THE ULTIMATE

STAKEHOLDER MAPPING

PLAYBOOK

borealis

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What is Stakeholder Mapping?

Stakeholder mapping is a visualization of the relationship stakeholders have with an organization or project - and how this relationship evolves.

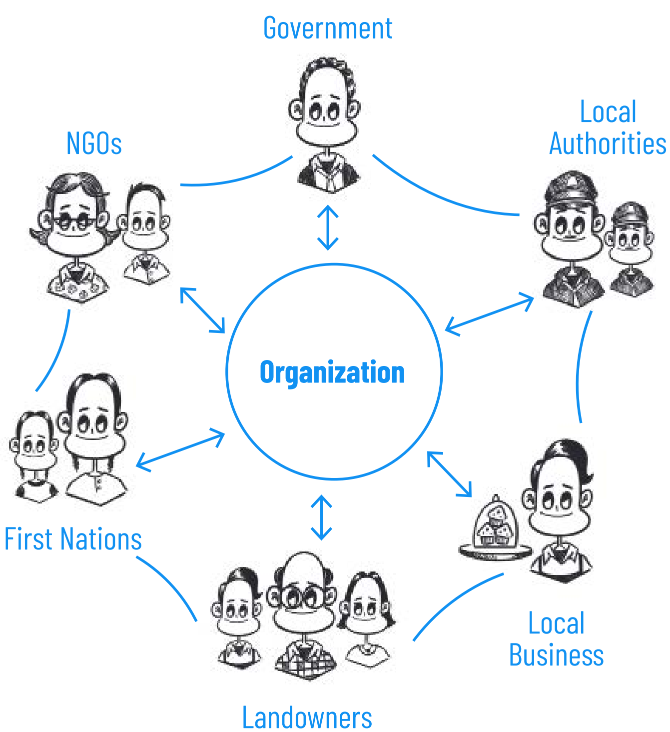
It can help you...

- Identify who has the most influence.
- Identify who benefits from your project.
- Identify where resources are within your organization.
- Create a game plan for success.

When you invest in stakeholder mapping, you'll be able to develop a sophisticated stakeholder engagement strategy and lead your project successfully over the finish line.

Step 1
Identifying your stakeholders

So, who are your stakeholders? These are any individuals, companies, or institutions who may impact your project OR be impacted by it (negatively or positively).



It's essential to identify every potential stakeholder, even if there are thousands of individuals.

You can use the following strategies to create a list of potential stakeholders:

- Brainstorming sessions
- Focus groups
- Consultations
- Research
- Consultants
- Historical data
- Grievances
- Issues logs

1.1 Guiding Questions

Ask yourself these questions to guide your strategies:

- Who will be affected?
- Who will support it?
- Who will oppose it?

Step 2
Classify your stakeholders

Now you'll categorize your list of stakeholders into groups. Here's how:

- Identify broad groups with similar interests and needs.
- Filter down your groups into subgroups.

You'll define groups relevant to your project based on industry, context, scope, history, location, etc.

Check out our example:

Government and regulatory authorities	Communities affected by the project	Companies and commercial organizations	Internal Stakeholders
• Governments • Local and national regulatory bodies • Elected representatives • Public advisory commitees • Police and emergency services	• Populations near your project • Job seekers • Vulnerable groups: women, elders, etc. • Religious groups • Universities and other educationl institutions	• Suppliers • Services providers • Partners	• Board of directors • Directors • Employees • Investors

2.1 Guiding Questions

Ask yourself these questions to guide your strategies:

- Which individuals have similar interests?
- Which individuals have similar needs?
- What do these individuals have in common?
- Can I filter these into closely related groups?

Step 3
Analyze Your Stakeholders

Once you've classified your stakeholders, you can analyze them. In this case, analysis involves assessing and prioritizing the stakeholders your project will impact.

This will help you understand:

- Why you should engage.
- How you should engage.
- How often you should engage.
- The risks and opportunities they present to your project.

A stakeholder assessment will help you determine which types of communication and messaging will be most successful.

3.1 Consider Stakeholder Motivations

To start your analysis, consider how your stakeholders' motivations could affect your project. Here's a list of potential motivations:

Motivation	How does it affect your project?
Financial interests	Will they make or lose money because of this project?
Moral and ethical values	Do they believe the project deserves social acceptance?
Rights	What legal rights are affecting their opinion?
Religious beliefs	What religious beliefs do they hold that could affect the project?
Political opinions	Can political opinions trigger support or opposition to the project?
Business interests	Do they expect the project to increase or decrease business revenue?
Knowledge	How much do they know about your project?
Demographics	Can their age, income, and access to employment opportunities affect your project?
Environmental stewardship	Is the project's environmental footprint attracting them or driving them away?
Value of ownership	Do they stand to gain or lose something of value, such as their farm or quiet neighbourhood?
Communication preferences	Are you communicating with them in a way that's meaningful to them?

3.2 Mapping Your Stakeholders

Stakeholder mapping helps you assess stakeholders based on different parameters. Your analysis will help you evaluate the potential impact of any stakeholder based on:

- Their interest in the project.
- How the project will affect them.
- The amount of influence they have.

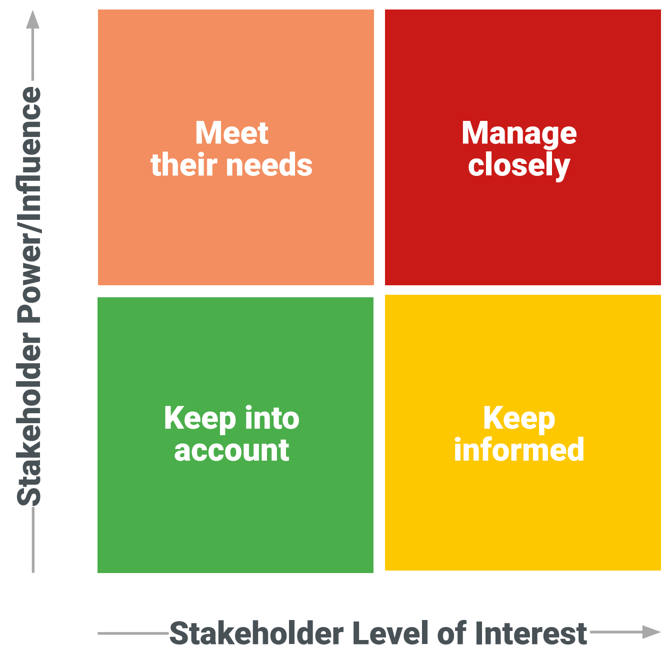
There are many models used for analyzing stakeholders. You may want to use a combination of approaches. Let's look at some common models.

3.3 Mapping Approach: Power/Interest Grid

The Power/Interest Grid compares stakeholders based on their authority and involvement in the project.

How it works

This matrix shows a stakeholder's level of influence on one axis and how much your organization impacts (or is impacted by) these stakeholders on the other axis.

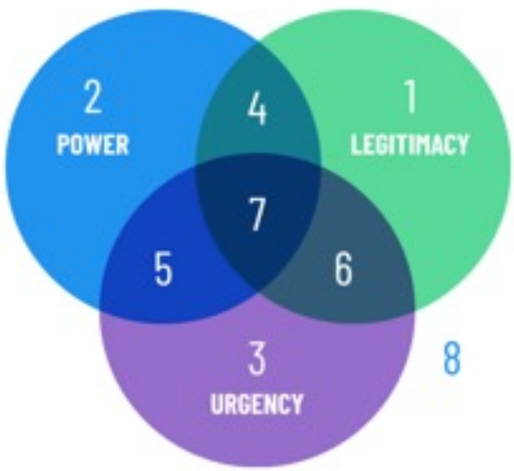


3.4 Mapping Approach: The Salience Model

The Salience Model compares stakeholders based on their power, legitimacy and urgency.

How it works

This model asks you to map each stakeholder to one of seven categories in a Venn diagram. Those who fit into more than one category require the most attention.

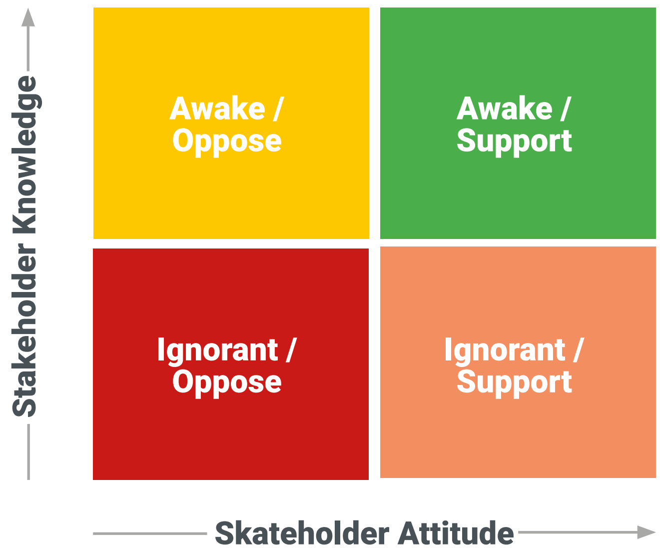


3.5 Mapping Approach: Stakeholder Knowledge Base

The Stakeholder Knowledge Base evaluates stakeholders' levels of awareness and support.

How it works

This model identifies those who are uninformed (or misinformed) and seeks ways to manage risks with those who do understand the project but still oppose it.



3.6 Additional Stakeholder Mapping Approaches

Mapping technique	How it works	Benefits
By Issues	This approach maps stakeholders by the issues impacting your project. You'll identify issues then tag your stakeholders to these groups.	• Easily tailor your communication to address the issues most important to them. • See how often an issue was discussed based on your meetings with certain stakeholders.
Interest-Influence	Map your stakeholders in 4 categories: • High interest and influence • Low interest and influence • High interest and low influence • Low interest and high influence	• A simple way to determine which stakeholders you should prioritize for engagement.
Tiered System	Rank each stakeholder from 1 to 3, with 1 being your most engaged and 3 being your least engaged. You can set strict criteria like how many engagement activities they attend to move tiers upward or downward.	See how your strategies affect engagement for certain groups over time

3.7 Prioritize Your Stakeholders

After mapping your stakeholders, it's time to prioritize them. This will help you create an engagement strategy that fits each group. Factors that may influence how you prioritize your stakeholders include:

- Nature of your project
- Available resources
- Project timeline

A simple way to prioritize stakeholders is to use the following grouping strategy:

Stakeholder type	Description	Examples
Primary stakeholders	People most affected by your project.	• Individuals who will need to be relocated • People employed by the project
Secondary stakeholders	People indirectly affected by your project.	• Customers • Minority shareholders • Members of an advocacy group
Key stakeholders	People vital to the success of your project.	• Individuals with powerful decision-making abilities • Government officials

PRO TIP

Stakeholders' interests, expectations, and perceptions are dynamic. Monitor changes to their positions or priority ranking over time and adjust your strategies accordingly.

Step 4
Engage Your Stakeholders

Once you know who your stakeholders are and how to prioritize them, you'll create your engagement strategy.

The first step is identifying your objectives.

Here's a handy framework:

Set S.M.A.R.T goals

S - Specific	The goals for engaging your stakeholders should be specific, with no room for misinterpretation. ***For example:*** Let's use print materials to communicate with our secondary stakeholders.
M - Measurable	The goals should be quantifiable and trackable. ***For example***: Let's close out each primary stakeholder grievance within five business days.
A - Achievable	Rank each stakeholder from 1 to 3, with 1 being your most engaged and 3 being your least engaged. You can set strict criteria like how many engagement activities they attend to move them up or down a tier.
R - Relevant	The goals should fit into the big-picture, overarching goals. ***For example:*** Let's avoid significant project delays by factoring in extra time into our timelines.
T - Time-Bound	The goals should have timelines attached. ***For example:*** Let's communicate with our key stakeholders each week until the project deadline.

4.1 Build Your Engagement Plan Activities & Matrix

You can use many methodologies to build an engagement plan for your stakeholders.

You can use the stakeholder maps you created earlier to inform how you want to engage with different groups of stakeholders.

Here's a high-level framework to guide you as you build your matrix.

WHO	• Who on your team is responsible for communicating with each stakeholder group? • Who is your audience for each engagement strategy?
WHAT	• What topics need to be discussed, and with what sentiment? (negative, neutral, positive) • What communication methods will you use? • What tools will you use to implement your strategy?
WHEN	• Establish a clear time frame for your communications
WHY	• Why are you addressing this subject with this group? (prevention, reaction, general announcement)
HOW	• How will you communicate with each stakeholder group? • How can stakeholders respond/react?

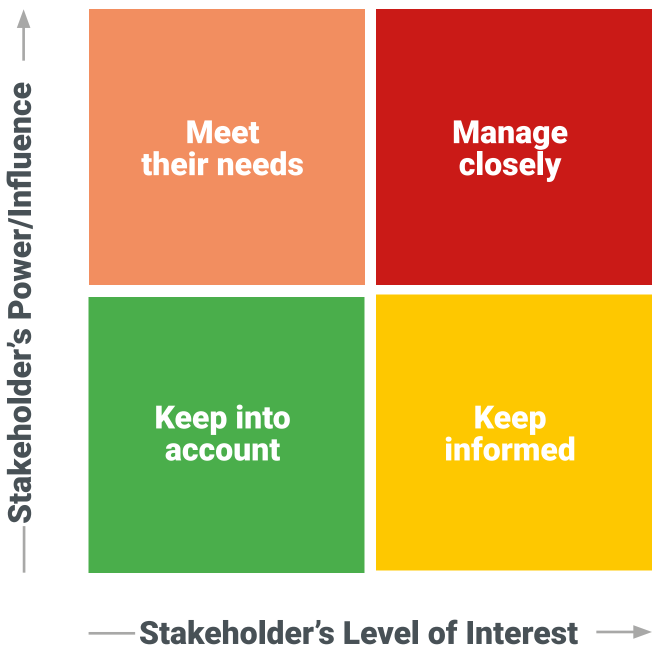
4.2 Stakeholder Engagement Plan Matrix

When you begin mapping your engagement strategy, you can use a matrix.

Here's an example of a stakeholder engagement matrix.

STAKEHOLDER		AREAS OF INFLUENCE / INTEREST	PROJECT PHASE	STAKEHOLDER MANAGER	ENGAGEMENT APPROACH	ENGAGEMENT TOOLS	FREQUENCY
Ministry of Environment		Regulatory compliance Environmental monitoring	All	Government Relations	Consult	Face-to-face Email	Very Frequent
Ministry of Infrastructure		Disruption of existing infrastructure Development of new infrastructure	Construction	Government Relations	Consult	Face-to-face Email	Frequent
Traditional chiefs		Impact on traditional habits and customs Local impact and opportunities	All	Community Relations Manager	Consult	Face-to-face Information boards	Less Frequent
NGOs		Socio-economic and environmental monitoring	All	Community Relations Manager	Consult	Face-to-face Information boards	Occasional

The following stakeholder maps were used to create the matrix in the previous page.



Governement Authorities

- Local authorities
- Goverments
- Ministries
- Public advisory bodies

Civil Society & Development Agencies

- Development Agencies
- Non-government organizations (NGOs)
- Religious authorities
- Academic and research centers

Affected Communities

- Residents of areas affected by the project
- Representatives of affected people
- Job seekers

Commercial Organizations

- Local business
- Local providers (services and products)
- Associations
- Unions

4.3 Create Your Engagement Timeline

Next, you'll need to create a timeline for your engagement activities and the tasks you'll need to complete in preparation for these activities.

This will often depend on the following:

- Type of Engagement Activity (ex. Consult, Public Forum, Email)
- Frequency of Engagement Activity

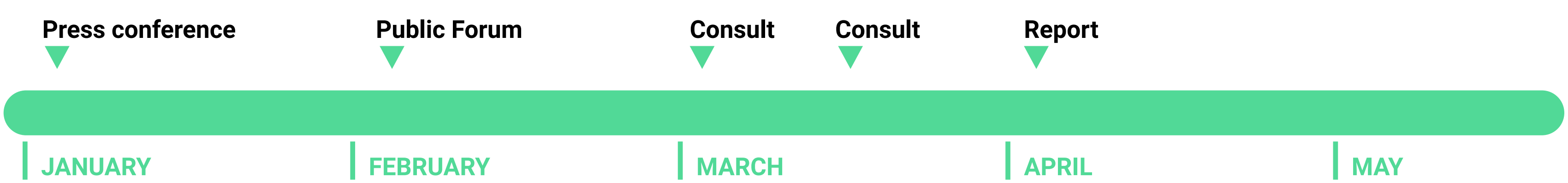
PRO TIP

Some project phases will require more engagement activities than others. Give yourself some buffer room.

Here are examples of dates that could impact your timeline depending on your project:

- Reporting milestones
- Elections
- Financial institution requirements

Use this information to mark approximate dates and firm dates on the calendar, for project management purposes.



4.4 Monitoring and Reporting

To ensure you're implementing your plan, you'll need to monitor and report on your engagement activities.

Monitoring
is collecting information while tracking the progress of your engagement strategy.

Reporting
is documenting and using visualizations to indicate how your strategy is progressing.

How to monitor and report

- Identify critical aspects of the strategy to monitor & report.
- Consider the expectations and needs of individuals leveraging reports.
- Choose appropriate and accessible visualizations.

What tools to use

Here are some essential tools you can use for monitoring and reporting:

- Excel spreadsheets
- Emails
- Shared documents
- Specialized software

4.5 Guiding Questions

Ask yourself these questions to guide your strategies:

- What activities should I monitor and report on?
- What is the best visualization to communicate this information?
- Which visualizations will be readily understood?
- Did we respect our timeframe?
- Have all communications been carried out?
- What was the response from the various stakeholder groups?
- Did we respect and follow up on our engagements?
- Has anything changed in the stakeholder landscape?

4.6 Build Your Communication Management Process

Stakeholder questions, feedback, comments, and grievances may arise as you move forward with your project.

You'll need to create a communication management process to allow your stakeholders to share their perspectives and build trust. You can customize your process however you want.

Here are some best practices:

- Make the process understandable and accessible.
- Allow individuals to feel safe when they share.
- Include a deadline for each step of the resolution or response process.
- The decision-making criteria and procedure should be the same for all types of complaints and all complainants.
- Respond to complainants promptly.
- Include an appeal mechanism for complainants who are dissatisfied with the outcome of the investigation.
- Keep good records of these communications.

4.7 Identify Resources and Responsibilities

Now it's time to identify each team member's role and responsibilities.

- Identify the internal and external resources available to you.
- Review each member's titles, skill sets and knowledge base.
- Match members of your team with stakeholder groups.
- Set expectations for how often they'll communicate.
- Identify which tasks each member is responsible for.

While identifying your resources, you may realize you have skill set gaps or capacity issues. In this case, you may need to hire additional team members.

PRO TIP

If you're low on internal resources, have your team focus on communicating with key stakeholders since they'll influence the project the most.

Step 5

Tracking the Evolution of Your Stakeholder Mapping

Finally, you can help ensure the effectiveness of your strategy and reduce wasted resources by tracking how your mapping evolves. Your mapping will need to be updated based on changes to any of the following:

- Stakeholder positions
- Stakeholder interests
- Stakeholder relevancy

When you track the evolution, you'll see how these changes impact your strategy.

It's essential to update your stakeholder mapping often to get the most value from your strategy.

"A stakeholder map is, by definition, a picture of a specific moment in time. If you leave it like that, it's worthless."

- Jose Zepeda, Strategic Consultant, Borealis

5.1 Take Your Stakeholder Mapping to the Next Level

Congratulations!

You're even closer to building your stakeholder mapping and engagement strategy. But developing and maintaining these can be challenging.

Ready for an easy-to-use, sophisticated stakeholder mapping technology?

Borealis software includes tools and templates to simplify the process and helps you build more insightful stakeholder maps.

Key features of stakeholder mapping

Assess stakeholder position	Track evolution over time	Engage Strategically
Allows you to assess stakeholders using up to 8 axes: • Position • Impact • Importance • Influence • Reach • Legitimacy • Priority • Interest	Monitor changes to a stakeholder's level of interest and influence throughout a project.	Use stakeholder mapping to quickly inform your engagement strategies.

Learn how you can leverage Borealis to streamline your stakeholder mapping and engagement strategy.

If you need help

For over 15 years, Borealis Software and its dedicated team of Customer Success Specialists have been helping organizations in different industries all around the world take stakeholder management to the next level. Borealis provides the tools and expertise needed to efficiently engage with key stakeholders and secure their support.

Borealis stakeholder engagement software, methodology, and the best practices we’ve acquired from our global community of practice can help your team to:

- Put your engagement plan into action
- Facilitate land acquisition
- Meet lender requirements
- Comply with international best pratices
- Demonstrate compliance
- Measure outcomes over time to facilitate audits
- Gain & maintain social license to operate
- Align, monitor & report processes for multiple sites
- Improve reporting
- Optimize social performance / Community relations activities

Take your stakeholder engagement to the next level

with advanced modules that can be added on demand to better manage and demonstrate specific areas of corporate social responsibility.

- **Social Investment**
- **Grievance Management**
- **Land Access**
- **Compliance Management**
- **Environmental Monitoring**
- **Land Management**
- **Local Content**
- **Social Baseline**

About Borealis Software

Borealis stakeholder software is an integrated information management system used by organizations around the world to manage all aspects of stakeholder engagement according to industry best practices and international standards.

- **Community Engagement**
- **Land Access and Management**
- **Public Affairs and Government Relations**
- **Social and Environmental Performance**

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