Six Steps to Mastering Stakeholder Profiling

Presented by Roxanne Miller

Who is Roxanne Miller?

- Requirements Quest founder
- Requirements Consultant, Trainer, Coach, Mentor
- CBAP®
- Author

Requirements Super Freak
What to Expect

- Establish Terminology
- Identify 6 steps to successful stakeholder profiling
- Explore frequently asked questions

Definition of a Stakeholder

“A stakeholder is a group or individual with a relationship to the change, the need, or the solution.”

- Business Analysis Core Concept Model™ (BACCM™); BABOK® Guide v3

An individual or group that a Requirements Producer (for example, business analyst) is likely to engage with directly or indirectly during the requirements development and management processes.
What is Stakeholder Profiling?

A Business Analysis Planning and Monitoring activity that includes:

✓ the identification of stakeholders who may be affected by a proposed initiative
✓ identifying appropriate stakeholders for the project or project phase
✓ determining the best collaboration and communication approach
✓ Planning for stakeholder risks

Based on BABOK® Guide v3

STAKEHOLDER PROFILING

IDENTIFY PLAN SECURE

PART ONE
IDENTIFY POTENTIAL STAKEHOLDERS

1. Review existing business models
2. Brainstorm ‘Topics of Expertise’
3. List names of potential stakeholders

PART TWO
SECURE THE STAKEHOLDERS

4. Survey each potential stakeholder
5. Analyze the stakeholder surveys
6. Secure the stakeholder resources
Identify Potential Stakeholders; Step 1

Review Existing Business Models
What entities are in the project scope?

- Relationship Map
- Project Charter
- Vision & Scope
- Business Rules
- Process Maps
- And more...

RQ Shopping Cart Project

Requirements Quest Internal Operations

- Fulfillment Department
  - Purchase Orders
  - Product Shipments
- RQ Website
  - Product Purchases
  - Order Delivery
- Accounting Department
  - Sales
  - Payments
  - Online Payment Processor
- Shipping Vendor

Relationship Map

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Identify Potential Stakeholders; Step 2

Brainstorm Topics of Expertise

What expertise is needed?

I need someone who knows ___?

Topics of Expertise

- Topic 1
- Topic 2
- Topic 3

Identify Potential Stakeholders; Step 3

Name Potential Stakeholders

Who might have the expertise?

<table>
<thead>
<tr>
<th>Potential Stakeholders</th>
<th>Topics of Expertise</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joe, Sarah</td>
<td>Topic 1</td>
</tr>
<tr>
<td>Tom, Alice</td>
<td>Topic 2</td>
</tr>
<tr>
<td>Sue, Eric</td>
<td>Topic 3</td>
</tr>
</tbody>
</table>

Topics of Expertise (result of Step 2)
Secure the Stakeholders; Step 4

4

Survey Potential Stakeholders

Who are the experts?

Conduct an interview with each ‘potential’ stakeholder named in Step 3.

<table>
<thead>
<tr>
<th>Topics of Expertise</th>
<th>Little</th>
<th>Some</th>
<th>Proficient</th>
<th>Expert</th>
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</thead>
<tbody>
<tr>
<td>Topic 1</td>
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<td>Topic 3</td>
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</table>

Secure the Stakeholders; Step 5

5

Analyze Stakeholder Surveys

Are there at least 2 experts per topic?

<table>
<thead>
<tr>
<th>Topics of Expertise</th>
<th>Joe</th>
<th>Sarah</th>
<th>Tom</th>
<th>Alice</th>
<th>Sue</th>
<th>Eric</th>
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</tbody>
</table>
Secure Stakeholder Resources
How can we collaborate?

Stakeholder Profiling helps to...

Product Owner
Business Analyst
Stakeholders

STAKEHOLDER PROFILING
Frequently Asked Questions
When do I use stakeholder profiling?

Throughout the life of the project.

When you join the project (at the project start or on-going).

What if a stakeholder over/underrates?

Whether the stakeholder overrates or underrates their level of expertise, it is okay.

2 to 4 persons per topic will balance the contribution.
What if a stakeholder declines?

Determine the **root cause**.

**Collaborate** with sponsor or product owner to work through personality conflicts and resource workload issues.

What if a stakeholder is too busy?

Look for expertise in other stakeholders.

Invite to review requirements that are drafted with less experienced stakeholders.
How do I use it for planning?

Prioritize the topics of expertise. Estimate timing of involvement (when to expect engagement). Estimate level of involvement (how much).

Why should I do stakeholder profiling?

Reduce the risk of missed requirements. Decrease time wasted in meetings. Plan your requirements approach. Demonstrate your value!
What if I want to learn more?

Chapter 2, *The Quest for Software Requirements*

Send an email to inquire@RequirementsQuest.com to receive a free PDF!

How do I ask for more resources?

**Educate** the sponsor, product owner, and stakeholders on the technique.

Share your **plan** for resource utilization.
Stakeholder Profiling can help you to...

- Identify and gain access to the stakeholders you need
- Avoid missed requirements due to overlooked stakeholders or lack of expertise
- Eliminate wasted time in 'all-team' meetings
- Increase buy-in and commitment to the requirements
- Plan requirements development activities to align with resource availability
- Demonstrate your Business Analysis value!

Thank You

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- Connect with Roxanne:
  - @ReqSuperFreak
  - requirementsquest