Stakeholder Personality Assessment

We assess our stakeholders' personas as part of our human instincts.

But there are other reasons:

- It is a fundamental building block of any relationship building.
- CS Playbooks and processes require fine-tuning, depending on the type of person we engage.
- Effective stakeholder management is based on understanding their objectives and thought process (which is driven by their personality)

Learning about your stakeholder's mindset and attitude is not a simple task. Reading their LinkedIn profile is not sufficient. You are expected to rely on your soft skills to assess their personality, communication style, decision-making process, etc.

This approach can be modularized into a simple framework, which I found intuitive and easy to follow. It requires your understanding of two human "dimensions":

- The tendency to be Reactive or Proactive
- Being a structured "thinker" as opposed to being a "Freestyle" lover.

Human relationships can be complicated to manage. However, there are many dimensions according to which we can profile people's behavior. Therefore, I created the infographic to assist CSMs in identifying the appropriate approach to manage stakeholders and find avenues to engage them.

You are welcome to leverage the framework and share your feedback with me.

Freestyle

- Ask questions about stakeholder’s roles and objectives
- Understand if the stakeholder can be influenced by other stakeholders you know (or should know).
- Relate value-added activities to the customer’s existing plans and objectives.
- Initiate verbal/audio-based communication to keep stakeholders in the loop
- Consider involving a colleague from your team with a similar “freestyle” approach (and gauge the interaction)

- Take notes (many topics might be “flying” in the air)
- Use proactive questions to understand the objectives and the corresponding business value
- Maintain prioritization of initiatives and value-added activities
- Maintain an action log to track the next steps
- “Weigh” requests and ideas in the context of stakeholders’ influence and level of decision making

Reactive

Proactive

- Ask questions about stakeholder’s roles and objectives
- Inquire about written documentation and resources that can help you gain stakeholders’ trust.
- Ensure stakeholder is frequently updated via emails, reports, etc.
- Agree on pre-scheduled touchpoints /meetings
- Suggest potential value-added activities
- Drive decisions and next steps based on facts and previously agreed decisions.

- Exchange formal meeting summaries
- Define milestones and agree on respective due-dates
- Ensure stakeholder is frequently updated via emails, reports, etc.
- Maintain pre-scheduled touchpoints mixing formal updates with brainstorming
- Ask about potential value-add activities
- Let the stakeholder drive decisions and the next steps (with your support).

Structured