Designing Your Engagement Strategy—Application Tool
Introduction

You most likely have experience using some form of employee engagement. Your experience may have been positive, and therefore, you are confident about using a high level of participation in your change effort. Or, you may have run into difficulty and are now concerned about how to engage employees and other stakeholders without triggering problems. No matter which experience you have had, it is important to take a moment and reflect on what you did in the past, how it went, and what conditions supported or prevented a positive outcome.

The purpose of this application tool is to help you design your stakeholder engagement strategy using a series of worksheets. On Worksheet 1, you will assess your track record with stakeholder engagement. If you have recently conducted a change history audit or employee readiness and capacity assessment, review that data as input. The underlying assumptions and beliefs your executives and change leaders hold about leadership, followership, and participation will have a direct influence on how much engagement is used in your organization, and what types and vehicles are employed. Worksheet 2 asks a series of questions about the individual and collective beliefs and assumptions of your change leaders. Helping them become aware of their assumptions will help them consciously choose your engagement strategy based on what is needed to succeed, rather than unconsciously allowing their past experiences to dictate it.

Worksheet 3 helps you prepare for your actual engagement strategy in this change effort. On Worksheet 4, you formalize your strategy. Remember to continue to review and course correct your strategy throughout your change effort to ensure that your current good ideas still fit the readiness level and needs of your organization as your change unfolds.

Before completing this tool, read the Supplemental Resource: Stakeholder Engagement.

Instructions

Step 1 Engage your change leadership or executive team to do this work, or identify the best people to: (1) assess your organization’s track record with employee engagement, (2) identify your change leaders’ underlying mindsets about participation, and (3) create your engagement strategy. Be sure to include any people in your organization who are knowledgeable about the different types and vehicles for engagement and how to use them effectively.

Step 2 Worksheet 1 focuses on your organization’s history with stakeholder engagement so that you can apply your learnings and success to this change effort. Doing this work collectively as a change leadership team will help build alignment among your change leaders for using engagement to your greatest advantage. As a group, complete the worksheet. First, list the change tasks in which you have historically engaged stakeholders, especially employees (see the Supplemental Resource: Stakeholder Engagement). Then list the stakeholders you engaged in these tasks. Next, list the types of engagement you employed, and the vehicles you used. Then, identify why the engagement succeeded or failed, and what you learned. Finally, capture any conclusions you draw for your current change effort.

Step 3 Worksheet 2 focuses on identifying the underlying assumptions and
beliefs your change leaders have about stakeholder engagement. These assumptions may have played out in the experiences you identified on Worksheet 1. You may want to think about your answers first by yourself, before engaging your entire change leadership team in this discussion.

Step 4 Worksheet 3 asks you strategic questions to prepare you for creating your overall engagement strategy. Answer these questions with your change leadership team.

Step 5 Using your insights and guidance from Worksheets 1, 2, and 3, use Worksheet 4 to create your actual engagement strategy for this change effort. After reviewing the Supplemental Resource: Stakeholder Engagement, fill in the matrix with your change leadership team. First identify the key change tasks in which you want to engage stakeholders. Then, if you have one, review your Project Community Map for which stakeholder groups you want engaged in each task. (You may have multiple groups.) Identify each group’s commitment level to the change. Then for each change task, decide the Types and Vehicles of engagement you will use for each stakeholder group. Lastly, list any special needs or considerations for each group. Congratulations! You now have a well planned engagement strategy for your change effort!

Step 6 Identify how and when you will oversee and revisit the fit of your strategies as your change unfolds.

Step 7 If needed, obtain approval for your engagement strategy, and decide how to communicate it and to whom.
# Worksheet 1

Your Track Record with Stakeholder Engagement

<table>
<thead>
<tr>
<th>Change Task</th>
<th>Stakeholder Groups</th>
<th>Types of Engagement</th>
<th>Vehicles of Engagement</th>
<th>Why Succeeded</th>
<th>Why Failed</th>
<th>Key Learning</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Worksheet 2
Identifying Underlying Assumptions and Beliefs About Stakeholder Engagement

1. Ask each change leader to answer each question several times, and fill in each section with at least three different answers or, brainstorm the answers as a group, listing all answers given. Any type of answer is acceptable—doubts, fears, hopes. Then discuss as a group.

- If we increase participation, then:
  - We will:
    - Employees will:
    - Other stakeholders will:
    - Our change effort will:

- High engagement is good (because, if, when):

- High engagement is bad (because, if, when):

- Low engagement is good (because, if, when):

- Low engagement is bad (because, if, when):
Worksheet 2 (cont’d)

2. Based on your responses and discussion, list the key assumptions you hold as a group about stakeholder engagement. Consider beliefs or fears about giving people too much control, about needing to satisfy everyone’s needs, about looking like you don’t know what you are doing if you need to ask your employees for input, etc.

Positive Assumptions:

Negative Assumptions:

3. Determine as a group which of these assumptions are valid enough to influence your engagement strategy. List those here.

4. Review the values and guiding principles for this change that you created earlier in your change work (if you did this work). Identify and resolve any conflicts between your preceding “valid assumptions about engagement” and your values and guiding principles. Add to, delete, or modify your values and guiding principles as needed. Conclude as a group, and list the values and guiding principles that will direct your engagement strategy.
Worksheet 3

Preparing for Your Engagement Strategy

1. What outcomes do you want to achieve from engaging stakeholders in this change effort? (For example, increased morale, better design solution, reduced resistance, etc.)

2. What factors must you take into account when selecting the ways in which you will engage your people? Consider their level of readiness and capacity to take on more work, time urgency, excitement, and confidence in having something of value to contribute, etc.

3. In which change tasks is a high level of employee engagement most essential?

4. Which stakeholder groups in your project community are most important to engage? Why?

5. What types or vehicles of engagement will you use most frequently? Why?
### Worksheet 4

Creating Your Engagement Strategy

<table>
<thead>
<tr>
<th>Change Task</th>
<th>Stakeholder Group(s)</th>
<th>Commitment (H-M-L)</th>
<th>Type</th>
<th>Vehicles</th>
<th>Special Needs or Considerations</th>
</tr>
</thead>
</table>

© 2010 Being First, Inc.
All Rights Reserved.

www.beingfirst.com
www.changeleadersnetwork.com/blog