October 31 – November 2, 2016
Renaissance Boston Waterfront Hotel

Tuesday - Featured Talks

Preventing the Swoop-and-Poop with Successful Stakeholder Engagement

Kim Goodwin

PREVENTING SWOOP & POOP
WITH EFFECTIVE STAKEHOLDER ENGAGEMENT

@KimGoodwin

UI21, NOVEMBER 2016

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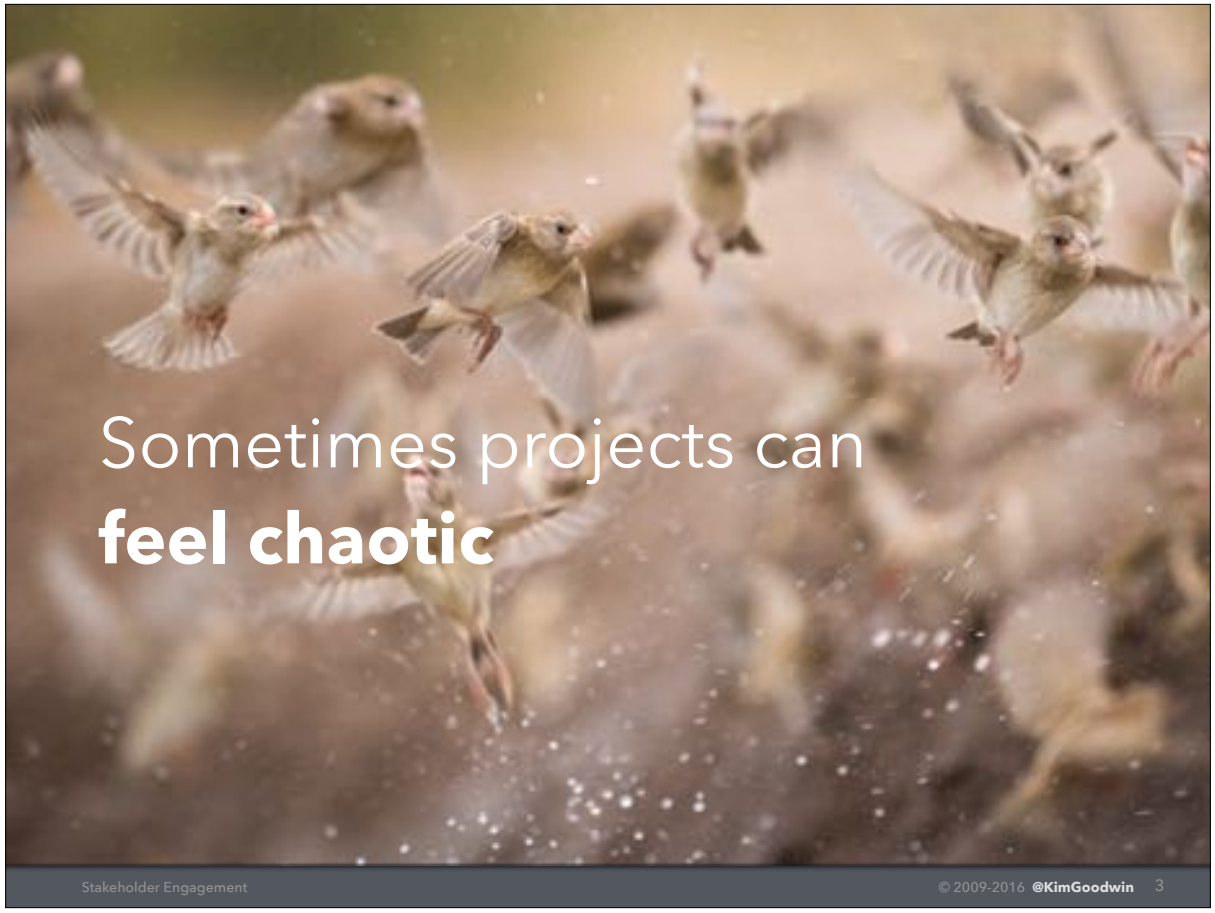

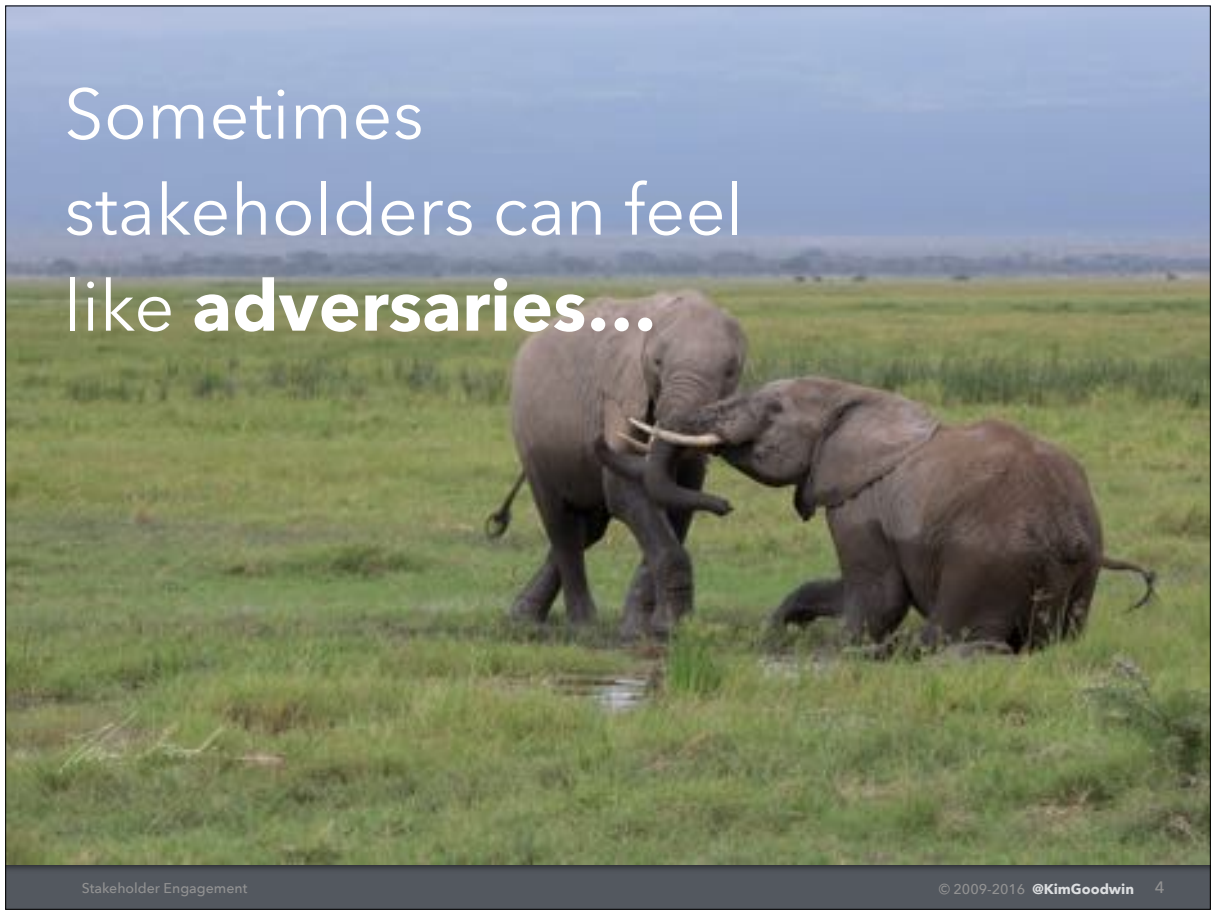

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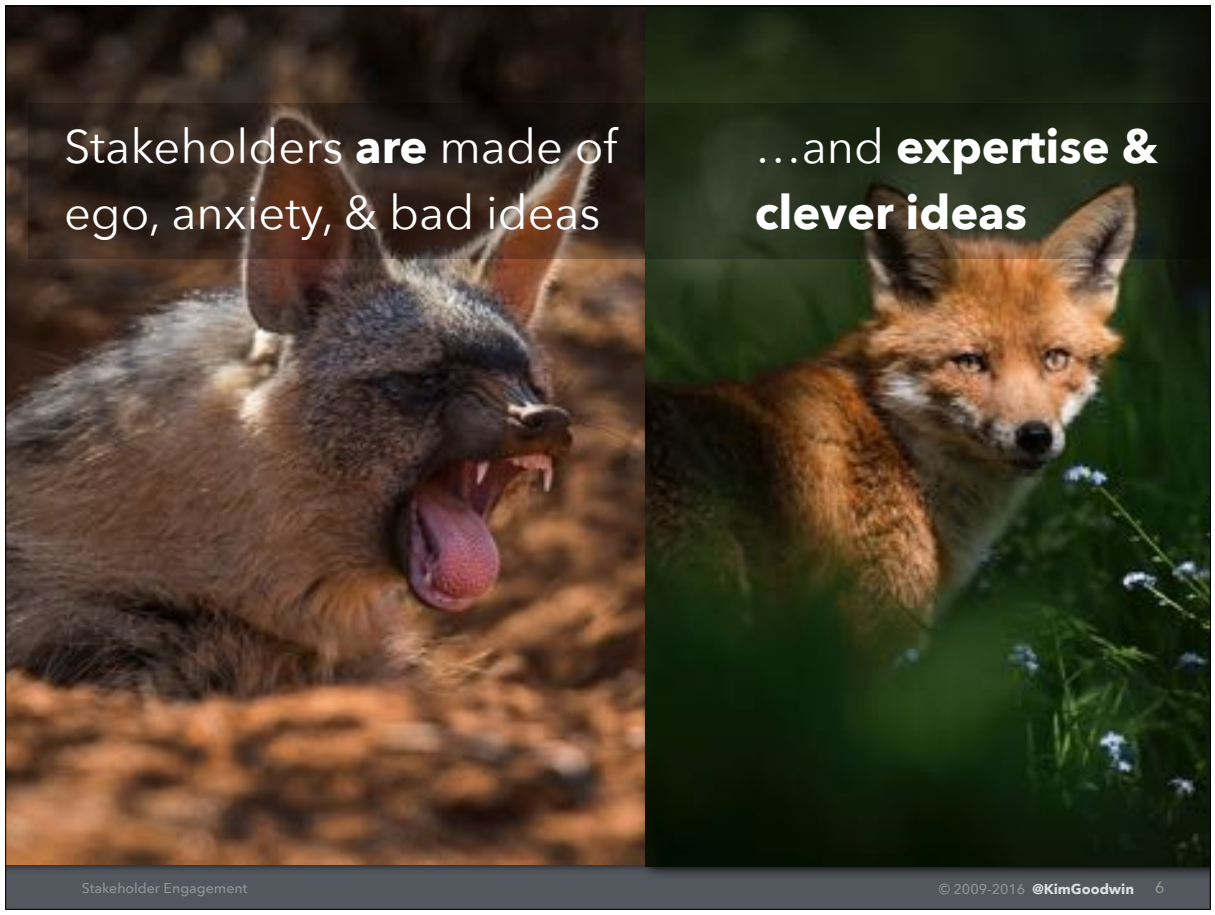

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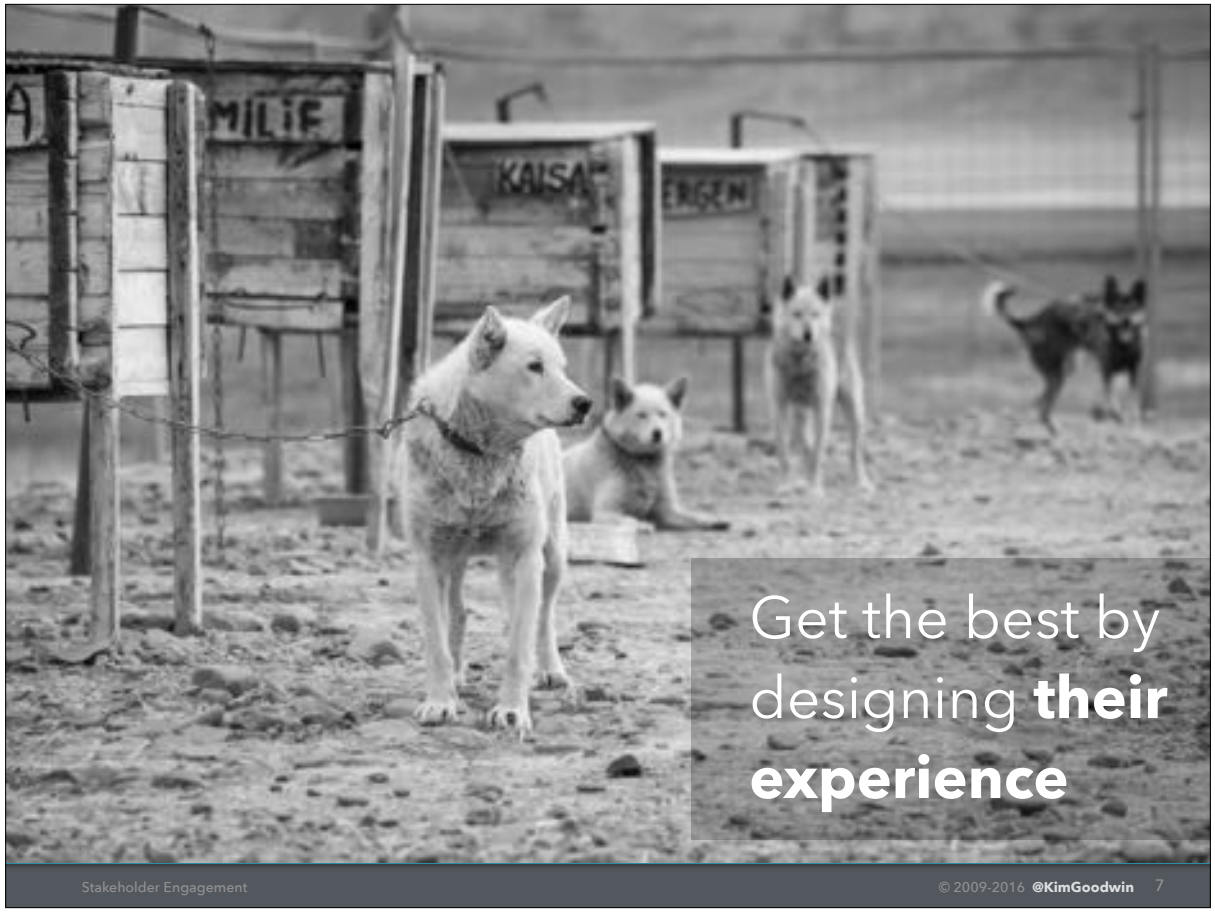

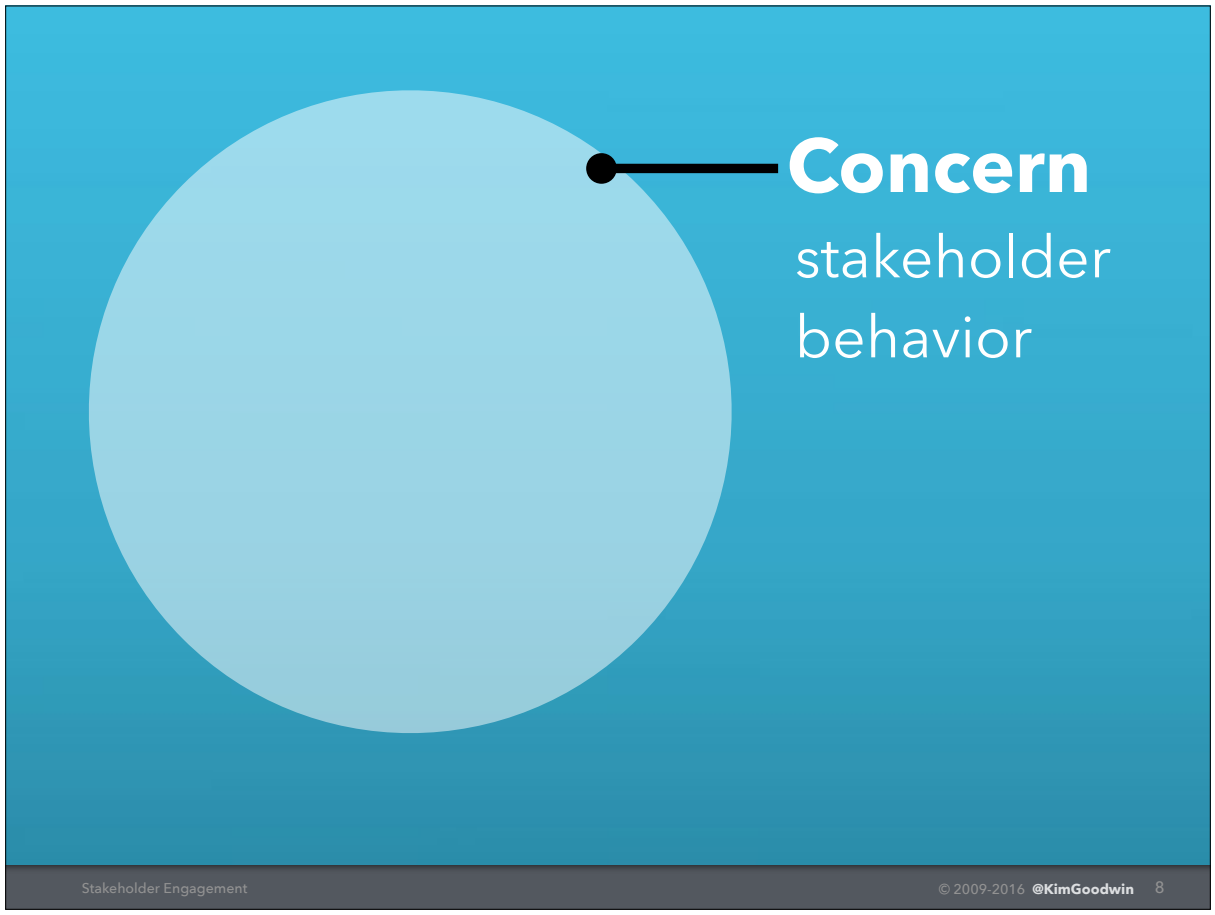

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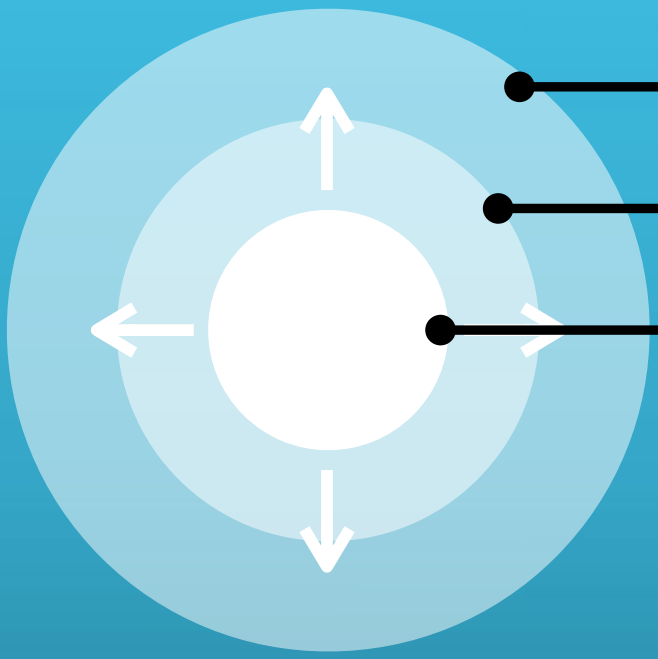

Concern

Influence

Control

your own behavior

It's like any **design process**

1. **Identify** "users" & roles
2. Understand & design for **context**
3. Understand & design for **them**

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Stakeholder *(noun)*

Person who signs off
on Jira stories?

Person with an opinion?

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R A C I

R A C I

Responsible for doing the work.

- Usually product / design / engineering trio
- May include (S): supporting team

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R A C I

Approves the work (since they're **accountable** for the outcome).

- Ideally one person; in reality often split 😕
- Feedback is **binding**

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Shared accountability is **tricky**

What head of one team "owns"

potential swirl zone

What head of other team "owns"

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R A C I

Consulted because they're experts

- Most "stakeholders" are really this
- Feedback is **non-binding**

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R A C I

Informed because understanding the plan is important to their jobs

- May be self-appointed "stakeholders"
- Feedback is **not necessary**

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CAIRO

Omitted can be a useful addition in "everybody involved" cultures

An abbreviated example:

Deliverable	PM	UX lead	UX team	Dev	Brand
Define UX vision, functionality & flow	R	A	R	R	C
Define visual style	C	A	R	I	A
Define build phases for sprints	A* / R	C	R	R	I
Define technical architecture	C	I	C	A* / R	O
Define rollout comms	C	C	I	O	A* / R

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At least **have the discussion,** preferably at a project kickoff with all "stakeholders"

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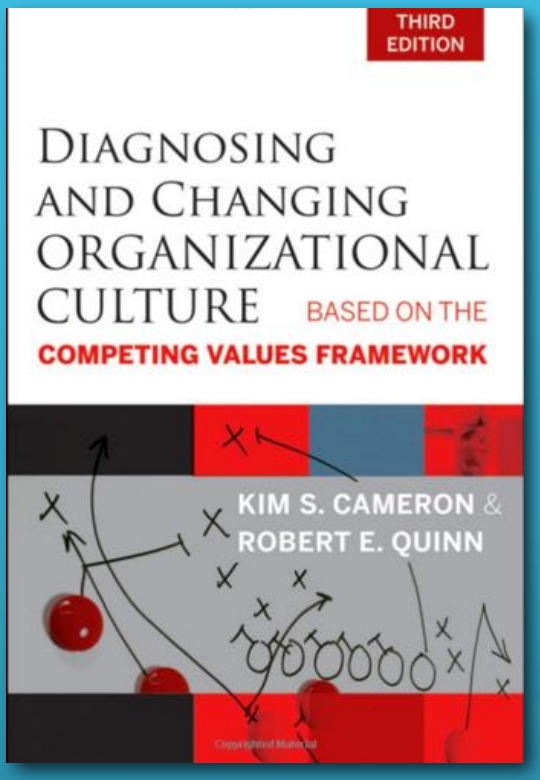
1. **Identify** "users" & roles
2. Understand & design for **context**
3. Understand & design for **them**

Decision styles

What process feels OK

What arguments do we value



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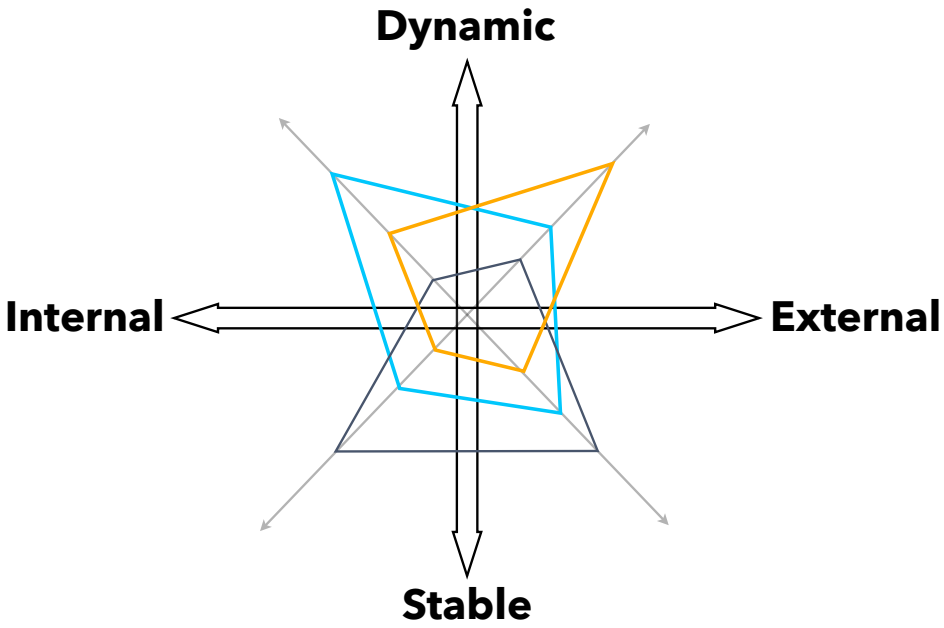
competing values framework

Simplified from Cameron & Quinn 2011, based on earlier works



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Wild West meets outer space: make it up as you go

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Respond well to:

- Whiteboard ninja
- User feedback
- Not "process"
- RACI informally

(it will change)

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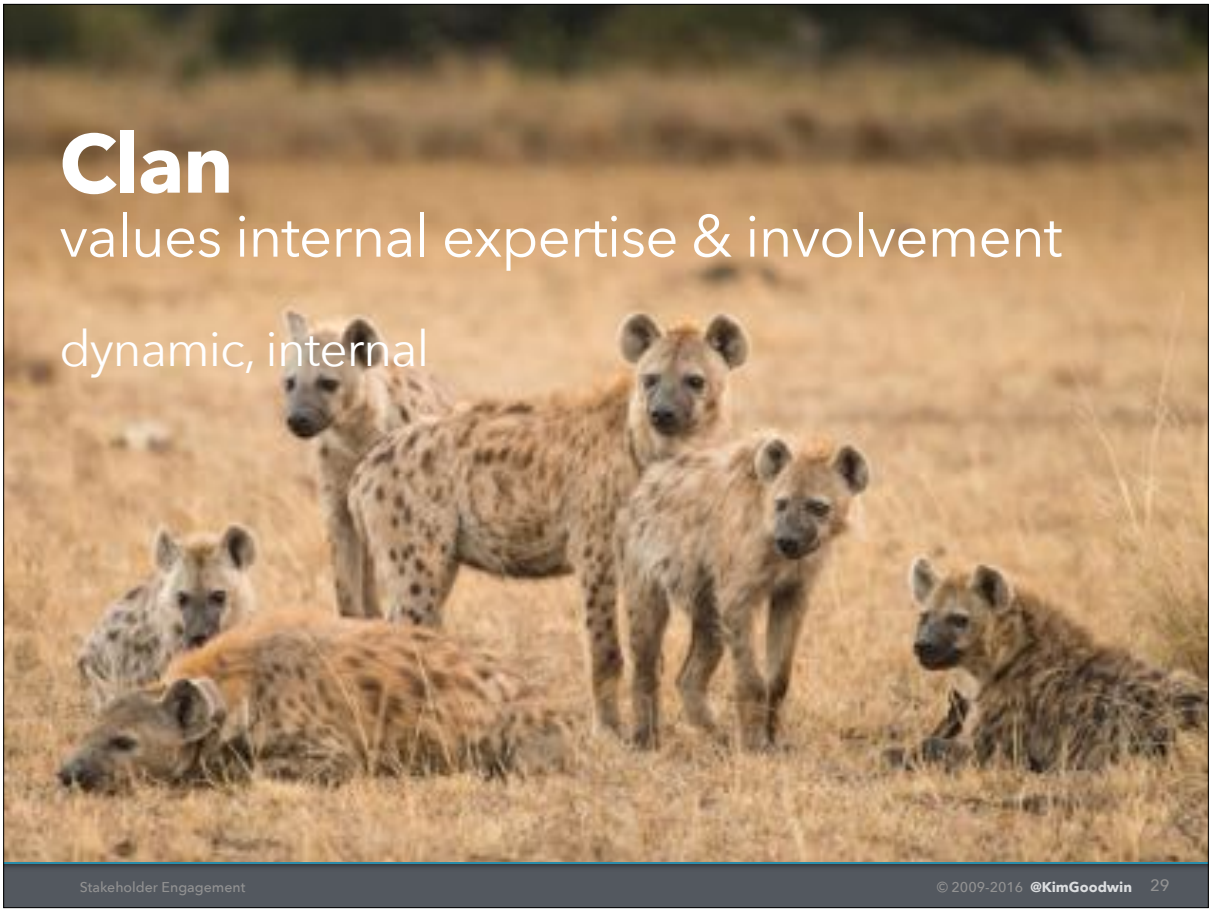

No drone
acts alone

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Respond well to:

- UX as facilitator, not expert
- Lots of involvement
- Consider CAIRO & assume it will be tricky

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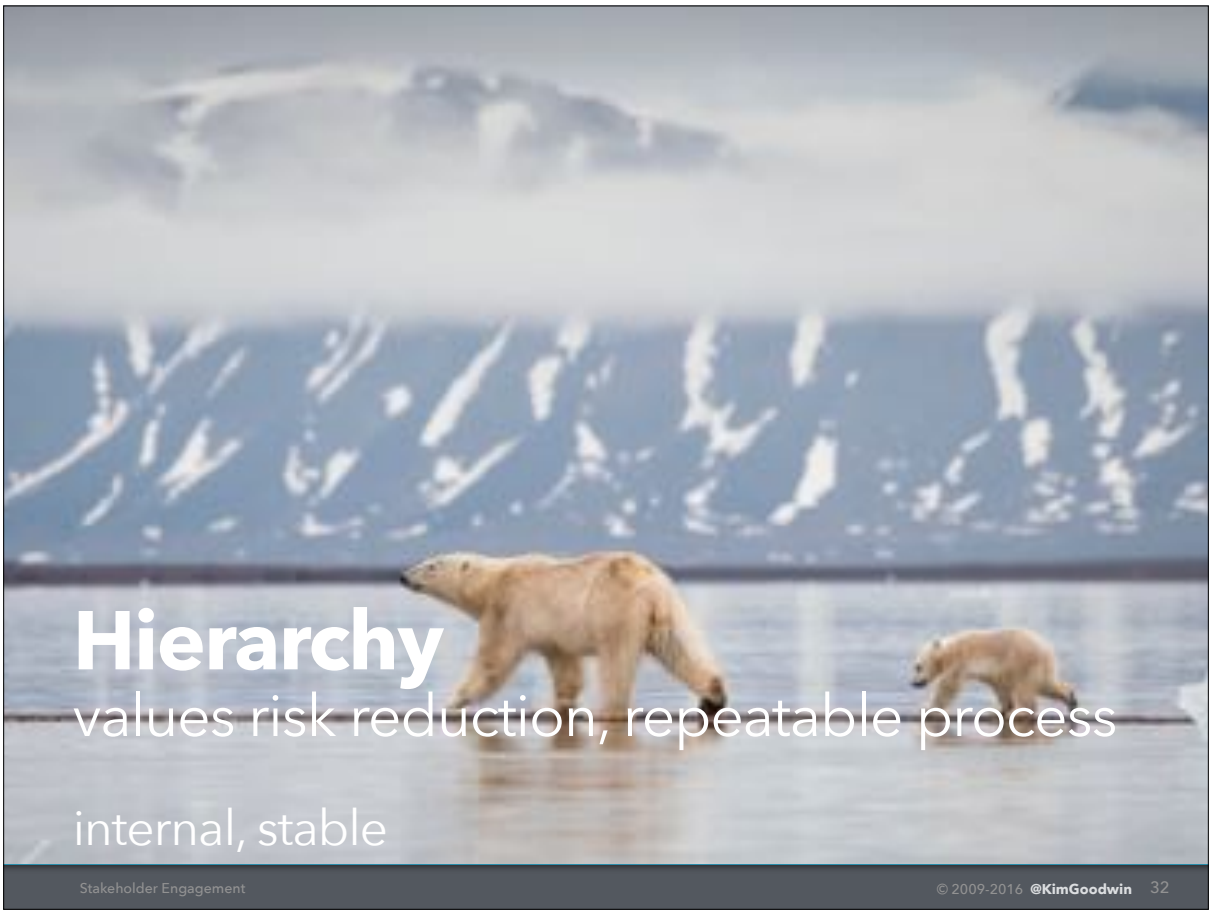

Hierarchy

values risk reduction, repeatable process

internal, stable

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There is always
a bigger boss

Respond well to:

- Expertise
- Risk reduction via processes & tools
- RACI? Bring it on

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Data is always the answer, even if it's wrong

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Respond well to:

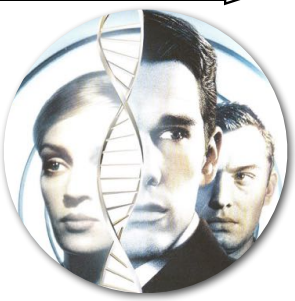
- Rigor & science
- Quantitative data
- Risk reduction
- RACI for speed

Learn to love a crowd

Avoid the P word

Work the system

Bring lots of data



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1. **Identify** "users" & roles
2. Understand & design for **context**
3. Understand & design for **them**

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Stakeholders have

Limited time

If mismanaged, can lead to

- Being uninformed or forgetful
- Feedback that's not what you need

I communicate constantly.

It's all in Jira!

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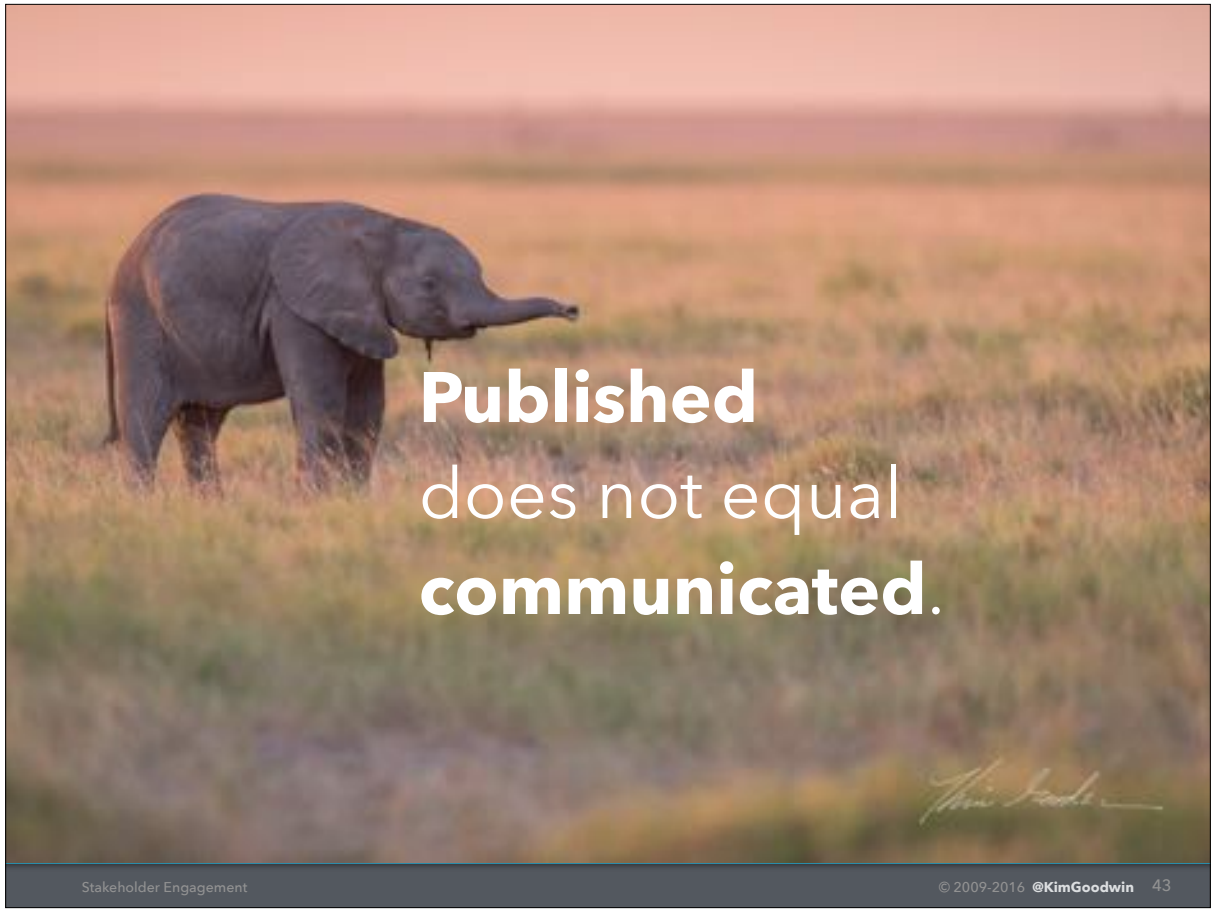
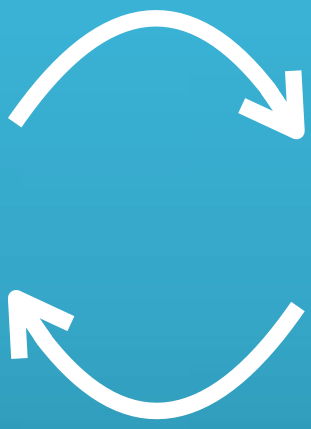


Communication has **two** parts

Information
provided



Understanding
confirmed

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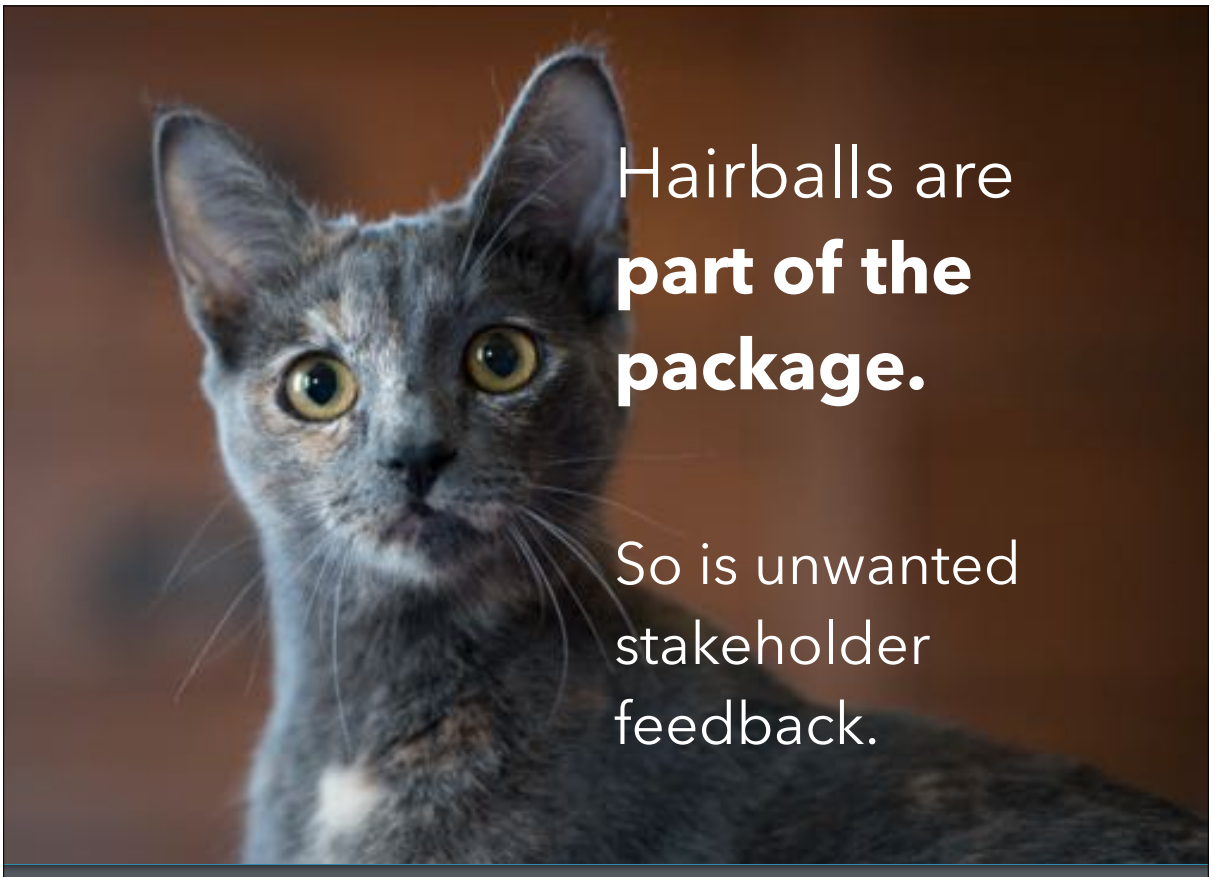
She didn't give me **good** requirements / feedback.

He keeps telling us **what** to design, ugh!



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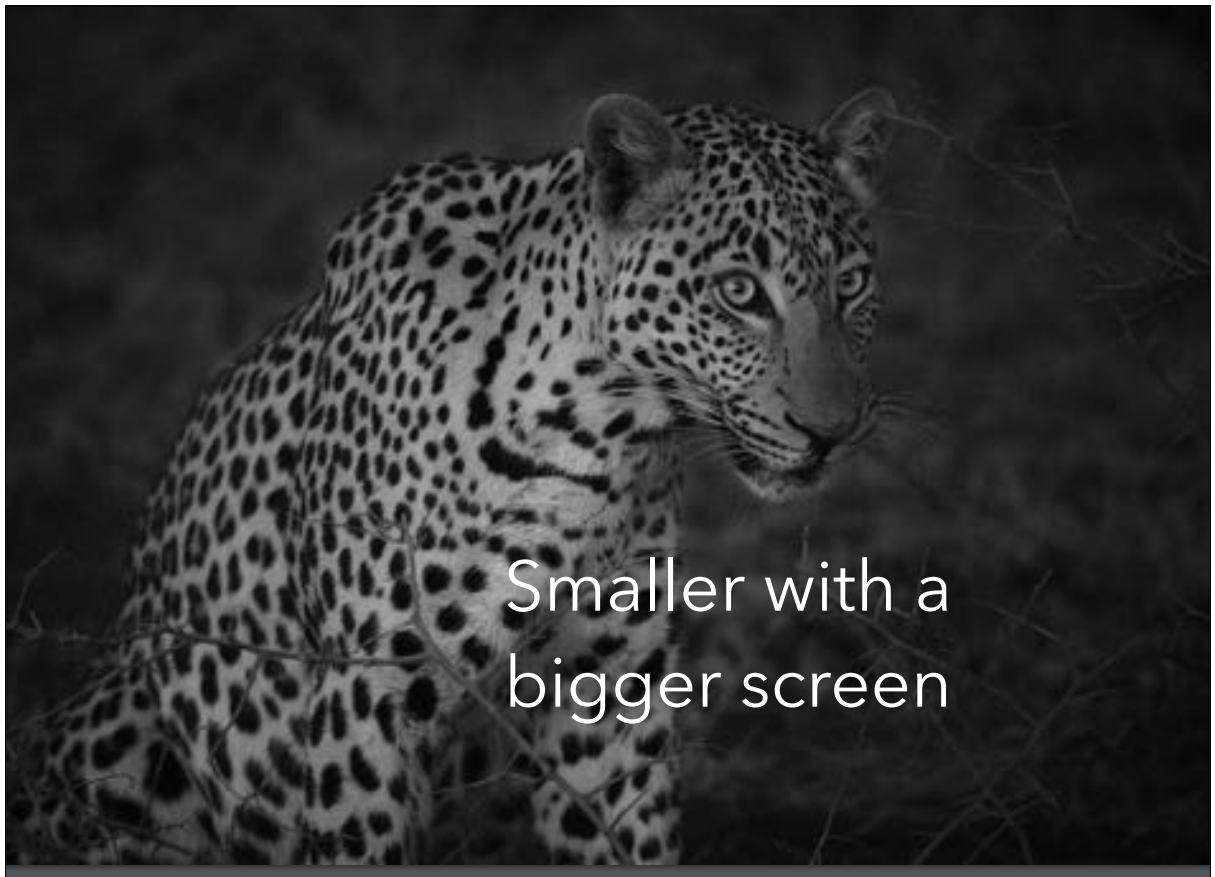
Accept what's given
(write it down & find value in it)

It's probably **not** about distrust in your skills

Assume competence & good intent



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Ask for what's not given

What would that feature / design accomplish?

Before we look at the work, I'll just say the feedback we most need today is…

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Stakeholders have	*If mismanaged, can lead to*
Limited time	• Being uninformed or forgetful • Feedback that's not what you need
Expertise & ideas	• Ego • Anxiety about whether you "get it"
Responsibility for outcomes	• Anxiety about outcomes

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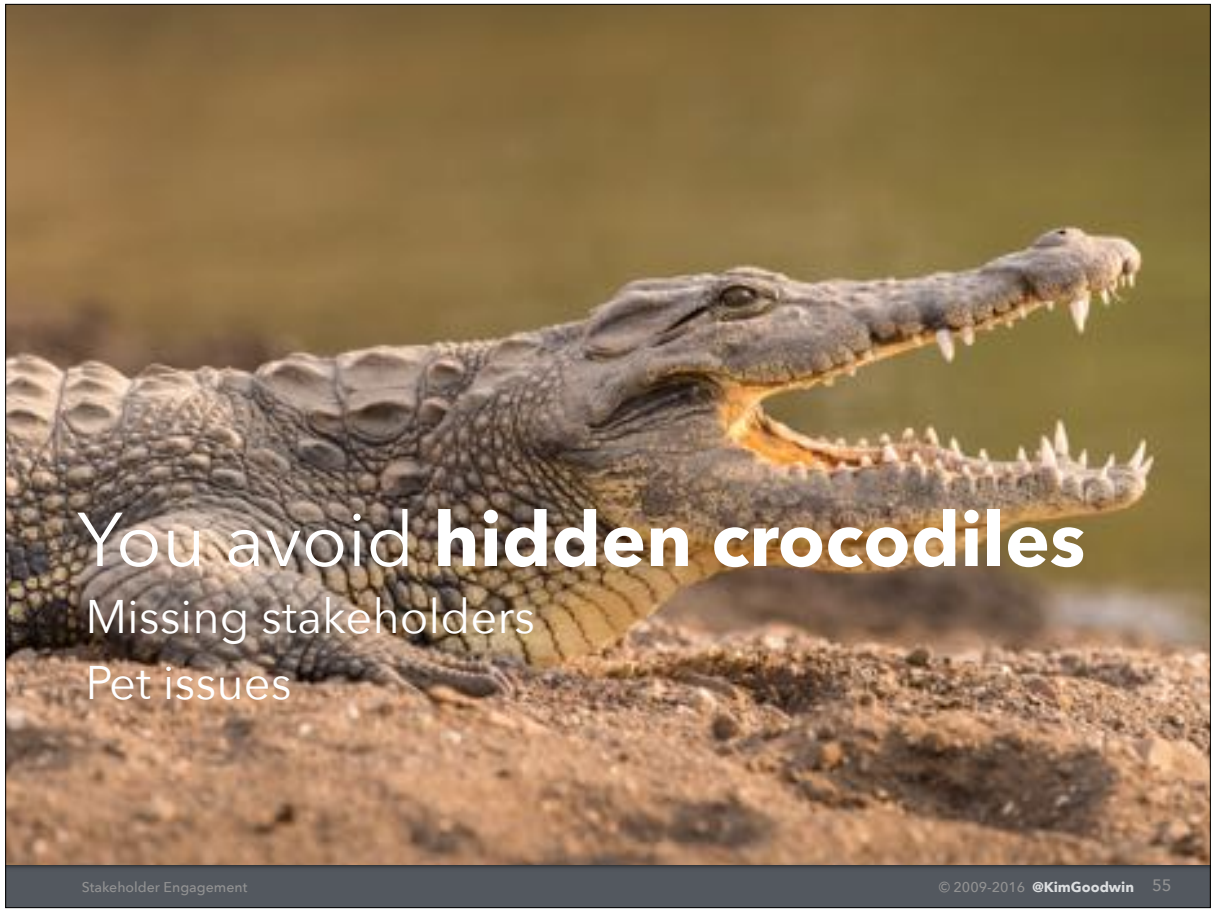

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Ask "dumb" questions without looking dumb

I want to make sure I understand YOUR take on this…

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Basics for most people:

- What do you think this project is about?
- Who is it for?
- When do we need it, and why?
- What's the worst thing that could happen?
- What should it accomplish for the business?
- How will YOU define success?
- How do you want to be involved, and what's the best way to involve you?
- Who else will influence the outcome?

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Product strategy & brand

- What new customers do we want in 3 years?
- Who are the biggest competitors and what worries you about them?
- How do you expect to differentiate us?
- How do you want people to see the brand?
- Is there any planned evolution in the identity?

Try to:

Reflect back your understanding

Share a plan & opportunities for involvement

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I'm not sure s/he really gets UX yet.

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For change to **happen:**

Perceived
LOSS

For change to **happen:**

Perceived
LOSS

Dissatisfaction with status quo

Clarity about what to change

Understanding of **how** to get there

Adapted from Alexander Horniman, Darden School of Business

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Denial

Anger

Bargaining

Depression

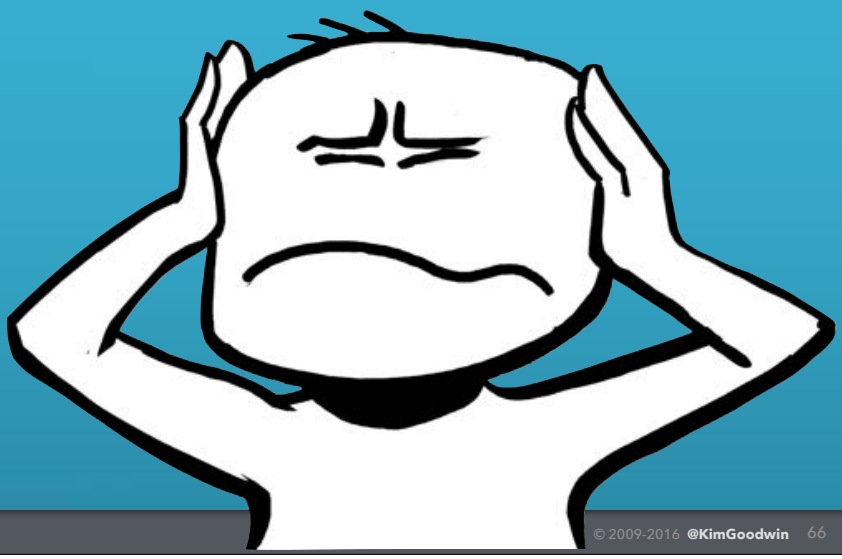
Acceptance

Has limitations, like all models....it's not really a linear process

Kubler-Ross, 1969

Denial, for example:

Create or amplify dissatisfaction



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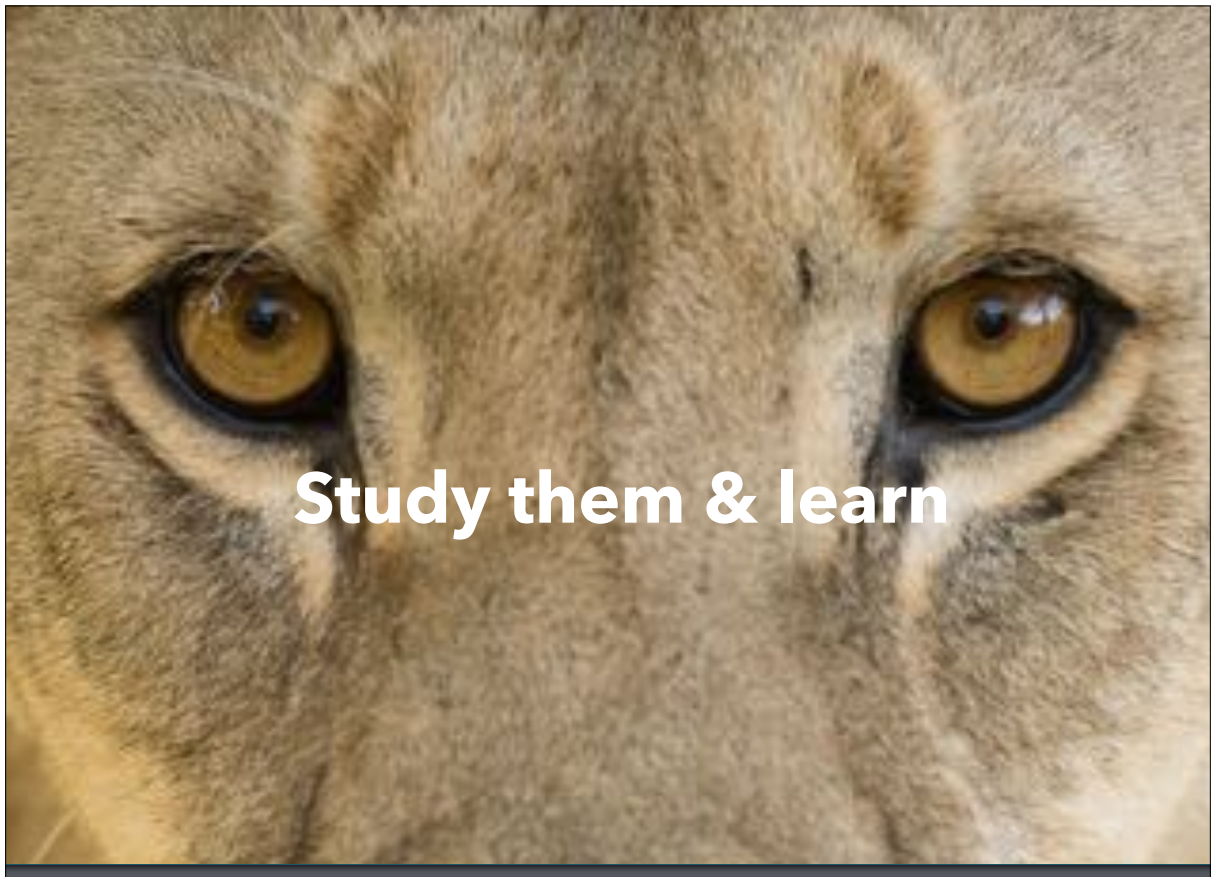
I can't get this person to engage.



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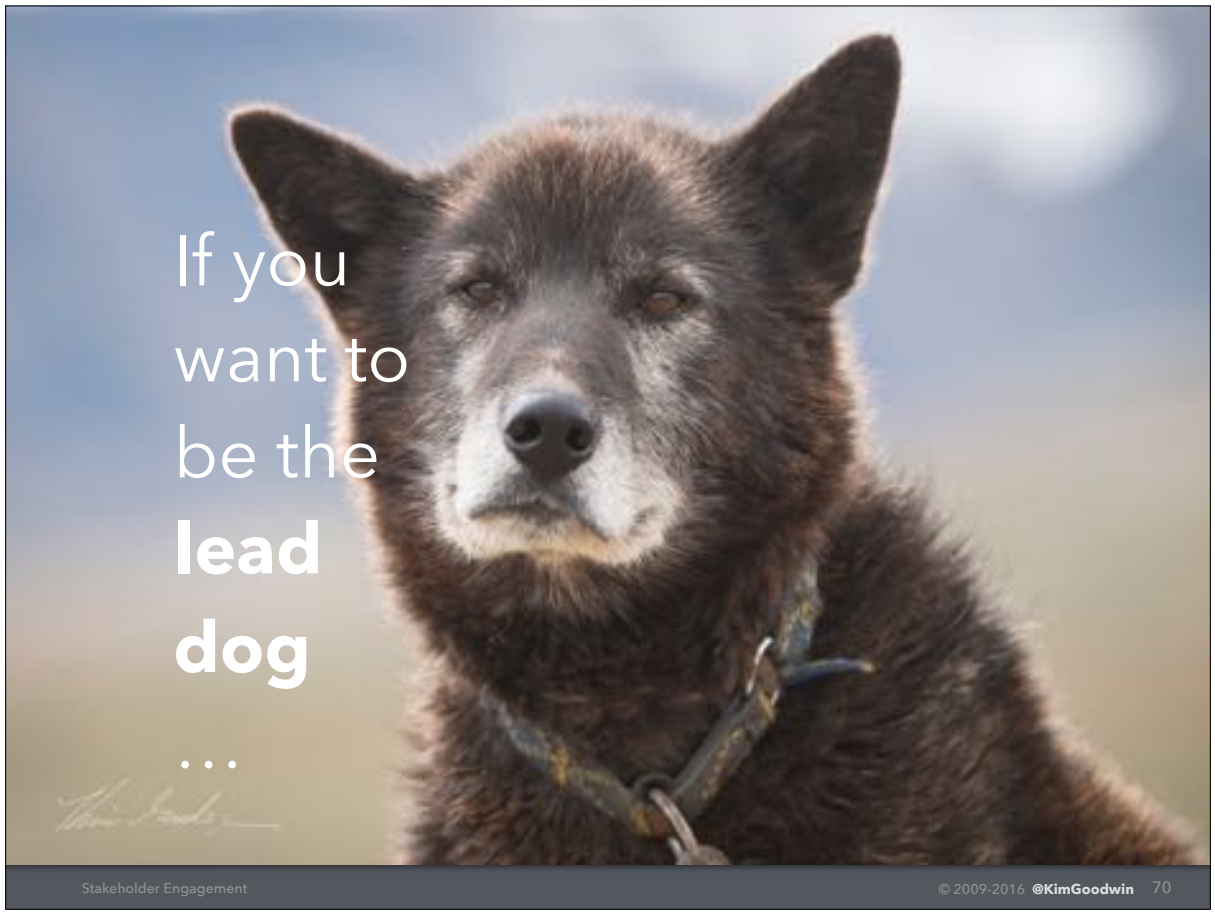

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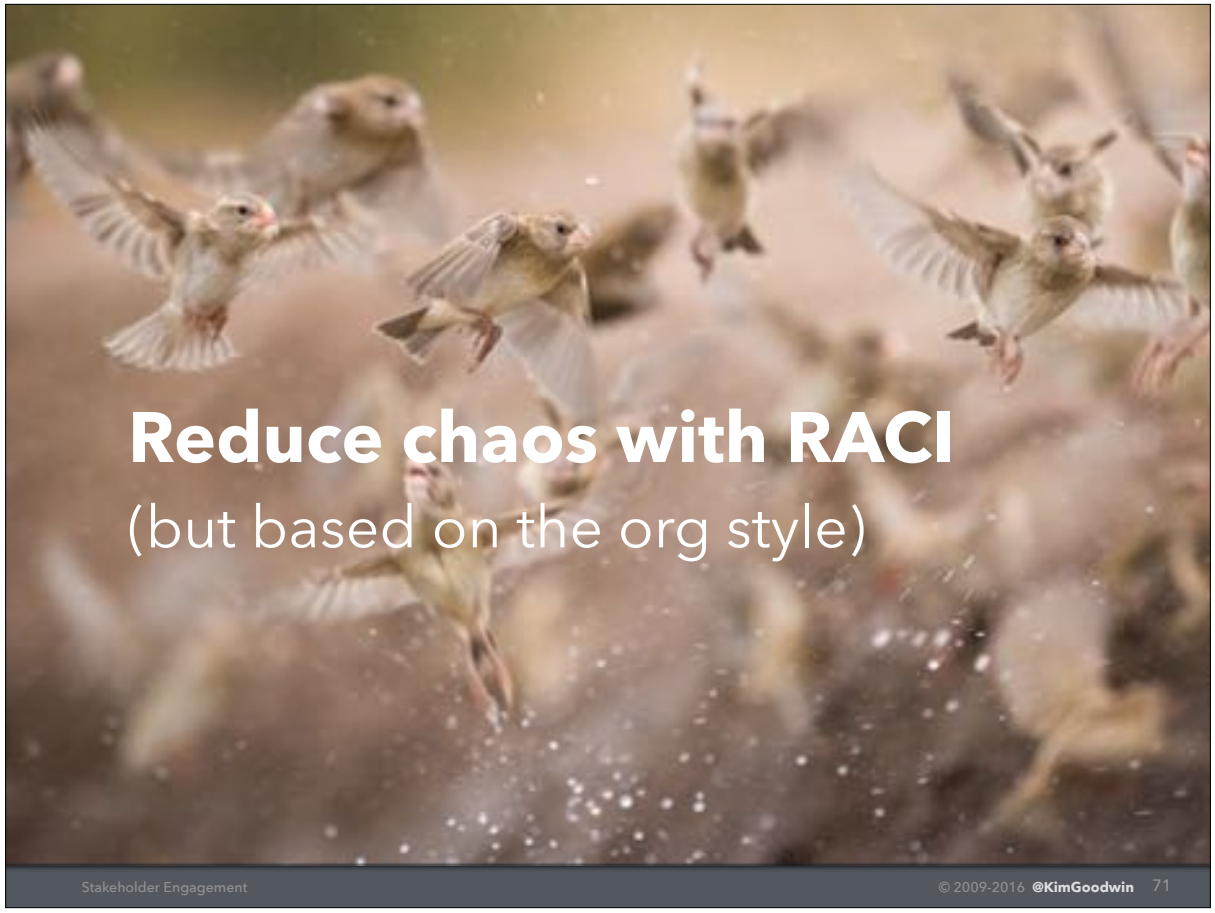

Maximize what matters

in project plans & arguments:

- Involvement
- Risk reduction & repeatability
- Data & more data
- Quick learning

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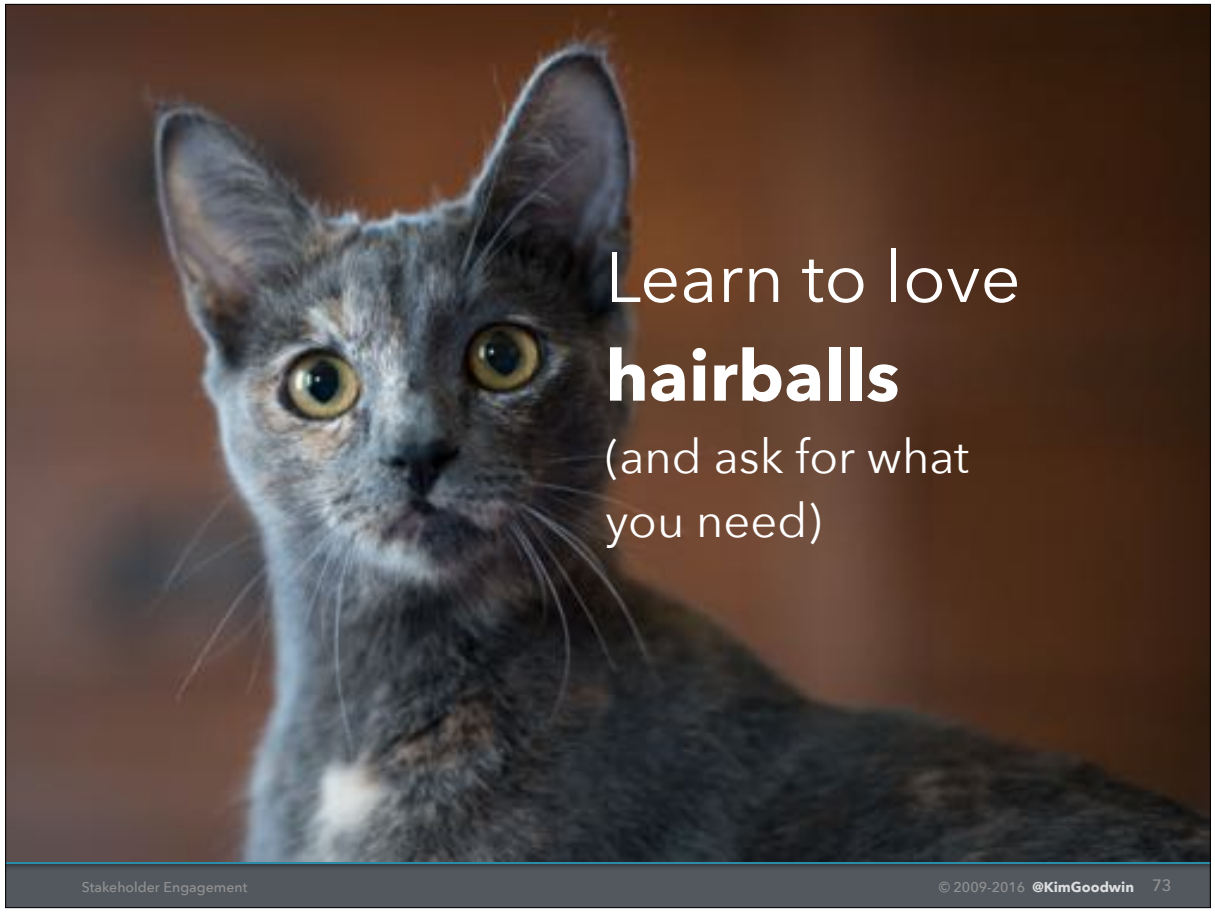

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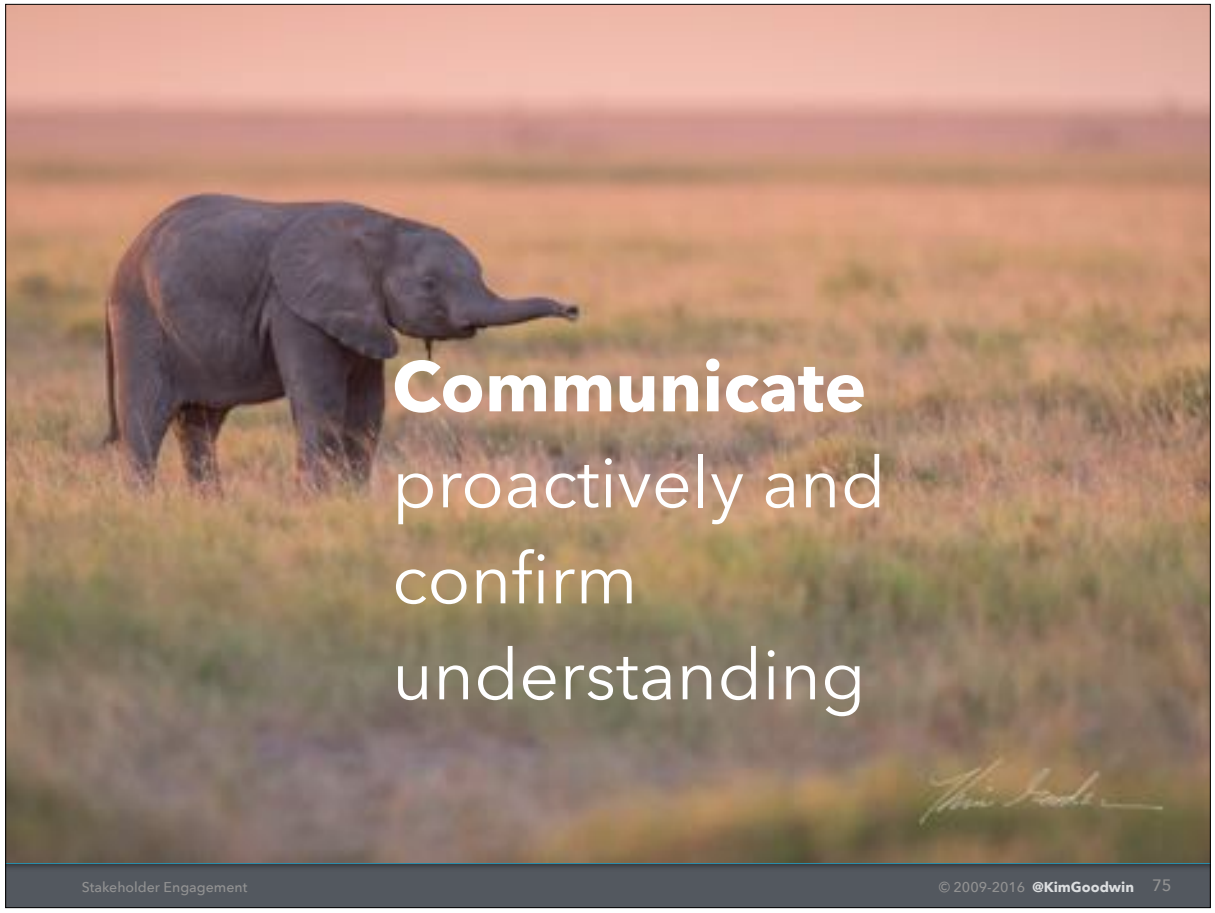

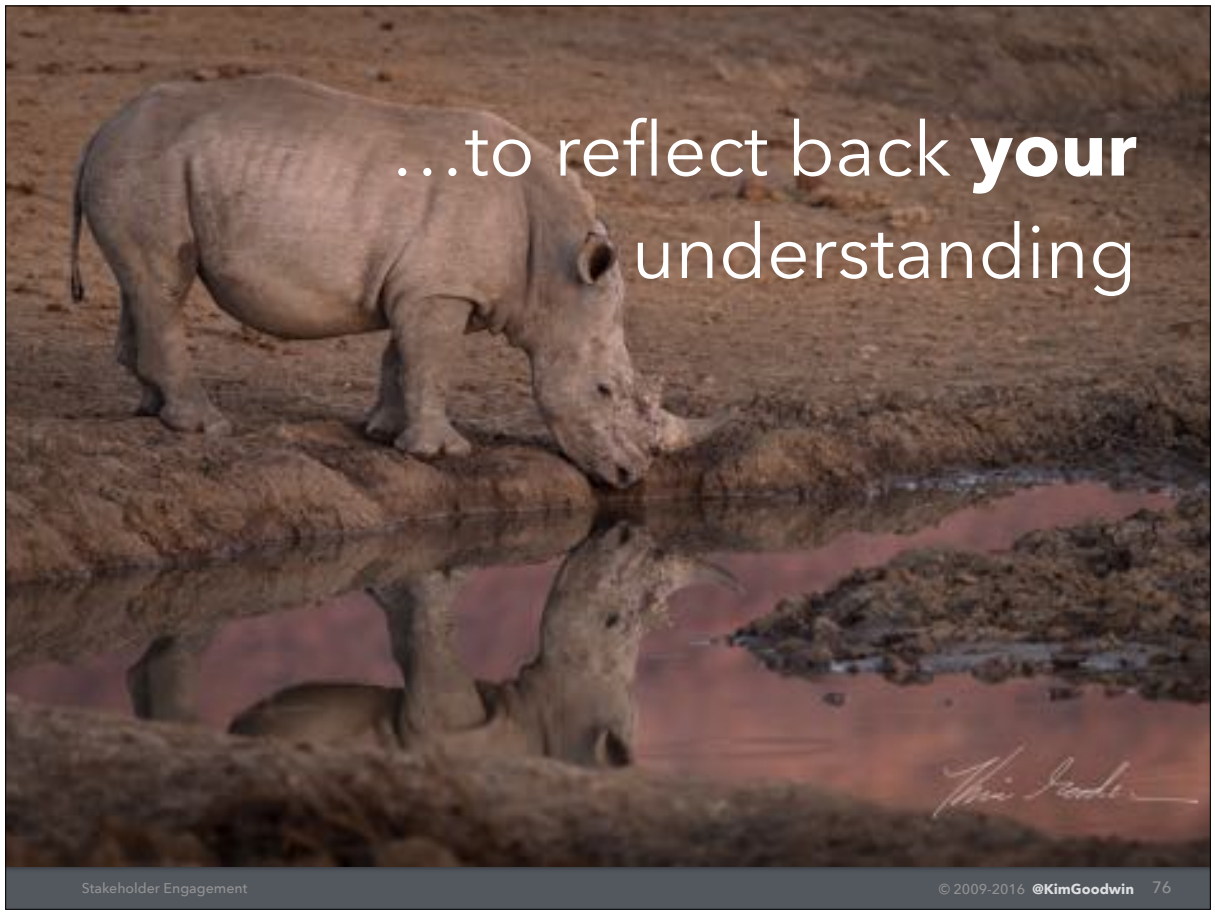

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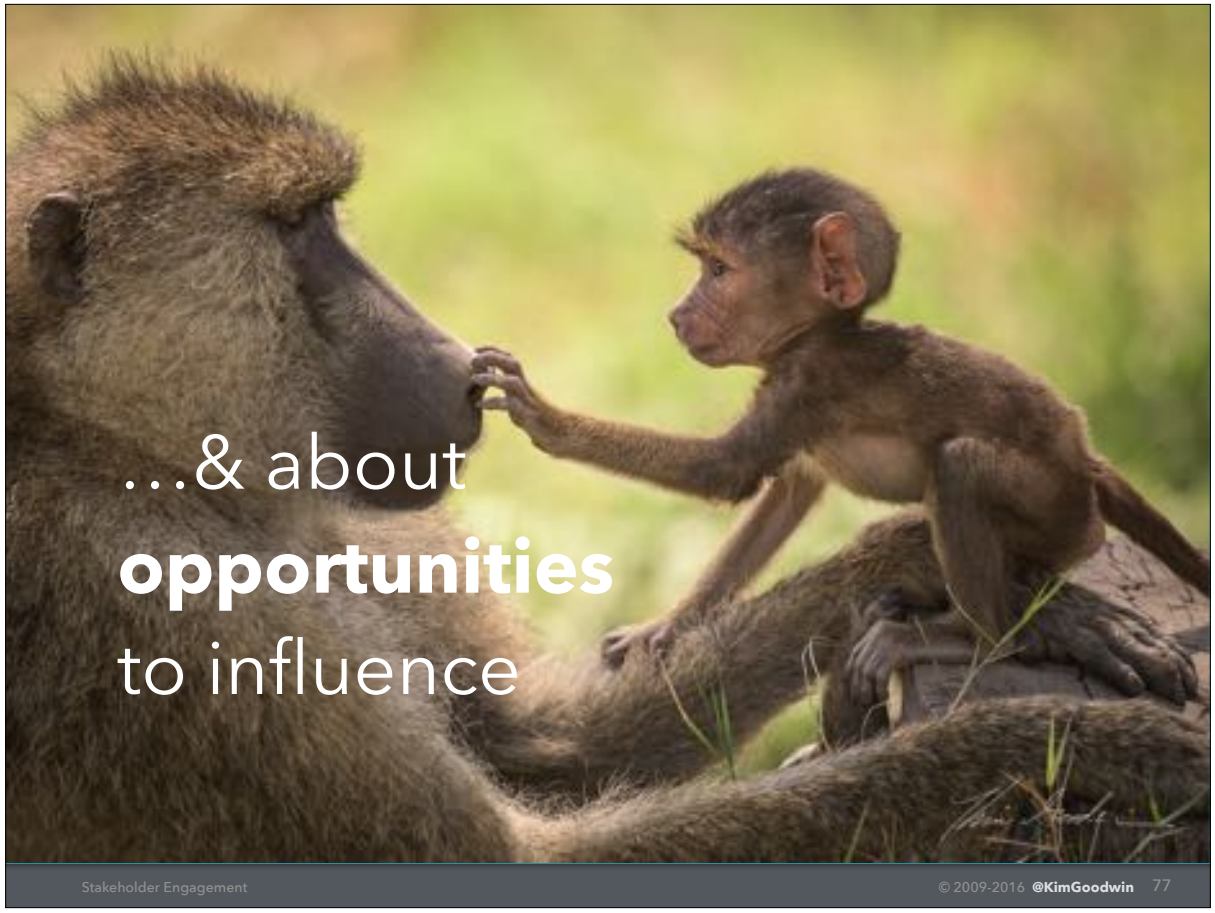

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