Stakeholder mapping – key points to consider

Understand your requirements:

- What is it you need from stakeholders and how do you need it:
    - Data
    - Knowledge
    - Access to sites
    - Case studies
    - Dissemination opportunities
- Identify levels of stakeholders involvement and likely impact - those that are critical, those that are nice-to-have
- When do you need them? At the proposal stage or further into the programme of work
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Consider what you can offer:

- Opportunity to influence research direction
- Interim results (early win)
- Final outputs tailored to stakeholder needs
- Access to wider research landscape, your expert knowledge

Understanding stakeholder perspectives:

- Large organisations often have many smaller departments who may need to be involved
- Policy/culture context – making links takes time. Consider motivation and
- Consider the best language/approach to use for groups of stakeholders

Smoothing the process:

- Engagement – who, when, with what? Consider the various stages in project planning
- Work to understand stakeholder motivation, priorities, timescales
- Be clear and realistic on what you can offer – manage expectations
- Identify efficiencies to make engagement more symbiotic
- Recognise intangible work – the need to work with stakeholders to identify what they need – a learning journey

Regular reflection:

- An iterative process – mapping takes time but helps prioritise action
- Recognise stakeholders (both individuals and organisations) might change as the project progresses
- Interest will fluctuate during the project – identify key points to engage
- Be flexible where possible, both in your planning and in reacting to evolving stakeholder requirements

Stakeholder engagement – strategy checklist

	Priority	Time
Use other people's (established) contacts – ask PIs/Co-Is, peers, networks		
Contact experts in the field of research [question how you know who the experts are?]		
Early on, identify possible stakeholders, map against which groups you want to influence, which you want to get input from etc. Who are the critical stakeholders?		
Consider timeframe for when to be engaging and the degree of engagement required with the stakeholder – draw on stakeholder mapping exercise		
Perspective of the funding institution – advice from EPSRC, contact portfolio manager		
Identify most appropriate mechanism of engagement. Consider social media e.g. twitter, LinkedIn – use it to approach specific stakeholders. Do you need a 1-page summary?		
At all stages, think of resource/cost implications. Check availability		
Spend time gaining an understanding of what interests the stakeholders and what interest they have in collaborating with researchers. [follow social media feeds to see what stakeholders are posting and discussing – good for getting a rapid current understanding]		
Are you staying in your comfort zone or identifying the comfort zone of your stakeholders and working within that comfort zone?		
Discuss how stakeholders gain their information. Are you giving information in a manner that is useful to them? Ask what the stakeholders found most useful of the material used – learn		
Use broader events to identify potential stakeholders – conferences, seminars, blogs		
When you contact your stakeholders, work with them to define the research programme – a great way to tease out what your stakeholders are interested in and catering for that within the design of your research programme		
Get a feel for the motivation of participants – distilling what is useful and current? Make use of experience but critically reflect as time goes by. Reflect on your strategy, are these the right people? Are they still the right people?		
Establish common expectations		
Milestones that allow for some flexibility especially in the longer-term as timings/requirements evolve, and recognise review of strategy is needed		
Some organisations/individuals might say no at the start, but as you have findings, they might be more willing to engage. Don't give up when you think there is something useful.		
Follow up after meetings, sustain the relationship, don't just contact when you want something.		
Think how best to keep the stakeholders engaged with the project – is a website enough? People like to engage and be engaged with in different ways – is a newsletter useful/not; workshops/meetings – time consuming and expensive but face to face contact is important; occasional skype catch ups?		
Think through why you have decided on the activities you've carried out, how did they work? Be critically reflective and make use of learning for evolving your stakeholder engagement strategy		
Industry forums – can you make use of existing industry activities and tap into them – efficient for you, efficient for your stakeholders! Don't think you have to make all the contacts yourself, use existing mechanisms (e.g. ARCC network) as conduits into these established groups		