Crosswind Success Series:
PMP® Exam Bootcamp Manual

www.crosswindpm.com

Tony Johnson, MBA, CAPM, PMP, PgMP, PfMP

Plan Stakeholder Engagement

Inputs

Project Charter
Project Management Plan
- **Resource Management Plan**
- **Communications Management Plan**
- Risk Management Plan

Project Documents
- Assumption Log
- Change Log
- Issue Log
- Project Schedule
- Risk Register
- **Stakeholder Register**

Agreements
Enterprise Environmental Factors
Organizational Process Assets

Outputs

Stakeholder Engagement Plan

Tools and Techniques

Expert Judgment
Data Gathering
- Benchmarking

Data Analysis
- Assumption and Constraint Analysis
- Root Cause Analysis

Decision Making
- **Prioritization/Ranking**

Data Representation
- Mind Mapping
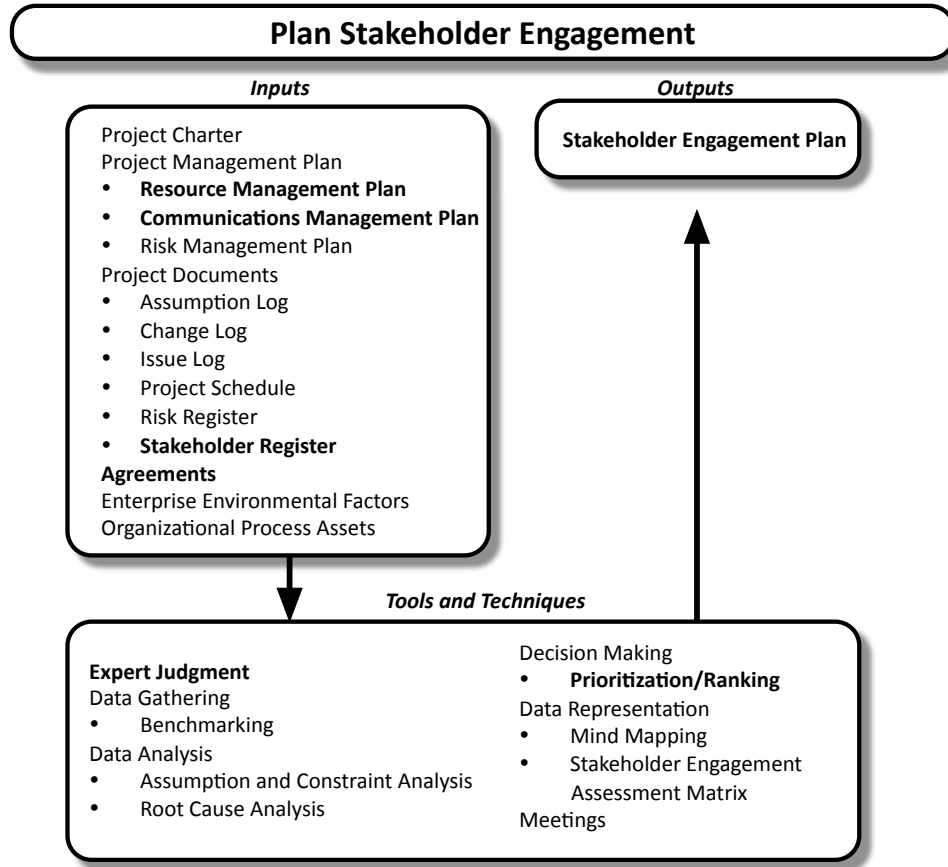- Stakeholder Engagement Assessment Matrix

Meetings

Figure 6-6: Plan Stakeholder Engagement Data Flow Diagram
The source for the above figure is the Project Management Institute, *A Guide to the Project Management Body of Knowledge*, (*PMBOK® Guide*) – Sixth Edition, Project Management Institute Inc., 2017, Figure 13-4 Page 516

Plan Stakeholder Engagement (Planning)		
Key Inputs	Resource Management Plan	The resource management plan is a component of the project management plan that documents: the manner in which the team and physical resources are determined, quantified, and acquired; resource roles, responsibilities, authorities, and competence (skill and capacity); project organizational charts; team resource management (definition, management, control, and release); team training; team development; and control of physical resources (availability and acquisition).

		Plan Stakeholder Engagement (Continued)
Key Inputs (Cont.)	Communications Management Plan	The communications management plan is a component of the project management plan that documents the planning, structure, implementation, and monitoring/control of communications. It contains: stakeholder communication requirements; the information to be communicated, including language, format, content, and degree of detail; the case for conveyance of the information; the timeframe for and frequency of the distribution, including the manner in which any acknowledgment or response will be effected; the person responsible for communication of the information; the person responsible for authoring release of confidential information; the recipients of the information and their needs, requirements, and expectations; the resources allocated for communication related activities, along with a calendar and budget; the technological methods used for conveyance of the information, including memos, email, press releases, and social media; the methods for updating the communications management plan; a glossary of common terms; flow charts regarding the project's information flow, workflows, meeting plans, and a list of reports; constraints imposed by legislation, regulation, and/or technology; guidelines and templates for project status meetings, project team meetings, and email.
	Stakeholder Register	The stakeholder register contains information related to identified stakeholders. It includes identification information (name, position, location, project role, and contact information), assessment information (key requirements, potential impact on project results, phase in which stakeholder wields the greatest influence, and expectations), and stakeholder classification (impact/influence/power/interest, internal/external, or other classification model).
	Agreements	Agreements define project intentions and can be written (such as **letters of agreement**, **contracts**, **memorandums of understanding**, **service level agreements**, and email) or verbal. For work to be performed by an external source, a contract between buyer and seller is typically used and coordination with the procurement/contracting group is involved to guarantee the competent management of contractors and suppliers.

PMI, PMP, and PMBOK are registered marks of the Project Management Institute, Inc.

158

© 2008-2020 Crosswind Learning, www.crosswindpm.com

Plan Stakeholder Engagement (Continued)		
Key Tools & Techniques	Expert Judgment	Expert judgment is judgment based on expertise acquired in a specific area. It is often more significant and accurate than the best modeling tools available and can be provided by stakeholders, company personnel external to the project, professional organizations or groups, and consultants. It is important to consider expertise related to the organizational politics and power structures, organizational culture, the relevant industry, and a knowledge of the expertise and contributions of individual team members.
	Prioritization/ Ranking	A decision making technique used to prioritize and rank stakeholders based on interest and influence.
Key Outputs	Stakeholder Engagement Plan	The stakeholder engagement plan is a component of the project management plan that documents the management approach and activities utilized to competently engage stakeholders.

Situational Question and Real World Application
Failure to effectively perform the Plan Stakeholder Engagement process may result in stakeholder communication issues, such as failure to inform a stakeholder of status updates to issue logs or change requests and approvals.

6.3.1.   Stakeholder Engagement Plan

The stakeholder engagement plan can be formal and structured or informal and unstructured. The purpose of the document is to establish guidelines for the engagement, management, and control of stakeholders and their expectations.

Know what a stakeholder engagement plan is and its purpose.

The plan helps the project manager and team:

- Compare the current and desired level of key stakeholder engagement
- Identify interrelationships between stakeholders
- Identify stakeholder communications requirements
- Update the stakeholder engagement plan when needed

6.3.2.   Stakeholder Engagement Assessment Matrix

The stakeholder engagement assessment matrix is used to compare the current and desired level of stakeholder engagement.

Stakeholder	Unaware	Resistant	Neutral	Supportive	Leading
Tony					D,C
Jake			C	D	
Patty		C		D	
Duane		C			D
Nikki				D,C	

C = Current, D = Desired (Level of Engagement)

Figure 6-7: Stakeholder Engagement Assessment Matrix

The source for the above figure is the Project Management Institute, *A Guide to the Project Management Body of Knowledge*, (*PMBOK® Guide*) – Sixth Edition, Project Management Institute Inc., 2017, Figure 13-6, Page 522

The matrix helps focus the team on stakeholder interaction. As the project evolves, the objective is to have the C (current) and D (desired) in the same cell for each stakeholder.

The source for the above text is the Project Management Institute, *A Guide to the Project Management Body of Knowledge*, (*PMBOK® Guide*) – Sixth Edition, Project Management Institute Inc., 2017, Pages 516-522

6.4. Manage Stakeholder Engagement (Executing Process Group)

The Manage Stakeholder Engagement process focuses on communicating with stakeholders, meeting their expectations, addressing their problems in a timely manner, and encouraging their commitment to the project.

This process enables an increased probability of success by ensuring that stakeholders are aware of project benefits and risks.

Know the Key Inputs, Tools & Techniques, and Outputs for Manage Stakeholder Engagement.