The Relationship Map

Watch the video that explains the why, how and what of Relationship Mapping. Then check back to this document to get the details, all the suggestions and questions. Use this document as a guide when you start mapping… or ignore the video and read about it here. What ever suits your learning style best.

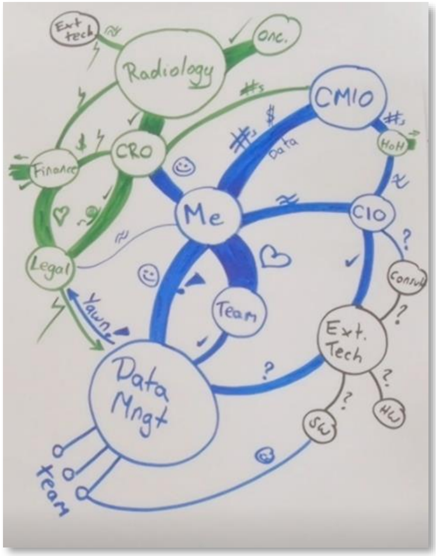
What is the Relationship Map?

The Relationship Map is a process & tool used to understand complex human relationships in business. It helps by visualizing informal & formal networks that are essential for everything we do.

Why use it?

The Relationship Map will improve your understanding of these networks and help you control and improve them. As you work through the mapping process you will be challenged! You will uncover what you know & don't know about a network, your blind spots and assumptions. The map will quickly show you where the network's strengths and weaknesses are and help you decide what needs to be done to ensure success.

The mapping process can be used in many different situations.



1. A complete Relationship Map

For example…

- A Team Leader could use the map to better understand which relationships her team needs to be more successful. The map will help her compare the strengths and weaknesses of her team's current relationships to an ideal future, decide on what needs to be done to get there and who, in the team, is responsible for which strategic relationships.
- The map could help a Project Manager identifying bottle necks that slow his project, who is responsible for the slow down and what needs to be done to remove the barrier.
- A Key Account Manager could use the map to ensure all stakeholders, both internal and external, are covered and receive the correct information at the correct time. She may also choose to map the competition's relationships in her account to better counteract them.

Tom Venning
☏ +43 676 549 3244
✉ tomvenning@outlook.com

How do you use it?

There are five steps in the Relationship Mapping process. Working through all steps will take about 1 hour.

1. Goal
What do you want to achieve by working through the mapping process?

2. Stakeholders
Write a list of ALL stakeholders in the network (team, project, account, etc.)

3. Draw map
Draw the map using the mapping guidelines.

4. Get help
Get someone to challenge you by asking lots of questions & help you develop an action plan.

5. Action
Do what ever you have committed to doing.

1. Goal

This takes less than 2 mins

1. What kind of relationships would you like to better understand?
2. What is the goal of using the relationship map?

Answering these two questions defines the entire activity. If you are working by yourself then it's enough to think about the answers. If you are working with a group of people its worthwhile writing the answer for all to see and to remind participants who drift off course.

2. Stakeholders

This takes about 10 mins

- Write a list of everyone involved in the project
- Choose the 10 to 15 most important stakeholders on the list.

Write a list of everybody involved in the network. Its okay to group people into teams, departments or entire organizations, the main thing is to be sure you miss no one, no matter how distant from the project. Why?

For example … A salesperson was trying to build a relationship with an important Doctor in a large hospital. The problem was she found it extremely difficult to find him. No one seemed to know where he was, unless he was somewhere she was not allowed to go, such as the operating theatre or on a patient visit. Her list of stakeholders didn't help much until a colleague noticed that hospital security was missing from her list, and her attention. During her next visits she spent more time chatting with the bored security guard… it turns out he noticed many things other people missed… after all that's his job. He often knew where the doctor was, who the doctor deliberately avoided, who else wanted to get the doctor's attention and who succeeded. You never know how important even the least important stakeholder may be.

Its better to strike stakeholders off your list, rather than miss someone important. The following list of questions and comments will help you brainstorm … I've used the word 'project' throughout the list, feel free to change it to what ever makes sense i.e. team, account, customer, community etc.

- Who is working on the project?
- Who needs to deliver information and / or results for the project to be successful?
- Who is impacted by the project, both directly and indirectly?
- Who owns or controls resources?
- Who needs resources? Who provides or controls those resources?
- Who will benefit as a result of the project?
- Who will lose as a result of the project?
- Who needs to make decisions to enable the project?

Tom Venning
+43 676 549 3244
tomvenning@outlook.com

- Who has power and / or influence over the project? Power is the person's hierarchical position, Influence measures who and how many people listen to them. Power does not mean that someone is influential. We all know senior managers who employees avoid.

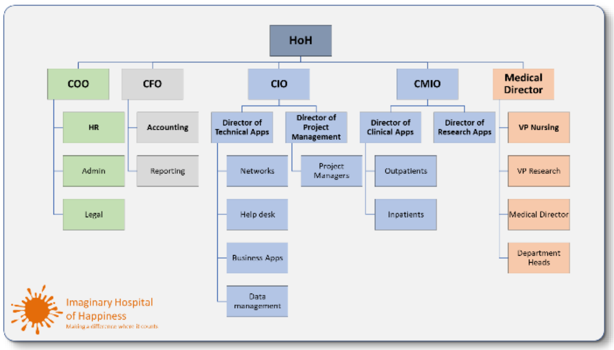
Secondary stakeholders - Imagine a stone dropping into still, glassy water and the ripples moving outwards… Networks work in the same way. Brainstorm the secondary and further networks. This is important as often the cause of a problem may be further away than you suspect.

For example… A company struggles with delivering orders on time. The problem starts in Production who are producing the right things at the wrong time. They say that better forecasting would help which means Sales needs to deliver more accurate predictions. Sales is dependent on their Distributer Network for this information, who are dependent on their Customers, who need information from Users about potential breakages, replacements, expansions etc. If you want to address Production's forecasting problems then you need to dig deep and influence a wide network Sales, Distributers, Customers and Users.

Look at your list of stakeholders and …
- Who their bosses, peers and reports?
- For people to do what you need, who are they dependent on?
- What is the resource chain? Where do resources come from, where do resources go to?
- Where do people get their information, opinions and attitudes?
- What is competition up to? Who do they influence?
- Who is 'external'? The army of consultants, advisors, influencers, etc. who swim in the sea of big projects?

Go crazy… this is a brainstorming… Do not evaluate ideas yet. Don't start discussing stakeholders immediately, there is plenty of time for that later. Don't discuss if the person or group is a stakeholder or not… It's a brainstorming. Write the list and discuss it later.

It may be helpful to use an organisation chart, a process description where you can connect different actions to people or a stakeholder analysis. I go into detail about the stakeholder analysis in a separate document.



Stakeholder Analysis

	Position	Name	Interest	Project Impact H/ M / L	Opinion H/ M / L	Support	Competency
4	Head of Clincial Applications		Prestige	M	L	No	Leadership
5	App development team	Jane	Job	H	H	inc	Data
6	App development team	Ahmed	Job	H	M	inc	Data
7	App development team	Wilson	Learning	H	M	inc	AI
8	App development team	Dunya	Passion	M	L	inc	AI
9	App development team	Akina	Data	H	H	inc	User Interface
10	Head of hospital - HoH		Research	L	L	Little	Overview
11	Chief Operating Officer		None	L	L		
12	VP Nursing		None	L	L		
13	Research Coordinator – CRC		Involved	H	H		
14	CMIO – Chief Medical Information Officer						
15	CIO - Chief Inforamtion Officer						
16	Director of Technical Apps						
17	Support						
18	Networks						
19	Security						
20	Project Management						
21	Director of Clinical Apps - App product owners, PMs, Outpatients, inpatients, data						
22	App Product Owners						
23	Outpatients						

At the end of the process **choose the 10 to 15 most important stakeholders relevant to your goal**. If you choose less than 10 then the relationship map is probably the wrong tool… its too powerful. If you choose more than 15 the map will be a mess and it will be difficult to understand.

Tom Venning
+43 676 549 3244
tomvenning@outlook.com

3. Draw map

This takes about 15 mins

Now the fun starts! Its drawing time. You will need a piece of paper (A4, Flipchart, etc.) and coloured pens & crayons. Choose a size relevant to how many people you are working with. When you draw use the following guidelines.

From whose point-of-view are you drawing?

This will effect the output of the map because you are working with opinions… soft information. **For example…** if you are a KAM[1] and you draw the map from your point-of-view you will mainly see stakeholders in the customer and in your own company. If you are a KAM drawing from the customer's point-of-view you will see many more stakeholders in the customers organisation and your competitors.

The bubble size represents how important someone is for the project.

Big bubbles mean the person is very important. Small bubbles mean the person, or group, is less important. If the person or group is not important at all then they should not be on the map.

The line thickness represents how intense the relationship is.

Thick lines mean the relationship is intense. Thin lines mean the relationship is weak. Don't put all relationships on the map, its too complicated. Focus on the most important strategically important relationships.

What criteria you used to measure importance and intensity?

What KPI's[2] do you use when assigning importance and intensity? What makes someone important for your success? What makes a relationship intense or not? Is it that you see the person daily and constantly exchange important ideas, or do you see the person once a month for a critical update meeting? You will find this changes for each person and relationship. The KPI gives you important information about why the person is relevant for your success and the single most important thing you need to focus on for success. Later in the mapping process you may choose to use the KPI to establish your relationship targets. **For example…** if a Project Manager is working with the map then a resource owner's importance is linked to how important the resource is for the project's success. A team member's importance will be assigned according to what tasks the person needs to perform and a user's importance will be measured according to the quality of the feedback they give.

Add symbols and additional information.

Choose any symbol that tells a story about the relationship. Typical symbols are 👍 ☠ 💣 ☺ ⌛ ✓✗. Think about which way arrows point… are relationships one way (a manager gives orders but never listens to feedback) or two way? Attach any relevant information to bubbles and lines as needed. What information you choose is dependent on what you are trying to understand i.e.

- Name – The customer's real name
- Position – Their formal job title

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[1] KAM – Key Account Manager in sales

[2] KPI – Key Performance Indicator

- Responsibility – Within their job they will be responsible for different tasks i.e. Hiring, Overview committees, financial budgets, resource allocation, decision making etc.
- Role – In the sale or project what is their role? KOL[3], decision maker, approver, influencer, user, gate keeper…
- Influence – How important are they in influencing the decisions and information flow?
- Probability – How likely is it that they will support you?
- Urgency – How important is it for them to decide? Is it urgent or not?
- Opinion – What is their opinion about you, your company and your offering?
- Professional Targets – What are their KPIs?
- Professional Goals – What do they want to do with their career?
- Personal Goals – What do they want to achieve outside of work?
- Personal Interests – What topics excite them?
- Decision criteria – When making a decision… on what criteria is it based? Cost, efficacy, safety, personal gain etc.
- Likes – What do they like about you and your offering?
- Objections – Which points cause them concern, are a risk, are they likely to object about?
- Attitude to new technology – Are they an early adopter, a follower or a laggard?
- Character profile – What else makes them tick?

Keep a list of things you don't know or assume.

One of the main benefits, and weaknesses, of the Relationship Map is that, while drawing and talking about it, you quickly uncover what you don't know, your blind spots and what you assume. Knowing what you don't know is essential for success. At the end of the mapping process the list of don't knows, blind spots and assumptions feeds into your action plan… go out and find it out!

Why is this a weakness? For two reasons … firstly the map only shows your opinion and is only as strong as your power of self-reflection. If you are blinded by your over proportionally large ego, then the activity will only reinforce your opinions. Normally this guarantees failure. Secondly, some people get little value from mapping because it shows what they already know. Typically, this happens when the network that is being mapped is simple, small and predictable or the person doing the mapping has a complete and deep understanding of the problem.

[3] KOL – Key Opinion Leader

Tom Venning
☏ +43 676 549 3244
✉ tomvenning@outlook.com

4. Get help

This takes about 20 mins

You get tremendous value by sharing the map with other people and asking them to challenge your view. This comes in two different ways… gathering opinions and receiving coaching.

Gathering opinions… share the map.

Firstly… you can show the map to stakeholders who appear on the map. The goal is to gather their opinion and uncover what you don't know. This highlights differences in opinion which may otherwise stay hidden and damage your chances of success. Very often the stakeholder will begin correcting the map from their point-of-view, which gives you very valuable information. **For example…** A senior manager from the customer was invited to a project team meeting and shown the relationship map. After taking a minute to understand it the manager began to speak openly about relationships inside her company, about strength, weaknesses, political battles, competencies etc. All these things impact the project's success, which is the manager's success. The team spent an hour questioning the manager and developing a joint action plan to address the most important issues. If they had not shared the map, they would only have discovered these things when the created problems in the project.

A word of caution! The map can damage delicate, or over inflated egos! Some stakeholders may object about their bubble size, "You gave me a small bubble! Are you saying I am not VERY IMPORTANT!!!" The map can also be brutally truthful and highlight serious problems. If this situation is not handled carefully then it may start the blame game, denial, surrender, or shoot the messenger (the person who drew the map). Over all it's very valuable to share the map, be sure to choose who you share it with carefully and plan carefully what to do if things go wrong.

Get coached to deepen your understanding of the map.

The map shows your opinion. It does not show reality. Its very valuable to get coaching. Ask a peer, or manager to **challenge you by asking lots of open questions** and to help you develop an **action plan**. Following is a list of areas the person may choose to help you develop…

- Time – From past to future … what caused things, describe the present situation, what relationship milestones need to be developed, what are the relationship targets, what is your vision?
- Relationship targets – Its worthwhile to set targets for the relationships you want to develop. These can be both hard and / or soft targets i.e. Decrease the amount of time it takes to get information / resources / decisions etc. Increase the quality of information delivered. Decrease the number and size of conflicts between two people. Meet more often. Get more personal. Increase informal chat time. Avoid the stakeholder for all major decisions. Etc.
- Why do you think the way you do? What evidence do you have?
- How does it impact success?
- What are the strengths and weaknesses?
- What can you do about it?
- Who else needs to do something?
- What resources do you need to shape the relationships?
- What competencies need developing to ensure relationship success?
- Lots and lots of simple open questions work best.
- Ask detailed questions to dig deeper and challenge blind spots and assumptions.

Tom Venning
☏ +43 676 549 3244
tomvenning@outlook.com

5. Action

This takes as long as it takes

Now its time to do whatever you committed to while working through the Relationship Mapping process. Good Luck!

How can I start using the Relationship Map?

I suggest start by yourself, draw up a map and ask a colleague to coach you. Once you've done it yourself, and understood how it works then use as a coaching tool for someone else… your learning partner, someone in your team, a peer who needs help. Once you are comfortable with that, you can move onto running team mapping meetings where everyone works on the same large map.

If you work with a team then start with a large piece of paper, or a white board. Use post it notes to brainstorm the stakeholders and use them again to position people on the map. Post-its are flexible and easy to use.

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