



# Introduction to HR Stakeholders' Management

A FIELD BOOK

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# INTRODUCTION TO HR STAKEHOLDERS' MANAGEMENT: A FIELD BOOK\*

This field book aims to help HR practitioners:

01

Explain the importance of stakeholder management in project success.

02

Map stakeholders based on their level of influence and interest.

03

Develop strategies for effective communication and engagement with stakeholders.

This fieldbook is Chapter 1 of the field book, “Managing and Influencing HR Stakeholders” to be released later this year.

# INTRODUCTION

Human resource management professionals enter the profession with so much enthusiasm. As they climb up the ladder, however, they realize that getting things done is a lot more challenging than what they have imagined.

A new performance management system being introduced is questioned by a different set of people from those who complained about the current system. A new incentive scheme designed to address concerns about the current one receive more questions and protests. I remember a Human Resource Manager who introduced a new job leveling system. Workers started a picket in front of the company against the new system calling her all sorts of unsavory names. I know another company that conducted four job evaluations by different consultants in eight years. None of the results got implemented due to opposition from various quarters.

How about the wellness program that HR practitioners were so excited about but was joined by less than 5% of the more than a thousand employees?

Human resource professionals realize that getting the support of management is just one step in the process of initiating change. That authority from management does not hand them in a silver platter the capability to change things as they have initially planned it. They immediately see the need to get the support, if not approval, of many other individuals or groups whose varying interests could derail their project.

Thus, when one of my clients asked me to run a workshop on Managing and Influencing HR Stakeholders, I felt i had so much to share. I had more than 30 years of experience as an HR practitioner in public and private companies and conglomerates big and small, across different industries. I have ran HR workshops in Singapore, Indonesia, Thailand, Malaysia, Hong Kong, India, and the Philippines.

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# INTRODUCTION

The workshop was only for two-days but the workbook I prepared soon grew to almost a hundred pages. I told myself: why don't I just turn it into a field book that other HR practitioners can benefit from?

A field book is usually understood as the notebook brought by scientists to record their discoveries in the field. In this case, however, I encourage readers to jot down their own notes as I share my own notes that could somehow instruct younger HR practitioners on how to navigate corporate politics to get things done.

The field book entitled *Managing and Influencing HR Stakeholders* soon grew into more than 150 pages. My daughter advised me to break it down to make it more readable. Thus, I am giving away this Chapter 1, *Introduction to HR Stakeholders' Management*. This is in not in anyway complete. I am sure that readers will have a lot more stories and lessons to share. But I could add them in the complete edition of this field book.

In the meantime, dear HR readers, please email me at [bobby.galvez@changementor.com.mx](mailto:bobby.galvez@changementor.com.mx) on how it has helped you and/or share your own stories on how you managed or influenced your HR stakeholders.

So here it is, dear HR friends, your free field book on the rudiments of HR stakeholders' management.

**LET'S DO IT!**

A handwritten signature in black ink that reads "Bobby Galvez". The signature is written in a cursive, flowing style.

# HOW TO USE THIS FIELD BOOK

This field book was written with HR practitioners in mind as its users. However, the principles can still be used by any individual who needs to work with various stakeholders.

You can read this as a regular ebook. You can maximize your learning, however, by using it as field book.

As a field book, this was written in question-and-answer form to make it easier to use instead of being expository.

I have included forms to fill-up, questions to reflect on, and exercises to do. Although you can choose to answer them in you head, writing them down will allow you to fully reflect on them which will trigger more of your own questions. There is plenty of blank space for you to write on.

Writing those notes, answers and reflections will also aid in retaining what you have just read and thus improve the learning process.

This edition is only Chapter 1 of the whole Field Book on Managing and Influencing HR stakeholders. In the next chapters, for example, I will explain the importance of network building as well as applying empathy to individuals and groups in your organization.

I don't expect anyone to read this fieldbook in one sitting. Thus I suggest to immediately practice the ideas you picked up so that you can explore what could be a better way to apply them the next time.

Let me know how it works out. And wait for the release of the next chapters on Managing and Influencing Your HR Stakeholders.

Cheers!



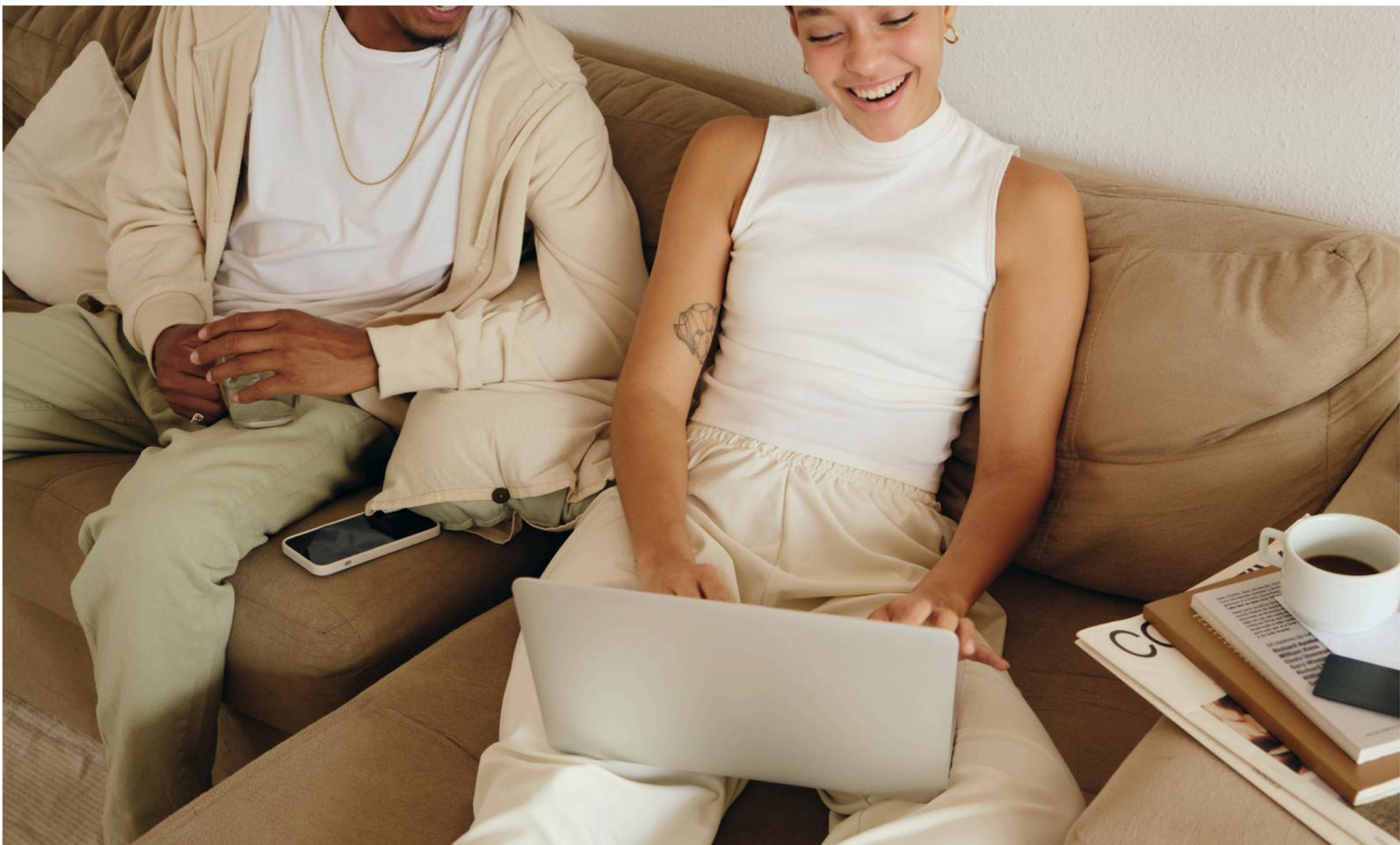
# ACKNOWLEDGEMENT

This field book was based on a workbook for a workshop requested by Theresa Pingkian, a Senior Director in a global healthcare company among the top 15 of the Fortune 500 companies.

Working in a global corporation, her team needed to work with stakeholders not only within the country but also across countries and differing cultures. As a very experienced HR leader, she needed a quick way to share with her team her own lessons through the years.

My biggest thanks to Thesz for her trust and confidence and to one of the most dynamic and active workshop participants I had. Your insights provided me a lot of additional perspectives on the subject.

Maraming Salamat!



# Experiences in Past Engagements with Stakeholders

Answer the following questions based on your own experiences. Ponder on your reflections when we discuss the strategies on managing stakeholders at the latter part of the fieldbook.

01

What was your most satisfying project engagement in working with stakeholders?

02

What were three things that you did which helped in making that engagement satisfying?

03

What was your least satisfying project engagement in working with stakeholders?

04

Looking back, what were three things that you think you should have done to make the project engagement more satisfying?

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# WHAT IS STAKEHOLDER MANAGEMENT?

Stakeholder management is the process by which you organize, monitor and improve your relationships with your stakeholders. It involves systematically identifying stakeholders; analyzing their needs and expectations; and planning and implementing various tasks to engage with them.



Adapted with modifications from PMBOK\*



## Who are your Stakeholders?

Stakeholders are individuals, groups, or organizations that have an interest in, are affected by, or can influence a particular project, organization, or decision

Their level of interest, influence, and impact can vary significantly, but they all share a vested interest in the success or failure of the organization or project. This "stake" could be financial, emotional, social, or professional.

Stakeholders who see the benefit from the project will be supportive and positive about it. Conversely, those who perceive it as having a negative outcome for them may seek to stop it or take actions that will put it in a bad light.

Stakeholders, depending on the project, may include the the organization's shareholders, management, employees, customers, suppliers, end users, competitors, regulators, the community where the company operates, the society in general, etc.

\*PMBOK - Project Management Body of Knowledge Guide 7

# Why is effective Stakeholder Management important?

In most cases, projects fail when the interests and needs of stakeholders are ignored. This leads to a lack of buy-in from key stakeholders, which jeopardizes the success of the project.

When stakeholders feel their needs are being met, they're more likely to support the project. On the other hand, if their needs are not met, they may try to block your initiative. Stakeholder management helps build positive relationships that keep your project running smoothly.



An effective stakeholder management strategy is important for the following reasons:

## 1. Alignment with Objectives

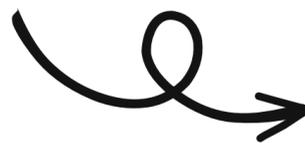
- Ensures Stakeholder Alignment: By engaging stakeholders early and consistently, you can align their expectations and needs with the project's goals. This alignment helps in steering the project in the right direction and prevents misunderstandings or misaligned objectives later on.

## 2. Improved Decision-Making

- Incorporates Diverse Perspectives: Stakeholders often come from different backgrounds and have varying levels of expertise. Engaging them allows you to gather diverse insights, leading to better-informed decisions and innovative solutions.

Write on this column why this applies to your case.

continued next page...



# Why is effective Stakeholder Management important?

## 3. Risk Management

- Identifies Potential Risks: Stakeholders can often foresee risks or challenges that might not be apparent to the project team. Effective stakeholder management allows you to identify and address these risks early, minimizing potential negative impacts.

## 4. Enhanced Communication

- Fosters Transparency: Regular communication with stakeholders ensures that they are kept informed about the project's progress, challenges, and changes. This transparency builds trust and reduces the likelihood of conflicts or resistance.

## 5. Increased Support and Buy-In

- Builds Trust and Commitment: When stakeholders feel heard and involved, they are more likely to support the project and commit resources. This support is crucial for overcoming obstacles and ensuring project success.

## 6. Conflict Prevention and Resolution

- Manages Conflicts Early: Proactively engaging stakeholders helps in identifying potential conflicts of interest or concerns. Addressing these issues early prevents them from escalating into bigger problems.

Write on this column why this applies to your case.



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# Why is effective Stakeholder Management important?

## 7. Improved Project Outcomes

- **Achieves Better Results:** Projects with effective stakeholder management are more likely to meet or exceed their objectives. Engaged stakeholders can provide the necessary resources, feedback, and support to ensure the project is successful.

## 8. Sustainability and Long-Term Success

- **Ensures Ongoing Support:** Effective stakeholder management fosters long-term relationships that can be beneficial for future projects. It also ensures that the project's outcomes are sustainable and continue to deliver value over time.

## 9. Compliance and Governance

- **Ensures Regulatory Compliance:** Engaging regulatory bodies and other key stakeholders early ensures that the project adheres to all necessary laws and regulations, avoiding potential legal issues.

## 10. Reputation Management

- **Enhances Reputation:** Managing stakeholders effectively can enhance the organization's reputation by demonstrating a commitment to collaboration, transparency, and ethical practices. This can lead to increased trust and credibility in the market.

Write on this column why this applies to your case.

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# 6 Steps in Stakeholder Management

The following 6 steps were adapted with slight modifications from the 5 steps in the PMBOK Guide as well as the varying number of steps from other references.

- 01 Identify Stakeholders**
- 02 Assess Stakeholders' Needs and Interests**
- 03 Prioritize Stakeholders**
- 04 Develop a Comprehensive Plan for Engagement**
- 05 Engage the Stakeholders**
- 06 Sustain the Engagement**



For more references, readers might consider consulting the following sources:

1. PMBOK Guide (Project Management Body of Knowledge) by the Project Management Institute (PMI): This guide provides comprehensive coverage of stakeholder management as a key component of project management.
2. "Managing Stakeholders as Clients: Sponsorship, Partnership, Leadership, and Citizenship" (Project Management Institute, 2015) by Mario Henrique Trentim: This book delves into the importance of stakeholder management and provides practical advice.
3. "A Stakeholder Approach to Strategic Management" (SSRN Electronic Journal · January 2001) by R. Edward Freeman and John McVea, This foundational text on stakeholder theory explains the significance of managing stakeholders effectively.
4. "Strategic Management of Stakeholders: Theory and Practice" (Long Range Planning, June 2011) by Dr. Fran Ackermann and Dr. Colin Eden: This book offers practical strategies for managing stakeholders in complex projects.

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# 6 Steps in Stakeholder Management



## **01** Identify Stakeholders

Identify all the individuals and groups who can impact your project, and can be impacted by your project, both positively and negatively. This includes internal stakeholders (such as team members) and external stakeholders (such as customers or suppliers).

To identify your stakeholders, ask yourself the following questions.

- Who will be impacted by your project?
- Who has an interest in your project?
- Who has the power to influence your project?
- Who wants your project to be successful?
- Who might want your project to fail?

Who are your stakeholders? If you are in doubt whether they are stakeholders or not, just list them down. You can list individuals or groups.

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# 6 Steps in Stakeholder Management



## 02 Assess Stakeholders' Needs and Interests

Understanding your stakeholders' needs and interests is essential in the formulation of your stakeholder management plan. This will help you assess what they want from the project and how best to engage with them.

List down your stakeholders and ask the following questions.

- What are their needs, priorities, and issues?
- What motivates them?
- What financial, operational or emotional interest do they have in the outcome of the project?
- Do these align with your project?
- What kind of power do they have to influence the project?

Aside from answering the questions above, if one wants to understand the needs and concerns of stakeholders, one needs to nurture one of the most important competencies needed by HR practitioners: Organizational Sensitivity.

### Organizational Sensitivity as a Competency

Organizational Sensitivity is the awareness and understanding of the formal and informal dynamics within an organization. It involves recognizing the power structures, cultural norms, and unwritten rules that influence decision-making, communication, and behavior. People who possess this competency are adept at navigating complex organizational environments, anticipating the reactions of others, and adjusting their actions to align with the organization's culture and politics.

#### Key Components of Organizational Sensitivity

1. Awareness of Power Dynamics
  - Understanding who the key decision-makers are and how influence is wielded within the organization.
  - Recognizing the informal leaders or influencers who may not hold formal positions of power but are critical to gaining support for initiatives.

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# 6 Steps in Stakeholder Management



02

## Assess Stakeholders' Needs and Interests

### Organizational Sensitivity as a Competency

2. Cultural Acuity
  - Being attuned to the organization's culture, including its values, norms, and unwritten rules.
  - Adjusting communication and behavior to fit the organizational culture, whether it involves formal processes or more casual, relationship-based interactions.
3. Strategic Communication
  - Tailoring messages to different audiences within the organization, taking into account their perspectives, interests, and potential concerns.
  - Knowing when and how to deliver messages to maximize impact and minimize resistance.
4. Relationship Building
  - Developing and maintaining positive relationships with a wide range of stakeholders, from peers to senior leaders.
  - Building trust and credibility through consistent, respectful, and empathetic interactions.
5. Anticipating Reactions
  - Predicting how different stakeholders will react to decisions, changes, or initiatives.
  - Being proactive in addressing potential concerns or resistance before they escalate.
6. Navigating Politics
  - Understanding the political landscape of the organization and using that knowledge to advance initiatives or protect interests.
  - Balancing competing interests and managing conflicts in a way that aligns with organizational objectives.

# 6 Steps in Stakeholder Management



02

## Assess Stakeholders' Needs and Interests



### Gathering Information About Stakeholders' Needs and Interests

Your perception of your stakeholders needs and interests will be limited by your own amount and depth of interaction with the stakeholders as well as your own perspectives and biases. Thus, it will be best to gather information directly from the stakeholders as much as possible.

Aside from being able to gather valuable information, the act of checking directly with your stakeholders will also communicate your willingness to listen to their concerns and consider their views in the implementation of the concerned project.

There are several ways you can gather information from your stakeholders, including:

- Interviews. You can interview stakeholders to get their views on the project. This can be done in person, over the phone, or via email. Those who have strong influence and interests in the project must be interviewed early into the process for them to have a sense of involvement which builds higher commitment.
- Surveys. You can send out a short survey to stakeholders to get their feedback on the project. This is a quick way to gather data from a large number of stakeholders. This is also an easy way to classify the feedback based on the groups where they belong to.
- Focus groups. You can hold focus groups with stakeholders to get their input on the project. This can be used to generate ideas and identify issues. It will be more useful to conduct focus group discussion with special interest groups.

When gathering information about your stakeholders, you must always practice empathy: look at the problem or issue from their perspective, avoid prejudice and be aware of your own biases.

**02**

## Assess Stakeholders' Needs and Interests

After your data-gathering, take a look at again your list of stakeholders on page 14 and list down their needs and interests, whether they explicitly or implicitly communicated to you. When listing down the analysis of your stakeholders, make a note on whether they are (+) Generally positive about the project; (-) Generally Negative about the project; or (=) Generally neutral about the Project.

### Stakeholders' Needs and Interests Assessment Form

STAKEHOLDER	NEEDS	INTERESTS

# 6 Steps in Stakeholder Management

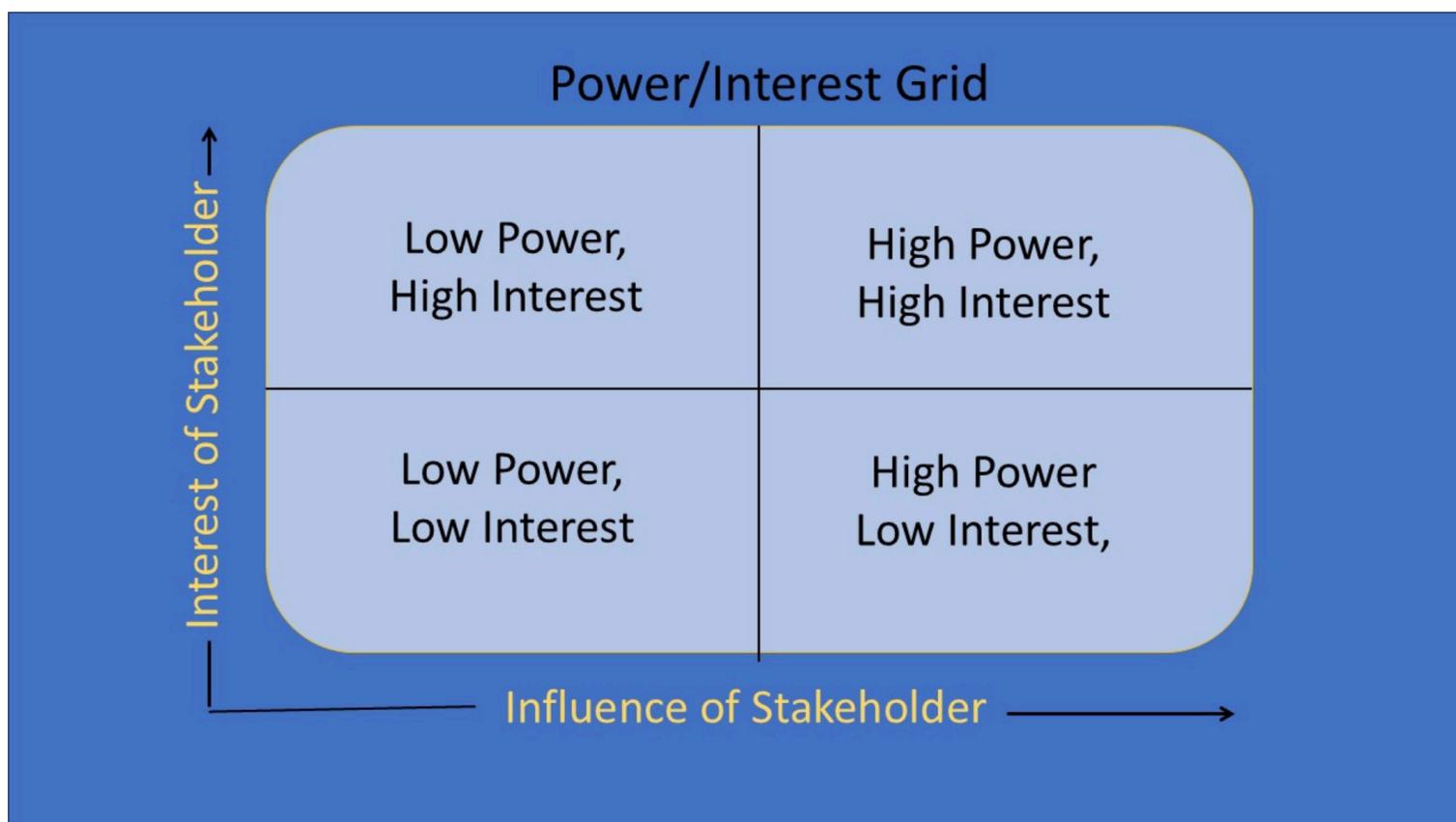


## 03 Prioritize Your Stakeholders

Prioritizing will help you focus your attention on the stakeholders most important to your project's success as well as ensure that others don't get sidelined due to inattention. You need to identify their expectations, their level of influence, the information they will want from you, and how often they want to know what is happening in the project. To do this, you need to conduct a stakeholder mapping exercise.

The stakeholder mapping grid below asks you to plot stakeholders on a two-by-two grid. One axis is labeled power/influence of the stakeholder and the other axis labeled as the stakeholder's interest.

On the power/influence axis, you rate each stakeholder on their ability to influence the project, which oftentimes, corresponds to their own position power in the organization. On the interest axis, you rate each stakeholder on their level of interest in the project. This will give you a clear picture of which stakeholders are the most important to engage with and how best to do so.



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# 6 Steps in Stakeholder Management



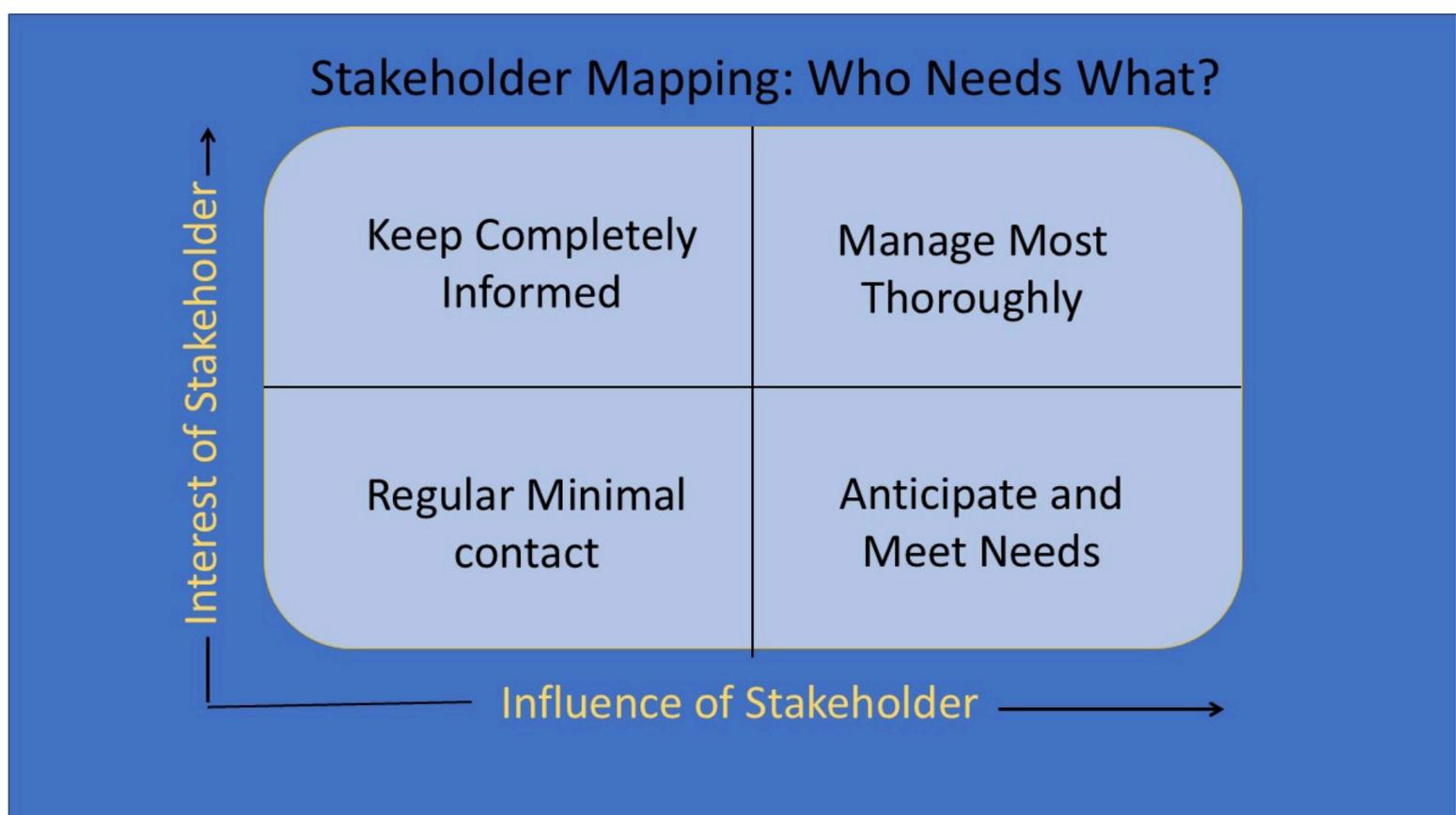
## 03 Prioritize Your Stakeholders

### Mapping Your Strategy

Based on your stakeholders' location in the Power/Interest Grid, you can determine your general strategy in managing your stakeholders.

- High Power, High Interest - Manage Most Thoroughly
- Low Power, High Interest - Keep Completely Informed
- High Power, Low Interest - Anticipate and Meet Needs
- Low Power, Low Interest - Regular Minimal Contact

Caution, however, must be observed. Your assessment of the stakeholder's interest and influence might vary significantly from their own perception of their power and influence. Thus, you will still need to individually plan how to manage those whose own perception of their power and influence is higher than yours.



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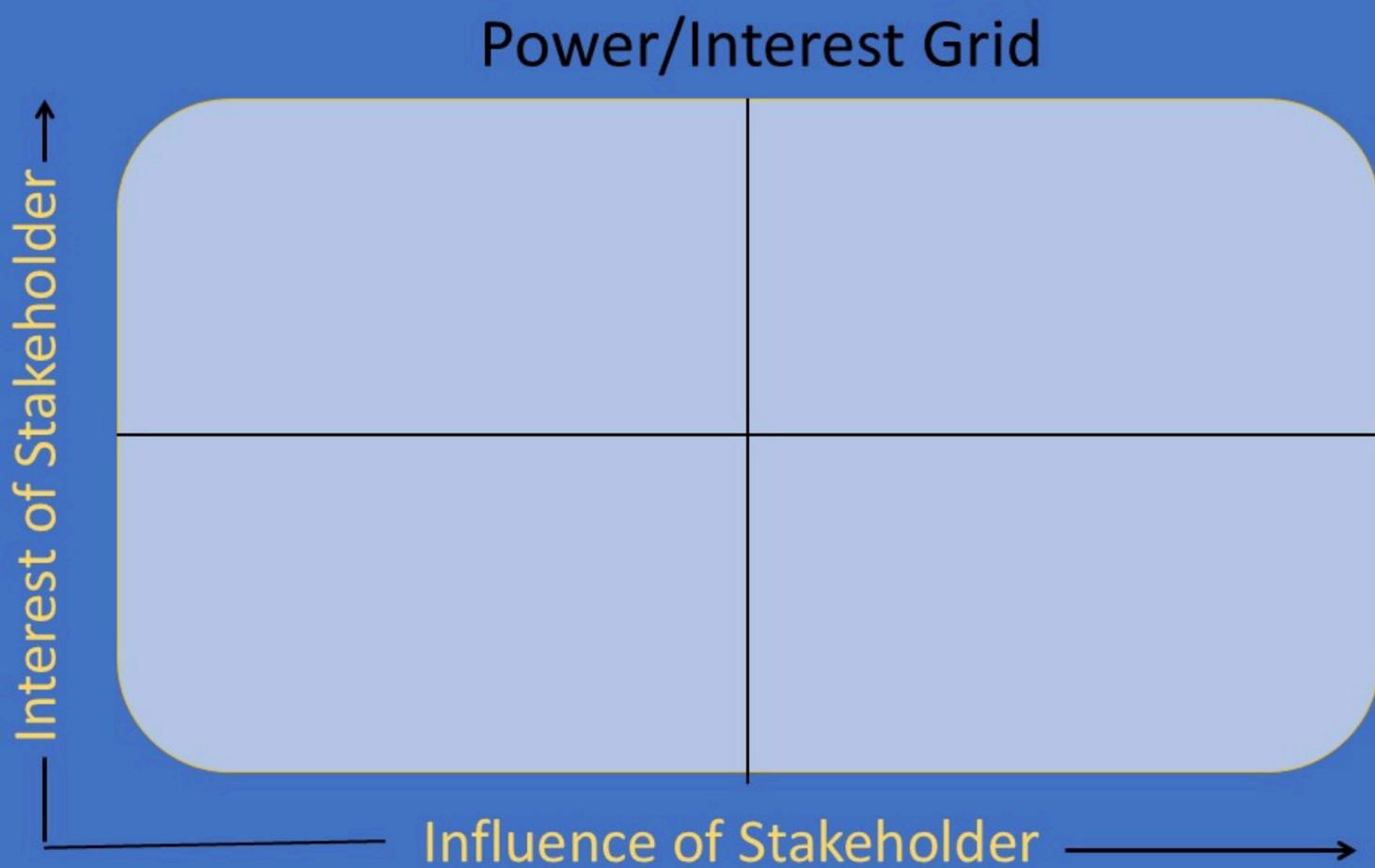
# 6 Steps in Stakeholder Management



## 03 Prioritize Your Stakeholders

### Mapping Your Stakeholders in the Grid

Indicate in the appropriate box the location of your stakeholders based on your assessment.



Make a note below on the stakeholders who might have an outsized interest in the project as well as perception of their own power.

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# 6 Steps in Stakeholder Management



## 04 Develop a Comprehensive Plan for Engaging Your Stakeholders

Deborah Vogwell (2003)\* states that the basic requirement is to manage the project so that positive stakeholders are in the bottom right hand corner and negative stakeholders are out of that corner. She pointed out that the matrix is dynamic: changes of individual within stakeholder organizations or changes to your project will be reflected in the matrix. She recommends the following strategies that you may wish to adopt to deal with the various groups.

### High Power, High Interest

If they are positive about the project:

- 1) Regularly provide them with information to maintain their support.
- 2) Consult with them prior to taking project decisions
- 3) Regularly check for their opinion and reaction to the progress of the project.
- 4) Involve them in your project. Make them part of your project steering group.
- 5) Use them to lobby other groups and make them voice their support.

If they are negative about the project:

- 1) Use other positive stakeholders to lobby them and hopefully change their views.
- 2) Find out what is important to them and help them out to get their favor.
- 3) Provide more information that could help address their concerns.
- 4) Reduce opportunities for them to influence other groups.
- 5) Demonstrate that you are doing your best to limit adverse effects on them.

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\*These strategies for stakeholder engagement were adapted from Vogwell, D. (2003). Stakeholder Management. Paper presented at PMI® Global Congress 2003—EMEA, The Hague, South Holland, The Netherlands. Newtown Square, PA: Project Management Institute.

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# 6 Steps in Stakeholder Management



## 04 Develop a Comprehensive Plan for Engaging Your Stakeholders

### High Power, Low Interest\*

The high power, low interest group are usually generally neutral about their project which is the reason for their low interest.

However, due to their high power, they could be considered as unexploded bombs. Some events or individuals, however, may increase their interest which may prompt them to use their power to influence the project.

### Strategies:

- 1) Find out what is important to these groups and make sure that the project does not adversely affect those interests. If the project is likely to have a positive effect for them, inform them.
- 2) Monitor their interest regularly. Make sure that changes to the project or changes within the stakeholder organization do not suddenly increase the level of negative interest.
- 3) Beware of other negative stakeholders passing information to this group to encourage them to oppose the project.

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\*These strategies for stakeholder engagement were adapted from Vogwell, D. (2003). Stakeholder Management. Paper presented at PMI® Global Congress 2003—EMEA, The Hague, South Holland, The Netherlands. Newtown Square, PA: Project Management Institute.

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# 6 Steps in Stakeholder Management



## **04** Develop a Comprehensive Plan for Engaging Your Stakeholders

### **Low Power, High Interest**

#### **If they are positive about the project:**

- 1) Maintain their enthusiasm and interest in the project. They are good allies to have.
- 2) Regularly provide them with information. Invite them to presentations. Involve them as much as resources allow. This can be done inexpensively through a project website, newsletter or open presentations.
- 3) Seek their input and opinion if you can to show that you give them importance. If the inputs cannot be implemented, let them know the reason.

#### **If they are negative about the project:**

- 1) Address all of their concerns in a documented manner and try to get their commitment to support the project in one way or another after it has been shown that their concerns have been addressed.
- 2) You may need to get the project sponsor or your high power allies to take a firm line with them if they persist in their opposition.
- 3) They make take a lot of time and resources because of their repeated emails or calls. Do not spend too much time on them once you have addressed their concerns as their power is low.

### **Low Power, Low Interest**

#### **Strategy:**

- 1) Don't spend too much time on them but provide them regularly with information through a newsletter or a blast message.
- 2) Be nice to them. Their position or view may change in the future

\*These strategies for stakeholder engagement were adapted from Vogwell, D. (2003). Stakeholder Management. Paper presented at PMI® Global Congress 2003—EMEA, The Hague, South Holland, The Netherlands. Newtown Square, PA: Project Management Institute.

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# 6 Steps in Stakeholder Management



05

## Engage Your Stakeholders

As you implement the project, engage your stakeholders. A good way to engage them is to treat your project as a continuous marketing campaign. Just like in a marketing campaign, you create a buzz before and during the launch via teasers, press releases, and partnerships with influencers. Think about how your stakeholders can be involved in all these buzz and social media campaigns in order to become invested in the project.

As your project progresses, the stakeholders will feel more comfortable and confident about the project if they receive regular reports on the progress of the project.

If there will be delays, communicate the reasons for the delays. Your allies should not feel surprised if there are issues that impact on the project's progress.

Make your progress reports easy to understand through the use of infographics.

You may want to issue a "Call to Action" if you need any kind of support to the project. Involvement can strengthen support to the project. Make it easy for stakeholders to access information about the project as well as provide support if needed. These processes allow you to tap into the knowledge, skills and creativity of a wider range of individuals.

Communication should occur as freely as possible. Decisions made should be communicated to a wide group as efficiently as possible. One mechanism to keep stakeholders informed is to ask sectors or departments to nominate project representatives to a working committee which could become not only their regular line of communication but also give them a sense of involvement in the way the project is implemented.

Projects are implemented to meet short and long-term needs of organizations. Be sure that your stakeholders see and feel the short-term impacts while illustrating how they will lead to the ultimate success of the project over the long term.

# 6 Steps in Stakeholder Management



## 06 Sustain the Engagement

When implementing a project, especially over an extended period, change fatigue can become a significant barrier to success. It's essential for HR to play a proactive role in ensuring that stakeholder engagement is not only initiated but sustained throughout the process. Here's how HR can achieve that:

### 1. Clear and Consistent Communication

- **Transparent Messaging:** Keep stakeholders informed with regular updates about the change initiative. This includes progress reports, upcoming changes, and the rationale behind decisions. Transparency reduces uncertainty and helps maintain trust.
- **Two-Way Communication Channels:** Establish mechanisms for stakeholders to voice their concerns, ask questions, and provide feedback. Regular town halls, Q&A sessions, and anonymous surveys can be effective.
- **Tailored Communication:** Different stakeholders have different needs and concerns. Review your Power/Interest Grid and check the expected amount of information by stakeholders in each box. HR should tailor communication to address these specific needs, ensuring relevance and resonance.

### 2. Address Change Fatigue Directly

- **Acknowledge and Validate Concerns:** Recognize that change fatigue is a legitimate concern. HR should acknowledge this and provide support through resources like counseling, stress management workshops, or simply creating spaces for open discussion.
- **Break the Project into Manageable Steps:** Instead of overwhelming stakeholders with large-scale changes, HR can help in breaking down the initiative into smaller, more manageable phases. Celebrating small wins can help maintain momentum and reduce fatigue.
- **Flexible Implementation:** Be open to adjusting timelines or approaches based on stakeholder feedback. Showing flexibility demonstrates that the organization values stakeholder well-being over rigid adherence to a plan.

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# 6 Steps in Stakeholder Management



## 06 Sustain the Engagement

### 3. Monitoring and Feedback Loops

- **Regular Check-ins:** HR should conduct regular check-ins with stakeholders to assess their engagement levels and identify signs of fatigue early. This could be through pulse surveys, focus groups, or informal conversations.
- **Adapt Based on Feedback:** Use the feedback to adjust the change strategy if necessary. Being responsive to stakeholder concerns helps sustain engagement and demonstrates that the organization is listening.

### 4. Recognition and Rewards

- **Recognize Effort and Commitment:** Acknowledge the efforts of stakeholders who contribute positively to your project. Public recognition, rewards, or simple gestures of appreciation can go a long way in keeping people motivated.
- **Celebrate Milestones:** Celebrate key milestones or achievements during the change process. This not only provides a sense of accomplishment but also serves as a reminder of the progress being made.

By implementing these strategies, HR can help sustain stakeholder engagement throughout a change initiative, minimizing the impact of change fatigue and increasing the likelihood of successful outcomes.





Read the succeeding chapters in the field book:

# Managing and Influencing HR Stakeholders: A Field Book

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- Certified in Design Thinking (Bain & Company)
- Developed the 3H+3Cs Approach in Change Management
- International Speaker and Trainer. Delivered talks and conducted training in the USA, Taiwan, Singapore, Malaysia, Indonesia, Thailand, Philippines, Hongkong, and India.
- Master Trainer, Targeted Selection, Assessment Center & Service Plus
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# Introduction to HR Stakeholders' Management



Head. Heart. Hands . Creating the Conditions for Change.

