

CHAPTER 3

Knowing Your Audience

*Seek first to understand, then to be understood.*¹

—Steven R. Covey, American educator, author, and
business leader

Say you have been asked to make a presentation to a group about project management (or any topic on which you have some level of expertise). One of the most critical pieces of information you need in order to prepare your speech is to know your audience—who you are delivering it to. Consider how differently you would deliver your message to a group of 10-year-olds at a school career day; students in a college graduate program; the executive leadership team of your project; or a neighborhood group looking to build a new community center.

No matter what the method of communication—presentation, e-mail, phone call, status report—it’s important to know who will be receiving your message. When you tailor your communication to your audience, they are more likely to understand and respond appropriately. This concept is called *audience design*—altering the way you are delivering your message to suit the communication needs and expectations of those to whom you are communicating. A clear understanding of the audience and what matters to them will result in more effective communication, more active stakeholder engagement, and, ultimately, a more successful project.

The purpose of this chapter is to help you:

- Explore various recommendations for identifying the audience in your project, including their role, their level of power and influence over the project, and their level of support for the project
- See the value of understanding what is important to the members of your audience—the WIIFM (what’s in it for me)

- Become familiar with stakeholder personas as a communication approach
- Put it into practice: Know your audience in traditional, agile, and virtual project teams

Audience = Stakeholders

In a project, the audience is the stakeholders, defined by the *PMBOK® Guide* as “an individual, group, or organization that may affect, be affected by, or perceive itself to be affected by a decision, activity, or outcome of a project, program, or portfolio.”²

Stakeholders have become an increasingly important concept in project management, so much so that Stakeholder Management was separated out into its own knowledge area in the fifth edition of the *PMBOK® Guide* released in 2013. This change was in response to feedback around the need to expand stakeholder management concepts and recognize communications management and stakeholder management as two distinct areas.³ Prior to the fifth edition, concepts around stakeholder management were mainly covered in the Project Communications Management Knowledge Area.

Why is it important to take a thorough look at your project’s stakeholders? Because in many ways, stakeholders *are* the project. The project cannot be completed without those who initiate it, execute it, and live with the results once the project is complete. You can have a project without a charter, or a risk management plan, or a work breakdown structure. But you cannot have a project without stakeholders. Stakeholders can also be the barometer by which project success is measured—stakeholder satisfaction is one of the criteria outlined in the *PMBOK® Guide* for assessing project success. If stakeholders are not satisfied with the project outcomes, it may not matter whether you have fully achieved the project’s objectives. And research shows that consideration for stakeholders only continues to grow within the field of project management.⁴

It’s clear that stakeholders are important. Now, let’s look at how to figure out who they are in your project, and what you need to know about them in order to effectively communicate with them.

Identifying Stakeholders

The Project Stakeholder Management Knowledge Area of the *PMBOK® Guide* outlines a process for determining who is a stakeholder in your project. Many of a project's stakeholders can be discerned by reviewing project documents, including the charter, business case, and agreements. Another tool for identifying stakeholders in a project is expert judgment, which includes seeking input from:

- Those who have a thorough understanding of the organization's functions, culture, and power structures. These people can help identify stakeholders who may have interest in or influence over the project.
- Those with thorough knowledge of the industry, customers, or wider environment. They can help identify stakeholders and stakeholder concerns that derive from the external environment in which the project will exist.

Remember that some stakeholders will be easy to identify, such as the sponsor and the team. It may be more difficult, however, to identify *everyone* who will be impacted by the project. The information presented here is intended to give you a starting point for identifying stakeholders and their characteristics to help you communicate with them more effectively; however, it is not intended to be an exhaustive guide to identifying project stakeholders. Further, your list of stakeholders may change over the course of the project as new stakeholders come to light, or as changes to the project bring changes to your list of stakeholders. The *PMBOK® Guide* recommends reviewing and updating your stakeholder engagement plan routinely, especially as the project moves from one phase to another, and when there are changes in the project's stakeholder community or within the organization.⁵

As you identify your project stakeholders, keep track of them using a tool such as a stakeholder register. You can find a template for a stakeholder register in Table 3.2 later in this chapter. Some of the information you will want to track includes the role(s) the stakeholder plays in the project and the organization; the stakeholder's power and influence; and the stakeholder's level of support for the project.

Roles

Roles include the person or group's position within the organization as well as their relationship to the project. Roles include titles or descriptors like project manager, business partner, sponsor, subject matter expert, business analyst, etc. For example, in a software implementation project, the head of IT in the organization will certainly be a stakeholder, as will any employees expected to use the new software. Roles are an excellent starting point for building your stakeholder register, and for understanding how you can best communicate with each individual or group.

Power and Influence

Two key factors to understand about each of your stakeholder groups are their level of power and their influence. Power is a representation of the stakeholder's level of authority as it relates to the project. For example, a project sponsor has the ability to stop or completely shut down the project, so they have a very high level of power with regard to the project. An end user who will be using the new product or software generated by the project, for example, may have a relatively low level of power.

Influence, which is often related to power, is an indicator of how much the stakeholder can affect others involved with the project. *Who can they influence, and how strongly?* The software's end users may not have a high level of power, but they still have the ability to spread negative views about the project, which can influence others' support for the project, as well as the long-term adoption and integration of the project outcomes into the organization.

One way to categorize stakeholder influence is by defining their "direction" of influence, as shown in Table 3.1.

Table 3.1 Stakeholder direction of influence⁶

Direction of influence	Those influenced (other stakeholder groups)
Upward	Senior management, sponsor, steering committee
Downward	Those working on the project
Outward	Stakeholders outside the project, including vendors, customers, or end users
Sideward	Peers, including other project managers and colleagues who have a similar level of power/influence

Support

Stakeholder support can make or break a project. In the section on planning stakeholder engagement, the *PMBOK® Guide* offers five classifications of stakeholder engagement:

- **Unaware:** Stakeholders who are unaware do not know of the project's existence. They do not have the basic knowledge required to move to a different classification of engagement.
- **Resistant:** Resistant stakeholders know about the project but do not support it. They may actively work to stop the project in whole or in part.
- **Neutral:** Stakeholders who are neutral do not act in ways that either promote or detract from the project. Often these stakeholders are not highly impacted by the project.
- **Supportive:** Supportive stakeholders take steps to support the project in words and/or actions.
- **Leading:** These stakeholders take a leadership role in ensuring the project succeeds.⁷

One way to look at these classifications is on a spectrum, as shown in Figure 3.1. Keep in mind that stakeholders can move in either direction on this spectrum. A resistant stakeholder can move toward being more supportive; likewise a supportive stakeholder can move toward being resistant. Communication (or lack thereof) is a powerful tool in moving stakeholders along the spectrum.

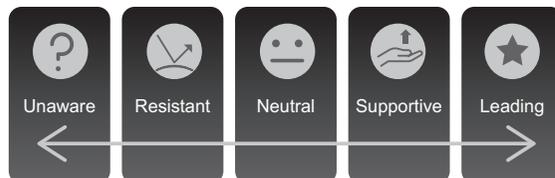


Figure 3.1 *The spectrum of stakeholder engagement*

In your stakeholder engagement planning, you should attempt to identify where each of your stakeholders are on this spectrum, and where they need to be in order for the project to progress smoothly and achieve

its goals. Why is this important? Because knowing where your stakeholders sit on this spectrum can help you and the project team develop and implement communication strategies that align with stakeholders' expectations and interests.

A good stakeholder engagement plan starts with identifying who your stakeholders are, their role, power and influence in the project, and their current and desired levels of support for the project. The next step is understanding how to engage your stakeholders in order to keep them informed and move them toward the level of support needed for the project to succeed.

What's in It for Me?

Identifying the project stakeholders and their relationship to the project is the first step. To be able to communicate with them most effectively, you must understand what these stakeholders care about. In other words, what are their *stakes* in your project?

Frequently referred to as “what’s in it for me” or WIIFM, this concept is basic but powerful. Simply put, people respond better and engage more when you talk about what matters to them. This is especially true when you want them to take action, or when you’re asking them to support changes that disrupt their “business as usual.” The WIIFM is the value proposition of the project for each stakeholder or group.

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After all, “just as the stakeholders may affect the project, the project affects stakeholders.”⁸ Stakeholders want to know how the project will impact them, when it will happen, and what kind of support they will receive in adjusting to the changes the project brings. A project team member might care most about what will be expected of them and who they will be working with. The project sponsor might want to know about factors that impact whether the project will deliver its intended results, and the project’s priority within the organization.

All of these elements are—you guessed it!—uncertainties. How will the project affect them? What are the expectations for them, both during the project and once it has been completed? Is there anything about the project that might negatively impact them? The more you can learn about what kind of impact the project will or could have on your different stakeholder groups, the better you can communicate to reduce their uncertainty about it, and increase their support for it.

Finding the WIIFM

When it comes to project stakeholders, how do you know what matters to them? What are they uncertain about? A good place to start is to simply put yourself in their shoes. Take your list of stakeholders and imagine how you would feel as a team member, a sponsor, a subject matter expert, a functional manager, end user, etc. What would be most important to you? Would you be concerned that the project could affect your status in the organization, either positively or negatively, or the way you do your work? If you are a functional manager, you might be concerned with whether your employee's time on the project will impact his or her regular duties. If you are the IT department head during a software implementation, you may have a number of concerns, ranging from compatibility with other company software, to resource allocation, to responsibility for training and supporting the new software once the implementation is complete.

Some of these considerations will be easy to discern on your own. But others may be less obvious. An executive sponsor may have recently had a bad experience with another project exceeding its deadline, so he is skeptical of whether this project will be delivered on time. A functional manager may have staff working on several other projects in addition to this one, so she may be resistant to the idea of one more project taking up her staff's time.

The *PMBOK® Guide's* process of identifying stakeholders includes methods to collect additional data about stakeholders and their interests, such as surveys and brainstorming meetings with the project team. If you're using expert judgment, as previously noted, this can also be a

valuable tool for identifying not only who your stakeholders are, but what their concerns are about the project.

Meetings are another technique that can be useful with a wide range of stakeholder types and groups, especially when done early on in the project. In fact, face-to-face or virtual meetings can be invaluable in understanding stakeholder concerns because you will be able to learn from nonverbal communication as well (see Chapter 4). These meetings can also bring to the surface concerns or even identify new stakeholder groups that the project team may have missed.

When talking with stakeholders to understand their interests in the project, ask basic questions like:

- On a scale of 1 to 10 (where 1 is extremely low and 10 is extremely high), how impactful is this project on your day-to-day work?
- What do you see as the biggest benefit of this project?
- Is there anything about this project that worries you?
- Are there aspects of this project that conflict with your other priorities?

Don't debate the feedback you receive. The goal of these conversations isn't to win anyone over; it is simply to develop a fuller understanding of their concerns about the project, and to show stakeholders that you are motivated to understand and address these concerns. Keep in mind, however, that if you take the time—both yours and the stakeholders'—to learn about their concerns, you will need to ensure that what you learn is somehow addressed within your project plan and project communications. Learning their concerns is a great way to build trust, but doing nothing with that information is a sure way to lose it.

Add all of the data you collect to your stakeholder register. It should have a robust and nuanced "WIIFM" field for every stakeholder group that covers everything you have learned in your identification of stakeholders. Table 3.2 shows a stakeholder register template that includes the stakeholders you have identified, their role, power, influence, level of support, and their WIIFM. You can modify this template to add other factors that can help characterize and understand your stakeholders based on the unique elements of each particular project. When crafting your messaging

Table 3.2 Stakeholder register template

Stakeholder	Role	Power	Influence	Support	WIIFM
Stakeholder 1					
Stakeholder 2					
Stakeholder 3					

to stakeholders, incorporate these considerations into *what* you say and *how* you say it. Your communications will be more effective when your stakeholders see that you know, understand, and address their concerns.

Segmentation and Personas

Audience segmentation is a marketing concept where customers are divided into groups based on similar demographics, needs, preferences, and buying potential, similar to the process of analyzing stakeholders and grouping them based on similar characteristics. In marketing, this plays out in how and where products are advertised to maximize resources. For example:

- A technology company releasing a new, cutting-edge gadget might advertise through websites or magazines that specifically target early technology adopters.
- A company that sells soft drinks might want to target many different markets, but they customize their messaging to different groups and deliver that messaging through channels targeting those groups.
 - One advertisement showing younger people drinking the product while having fun by a swimming pool might be advertised during television shows favored by this group.
 - Meanwhile, a separate advertisement depicting multiple generations of a family drinking the beverage around the dinner table might be shown during family-oriented television programming.

It's a way of meeting the customer where they are and showing them what's in it for them.

While the concept of segmentation has been around for quite some time, a more recent development is the use of customer personas when targeting audience segments. This idea first originated within software

design to represent archetypal users of the software or system, and was quickly adopted by the marketing field to inform how messages should be tailored to customer segments. A persona is a single fictional character that represents the synthesis of all of the relevant characteristics of those who make up a customer (or stakeholder) segment.

Personas may be a useful approach to help you craft your messaging for some of your stakeholder groups, especially in larger projects where stakeholder segments might include a large number of people. With large stakeholder groups it may be difficult to keep all of their concerns organized. A persona allows you to capture all of the characteristics of each group so that you can craft and deliver your messages most effectively.

Personas are usually drafted as a character sketch of one to two pages. Table 3.3 contains a template for helping you create stakeholder personas, along with questions to consider.

Table 3.3 Stakeholder persona template

Stakeholder name:		
Characteristics	Organizational role Role within the project Reporting structure	<ul style="list-style-type: none"> • What are the organizational characteristics of the group, which may include their role/position, their relationship to the project in terms of power and influence, reporting structures, etc.? • What characteristics have already been identified in the stakeholder analysis?
Support	Current level of support Desired level of support	<ul style="list-style-type: none"> • What is their current level of support for the project—unaware, resistant, neutral, supportive, or leading? • What is their desired level of support for project success?
Motivations	Top organizational priorities WIIFM Positive impacts of the project	<ul style="list-style-type: none"> • What is this group's top priorities, interests, and goals? How does the project fit into that? • What is their "WIIFM" in relation to this project? • In what ways might the project positively affect them?

Barriers	Uncertainties Negative impacts of the project	<ul style="list-style-type: none"> • What are their uncertainties about the project? • Are there ways in which the project might negatively impact them (whether real or perceived)? • What other factors might negatively affect their support for the project?
Communication Preferences	Project communication needs Current communication methods	<ul style="list-style-type: none"> • What are the most important factors about the project that this group needs to be informed of, and when? • What current communication methods does this group already use, that can be employed to deliver communications about the project?

Give the persona a name. This can be an actual person's name, such as John Brown, or a categorical name, such as end users. Personal names may help keep a more "human" perspective of the stakeholder group by reminding the project team that the persona represents real people who are affected by the project and need to be communicated with.

Incorporate your personas into your project communications management plan (see Chapter 5). When crafting and delivering your messages, these personas can help ensure that you are telling the right stakeholders the right information, the right way, at the right time.

Putting It into Practice

Here are a few practical tips, fun activities, and useful ideas for how you can implement the concepts in this chapter into your project environment. Note that ideas listed in one type of team may be adapted to other teams. Be creative. Use these as a starting point. Add your own ideas to build your communications toolkit.

Knowing your audience	
Traditional project teams	<ul style="list-style-type: none"> • Encourage team members to meet in a less formal setting (e.g., coffee, tea, or lunch) to get to know one another and to learn from each other. • As the project manager, interview each team member prior to the start of the project to get to know them. • For each key stakeholder group, assign specific team members to research their background (company annual report, website, executive team, what they do, business core values, etc.) and give a presentation to the rest of the team. Post the presentation on the project website for ease of reference.
Agile project teams	<ul style="list-style-type: none"> • Invite stakeholders to a stand-up meeting to demonstrate how the team operates. • Revisit your stakeholder analysis at the beginning of each sprint. As the project iterates and evolves, additional stakeholder groups may need to be incorporated into your project and project communications management plans. • Try creating personas for a few of your large stakeholder groups using the template in Table 3.3. Ask the entire team to contribute to this exercise, so that they are engaged in the process and more likely to consider how these personas are affected by the project and what their communication needs will be.
Virtual project teams	<ul style="list-style-type: none"> • Post a map on a “virtual wall” and have each team member pinpoint their location and share a photo of their home or work environment. • Consider using an icebreaker (e.g., What is your favorite television show, or What is your hobby?) at the start of virtual team meetings to encourage team members to get to know one another. • As a team, discuss where each of your stakeholders fall on the engagement spectrum: unaware, resistant, neutral, supportive, or leading. Create a visual representation of your findings and post it on your virtual team wall for easy reference.

Summary

Every stakeholder is a member of your audience. When communicating, it is critical to know your audience. It is also important to know how several factors about your audience can impact their engagement with your communications—and your project!

Communication strategies may need to be adjusted based on stakeholders' roles (their position in the organization and functional relationship to the project), power (their level of authority as it relates to the project), and influence (how much the stakeholder can affect others involved in the project or the organization). There are five categories of stakeholder engagement: unaware, resistant, neutral, supportive, and leading. Knowing where your stakeholders are on this spectrum can help you and the project team develop and implement communication strategies that align with stakeholder expectations and interests.

Understanding what stakeholders care about starts with WIIFM, or “what’s in it for me.” The WIIFM is the value proposition of the project for each stakeholder or group. When working with a large group of stakeholders, consider developing stakeholder personas to capture all of a stakeholder group’s characteristics and concerns. This can help you craft and deliver your message most effectively to stakeholder groups that contain a large number of people.

Identifying your audience, understanding what their stakes are in the project, and considering the factors that can influence how they receive and perceive communication can help make your project communications much more effective. The end result: decreased uncertainty, increased trust, and improved chances for project success!

Key Questions

1. Describe your experience in communicating with stakeholders. What situations have been the most successful and/or the most challenging? What advice would you give to new project managers in communicating with stakeholders?
2. Using the five classifications of stakeholder engagement, what communication strategies would you use to move a stakeholder from a position of resisting your project to a more supportive role?
3. Working with your project team, develop stakeholder personas using the template provided. What categories or questions would you add? What value do you see in using stakeholder personas?

Notes

1. Covey, accessed September 23, 2019, <https://www.franklincovey.com/the-7-habits/habit-5.html>.
2. Project Management Institute (2017), *PMBOK® Guide* 6th ed., p. 723.
3. Project Management Institute (2013), *PMBOK® Guide* 5th ed., p. 469.
4. Littau et al. (2010), p. 17.
5. Project Management Institute (2017), *PMBOK® Guide* 6th ed., p. 505.
6. Project Management Institute (2017), *PMBOK® Guide* 6th ed., p. 513.
7. Project Management Institute (2017), *PMBOK® Guide* 6th ed., p. 521.
8. Huemann et al. (2016), p. 43.

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