakeholder Communication Strategy

Communications Strategy - The stakeholder communication strategy should address the stakeholder commitment level. Compare the required commitment level (from the **Stakeholder Identification** sheet) with the current commitment level (based on the **Stakeholder Analysis**). Prepare a communications strategy to close the gap between current and required commitment and then maintain the required commitment. This may include methods of leveraging strong support from powerful stakeholders or means of mitigating the affect of stakeholders opposed to the project.

Communications Style - The communication style to be used depends on the need to control both the message content and the audience involvement as shown in Figure 6 (adapted from *Guide to Managerial Communication* by Mary Munter).

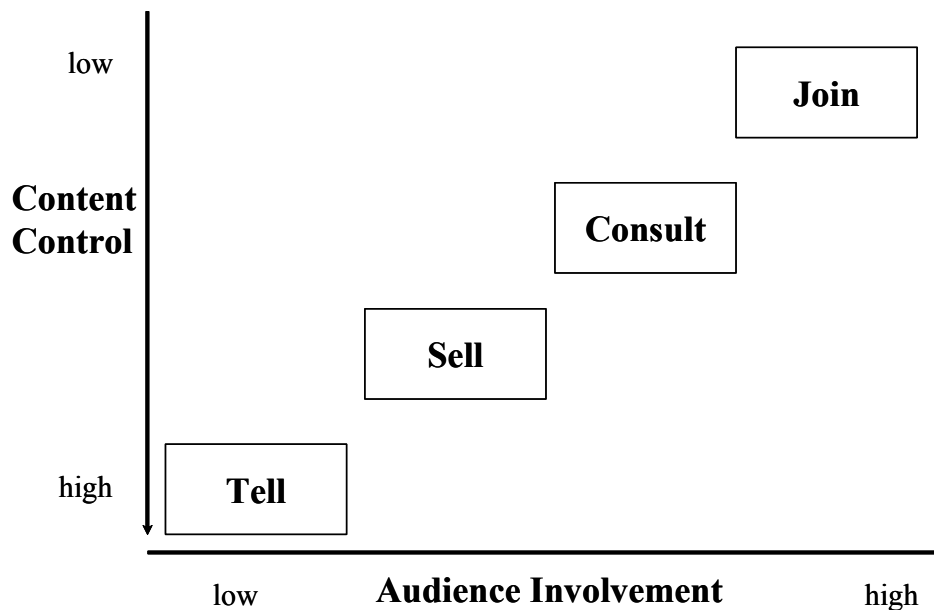


Figure 6 - Communication Styles

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The 'Tell' style is used when there is a need to control the content of the communication. In these cases the project manager has sufficient information and is instructing, informing or explaining. The Project Status Report is an example of a 'Tell' communication.

The 'Sell' style is appropriate when the project manager is persuading or advocating and needs some audience involvement. Project proposals and change request recommendations are examples of 'Sell' communications.

The 'Consult' style is used when the project manager needs input, but wants to control the interaction. This style is helpful when learning and managing stakeholder expectations. Examples of the 'Consult' style include requirements workshops or scope definition meetings.

The 'Join' style is a collaborating style where stakeholder commitment is needed or sought. Issue resolution, conflict management, and risk identification are examples of the 'Join' style.

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4. Review

Project stakeholders are individuals and organizations that are actively involved in the project, or whose interests may be positively or negatively affected as a result of project execution or project completion; they may also exert influence over the project and its results.

Project stakeholders fall into one of eight categories as shown in table 7.

Stakeholder Category	Stakeholder Description
Output delivery	Individuals, groups, or organizations responsible for the delivery of the project's outputs
Product usage	Directly or indirectly use the project products; ultimately responsible for the achievement of business objectives using the project deliverables
Product support	Responsible for ensuring that the project product is available for use
Funding authority	Accountable for the outcome of the project and grant approval for release of funding and provision of resources
Contributor	Individuals or groups who provide inputs and services to the project
Review/audit	Groups or organizations who need to review or audit the project and its deliverables to ensure that proper processes are followed and the quality of deliverables meets appropriate standards
Outcome affected	Public/press/media, unions or bargaining units, and competitors of the organization
Related projects	Other project teams may provide inputs to or receive outputs from the project

Table 7 - Stakeholder Categories

Stakeholder Identification and Analysis

As shown in figure 7, Stakeholder Communication Planning is a three-step process:

1. Identification of project stakeholders using the **Stakeholder Identification** sheet (in the **Project Communications Plan** Excel template),
2. Analysis of project stakeholder support and influence using the **Stakeholder Analysis** Word template,
3. Preparation of a project stakeholder communications management strategy as outlined in the EPO **Communications Planning** e-Book.

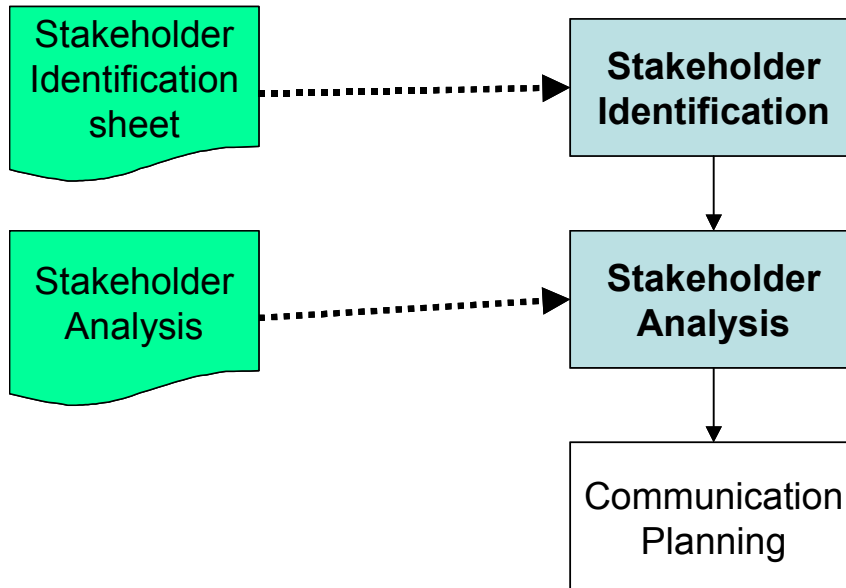


Figure 7 - Stakeholder Communications Planning Steps and Templates

Stakeholder Identification and Analysis

The relationship between **Stakeholder Identification and Analysis** and the complete set of EPO version 12.0 e-Books is shown in figure 8.

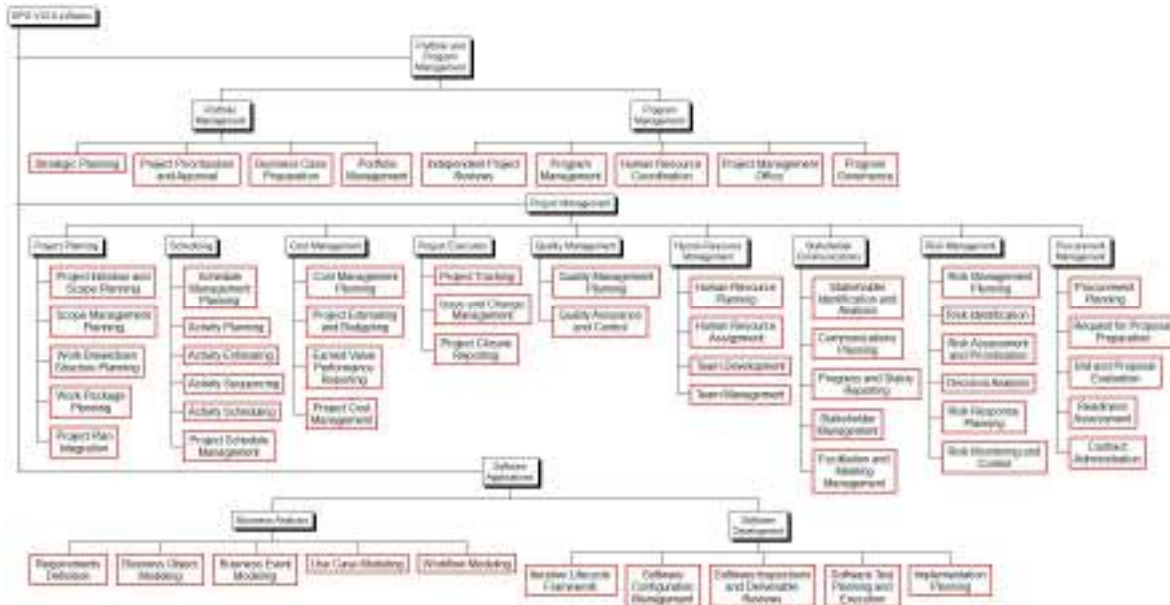


Figure 8 - Electronic Project Office Version 12.0 e-Books

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Stakeholder Identification and Analysis

5.1 Links

Project Management - Tasmanian State Government

http://www.projectmanagement.tas.gov.au/pm_templates/pm_templates1.htm

Stakeholder Identification:

<http://www.maxwideman.com/issacons4/iac1440/index.htm>

Stakeholder analysis:

<http://www.maxwideman.com/issacons4/iac1441/index.htm>