CILIP Conference 2015

Bringing the information world together

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Primary sources for teaching and research

Making the right connections
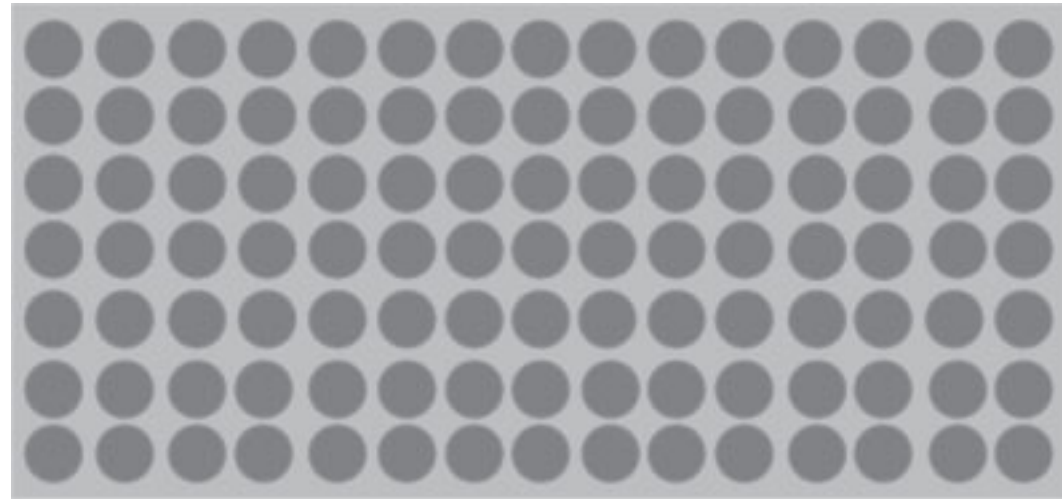
Engaging stakeholders
Building and maintaining relationships
Delivering clear benefits

CILIP Conference | Liverpool | 2-3 July 2015

What will be discussed today?

The importance to information teams of developing a strong stakeholder network within their respective organizations.
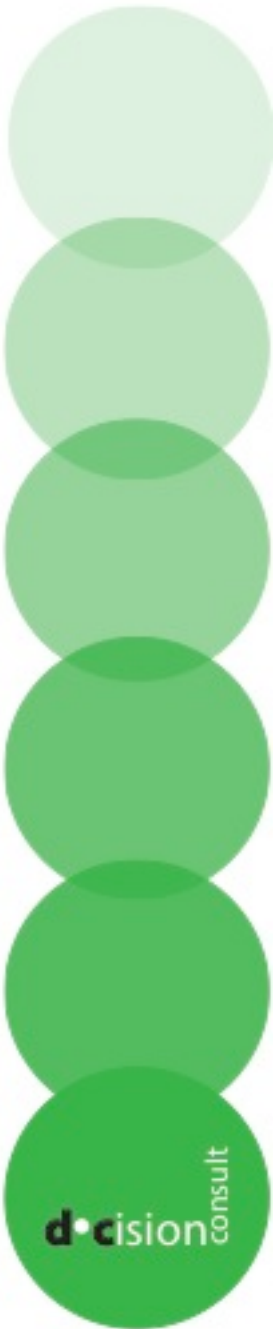
1. Understanding Who; Why; and When.
2. Building and maintaining the relationships.
3. Additional tools and tips.

With Examples

Preparation is the key to success

If you want people to come with along with you on your journey you need to know where you are going…

…don't start this process until you are clear about your strategy and the related objectives and goals.

Creating your
stakeholder engagement strategy

- **Your messages | Your objectives**
  - What do you want to say? | What do you want to achieve?
  - Who is the audience?

- **Communication channels**
  - Face-to-face.
  - E-mail.
  - Your strategic plan.
  - Your services / output.
  - Meetings – team, department, strategy, advisory.
  - Presentations – you, suppliers.
  - Intranet site.
  - Internal wikis.
  - Social media (if you have a large external network).
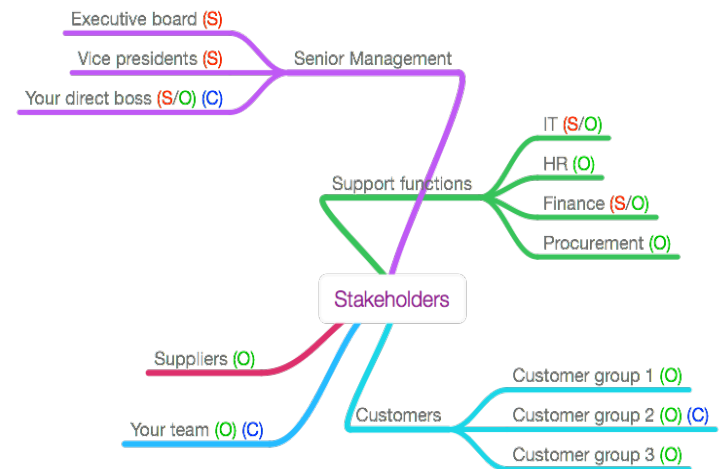
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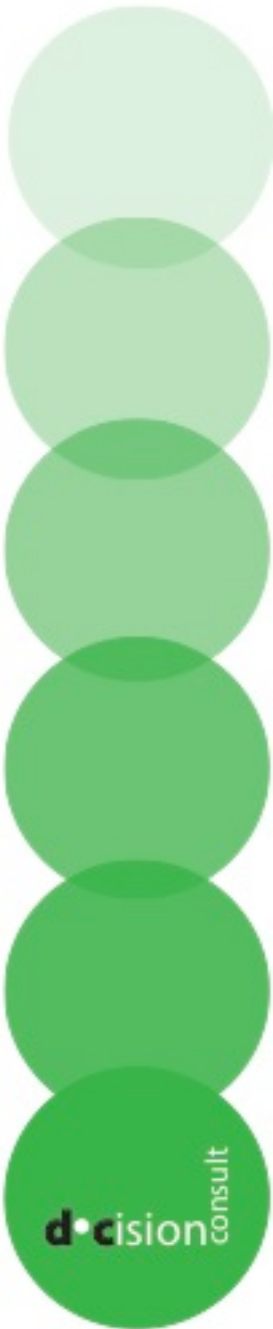
Creating your
stakeholder engagement strategy

- **Planning calendar**
  - Meetings – decision and information.
  - Hosting events.
  - Running surveys.

- **Resource planning**
  - Budget.
  - Staff time.

- **This is a 2-way process**
 - Scheduling follow-ups.
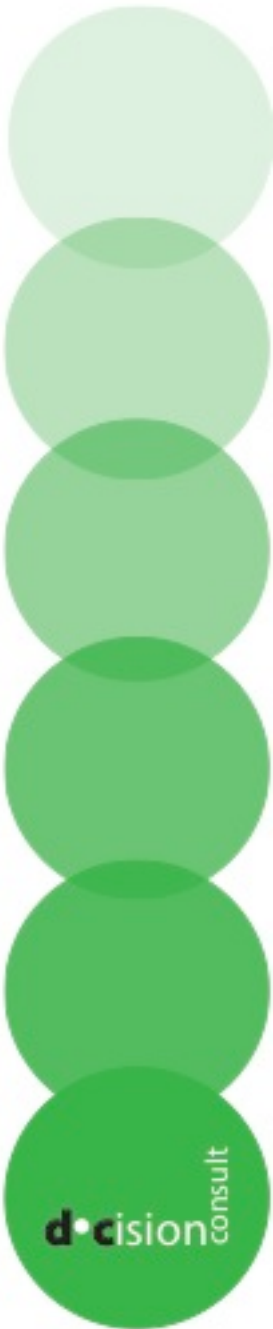
Identifying your stakeholders

- Look across your entire organization – don't forget to look outside too.

- Who are the influencers?

- Think outside the box to find stakeholders that deliver unique perspectives.

Executive board (S)
Vice presidents (S)   Senior Management
Your direct boss (S/O) (C)

IT (S/O)
HR (O)
Support functions   Finance (S/O)
Procurement (O)

Stakeholders

Suppliers (O)
Customer group 1 (O)
Your team (O) (C)   Customers   Customer group 2 (O) (C)
Customer group 3 (O)

Identifying your stakeholders

- Create a stakeholder map, identifying particular roles, for examples:
    - Strategic (S)
    - Operational (0)
    - Champion (C)

- Look at the geography – are there cultural or other factors which come into play?
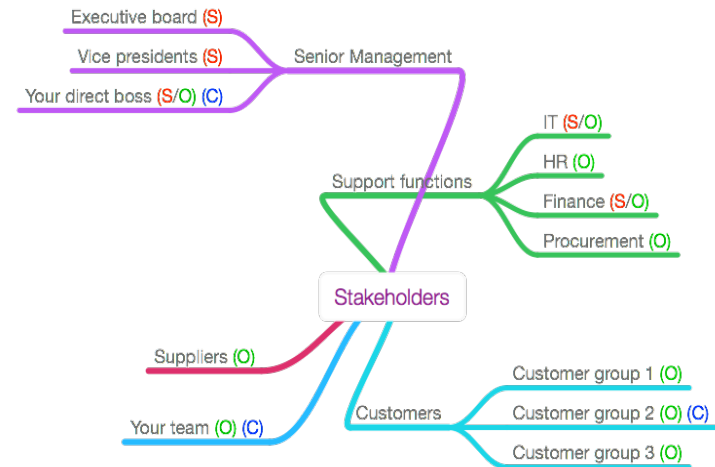
Examples

- **Your team**
  - What are their needs?
  - Does all the team buy-in to your strategy?

- **Suppliers**
  - See if they will do a "knowledge" presentation in addition to their sales pitch.

- **Key Opinion Leaders** (KOL)
  - Pharmaceutical companies use KOLs to drive acceptance and uptake of their products. Find your own (possibly external) KOLs – with expertise to provide additional perspective.
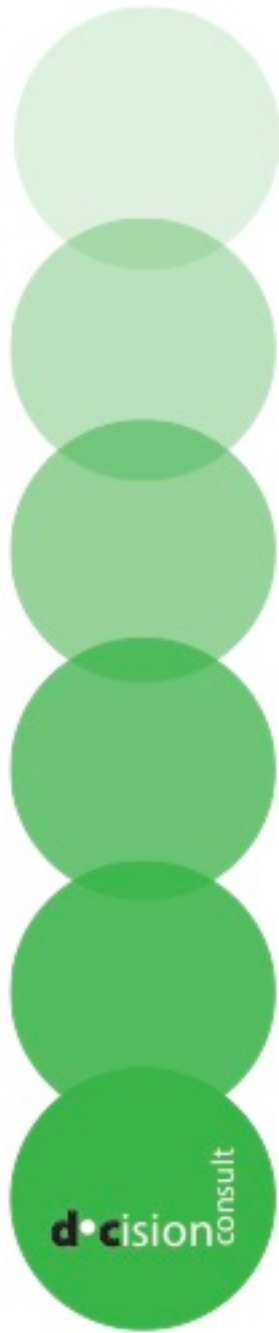
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Describing your stakeholders

- **What specific input do you want from each group / individual?**
  - Knowledge and experience.
  - Specific expertise.
  - Responsibility – are they the decision makers?
  - Buy-in.
  - Influence.
  - Another perspective.

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Starting to build a stakeholder knowledge base*

Stakeholder	Department	Strategic / Operational / Champion	Knowledge Experience		Comments
Individual x	Medical	Champion	Knowledge & Experience	✔	
			Specific Expertise	✔	
			Responsibility		
			Influence		
			Buy-in		
			Perspective	✔	
Individual y	Executive Board	Strategic	Knowledge & Experience		
			Specific Expertise		
			Responsibility	✔	
			Influence	✔	
			Buy-in		
			Perspective		
Customer group z	Sales	Operational	Knowledge & Experience	✔	
			Specific Expertise		
			Responsibility		
			Influence		
			Buy-in	✔	
			Perspective		

*Precisely which information you can store needs to be checked with your Legal department to ensure compliance with privacy and data protection regulations and policies.

Continuing to build a stakeholder knowledge base*

Stakeholder	Department	Strategic / Operational / Champion	Contact description		Date
Individual x	Medical	Champion	Library committee	✔	June 2015
			Speaker	✔	February 2015
			Survey		January & April 2015
			One-to-one chat		February 2015
Individual y	Executive Board	Strategic	One-to-one meeting		January 2012
Customer group z	Sales	Operational	Survey	✔	January & April 2015
			Presentation to team		May 2013

*Precisely which information you can store needs to be checked with your Legal department to ensure compliance with privacy and data protection regulations and policies.

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When to engage?

- Effective planning to achieve success.

- Avoiding a mismanaged engagement that can have far-reaching and long lasting negative consequences.

- Take care not to over-engage with individuals or teams. It is easier to engage with your champions but you need to fully understand those who are less appreciative of your services and critically review any negative feedback.

- Prioritize stakeholders – who should you contact first?

Examples

- **Schedule meetings to coincide with decisions**
  - Library committees – schedule meetings to coincide with decisions that need to be taken. Use them to drive the service rather than as an information update.

- **Use specific groups only at key momen**ts
  - For example using pre-selected stakeholders to consider subscription renewal options.

- **Check the group composition each time**
  - Do you have the right people for the current issue you are addressing?

Building the relationships

- What are your stakeholders' key drivers?

- How are they connected both inside and outside the organization?

- What value add for the stakeholder is there in working with you?

- How will you start the conversation?
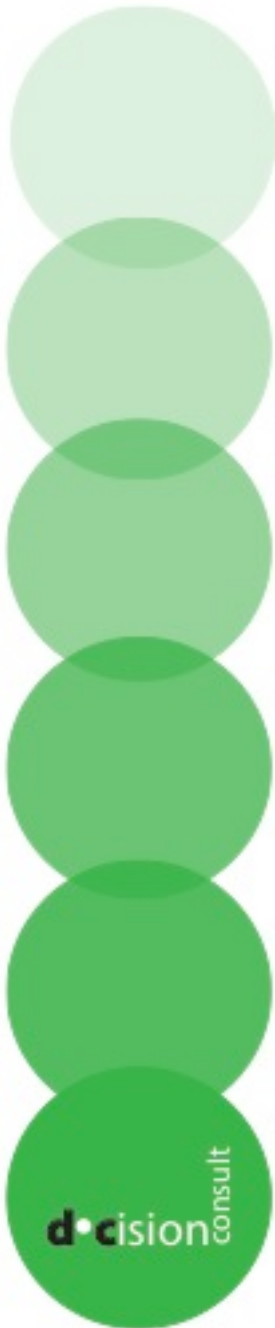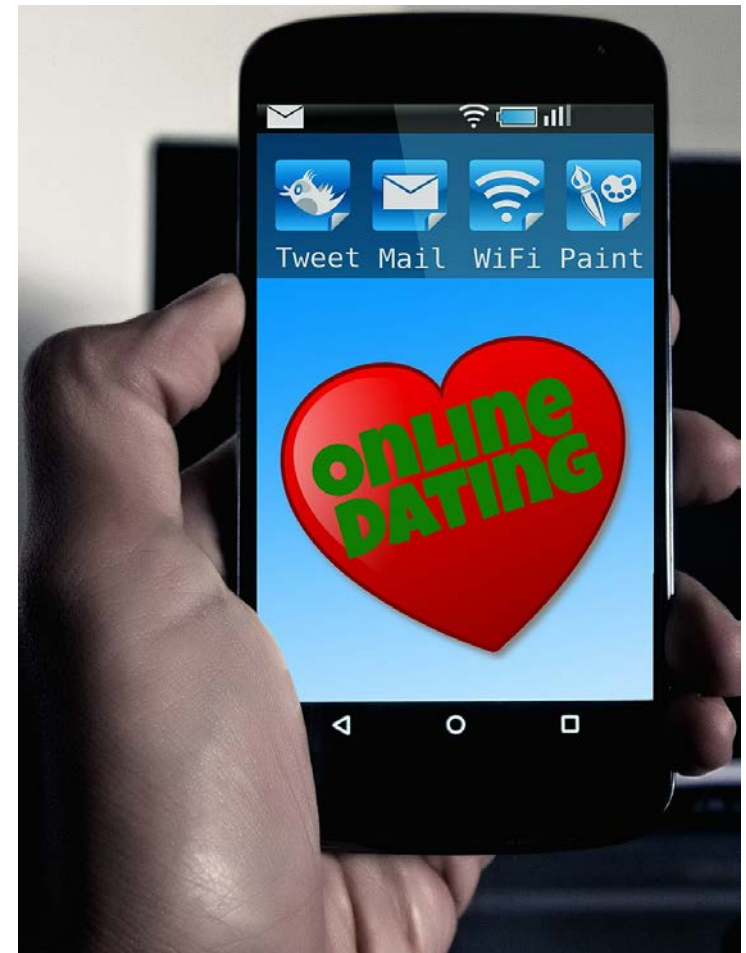
Examples

- **Engaging with the the finance teams**
  - Make the connection with finance and procurement well before budget season.
  - Fully connecting and engaging with the finance teams – both the budget and the procurement teams allows development of a more flexible budget and creative negotiations with external suppliers.

- **Influencers and persuaders**
  - Don't wait until you have a crisis or a particular need to reach out to those who have influence.

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Maintaining the relationships

- Build a collaborative relationship – view this as a long-term relationship.

- If you have a larger team think about matching team members to stakeholders to help develop long-term partnerships.

- Map them to you but also map their relationships and networks
  - Can you help them make a better connection?
  - Can you engage with them on a topic that improves their working life?

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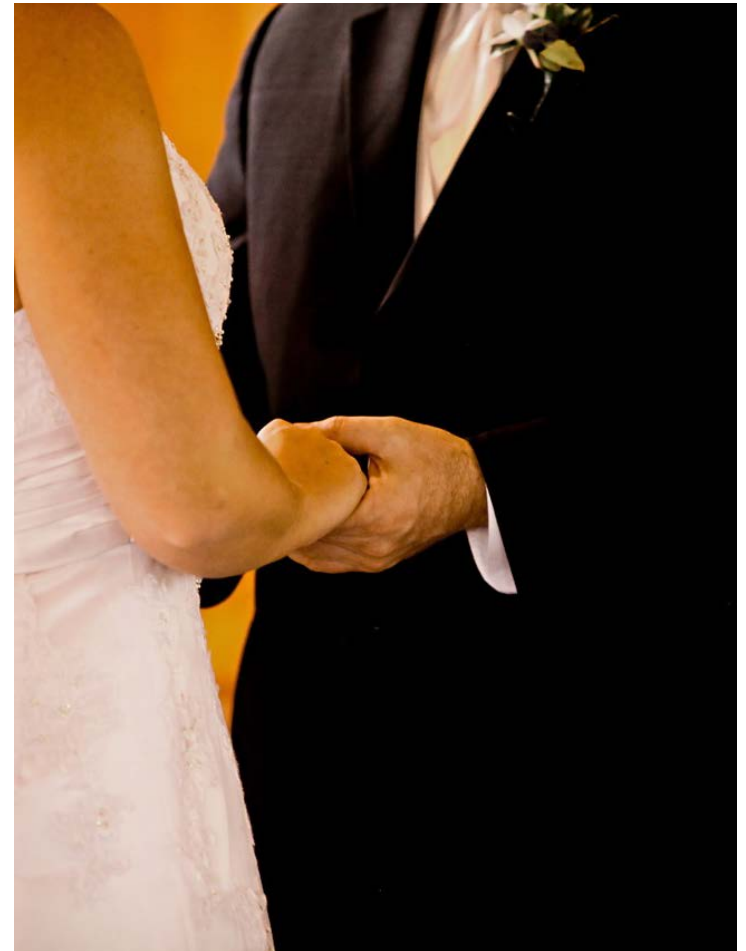
Examples

- **Make your stakeholder map/database a living document**
  - Continuously update to reflect the current situation, and future scenarios.
  - Document network "blockers" as well as "enablers", ensuring this is kept at a team or department level not a personal level.

- **Keep connecting & maintain a balance**
  - Try to ensure your engagements are proportional, think about a balance between conversation and other activities such as meetings; surveys etc.
  - 80% conversation to 20% other activities? Work out what's right for you but conversation should always be the largest activity.

What are the benefits?

- Ensuring continued relevancy.

- Getting senior management buy-in.

- Building support from other functions.

- Developing cross-functional projects that save the organization time, money and/or improve quality.

Gold Standard Service

✔
Money

Quality ✔

Time ✔
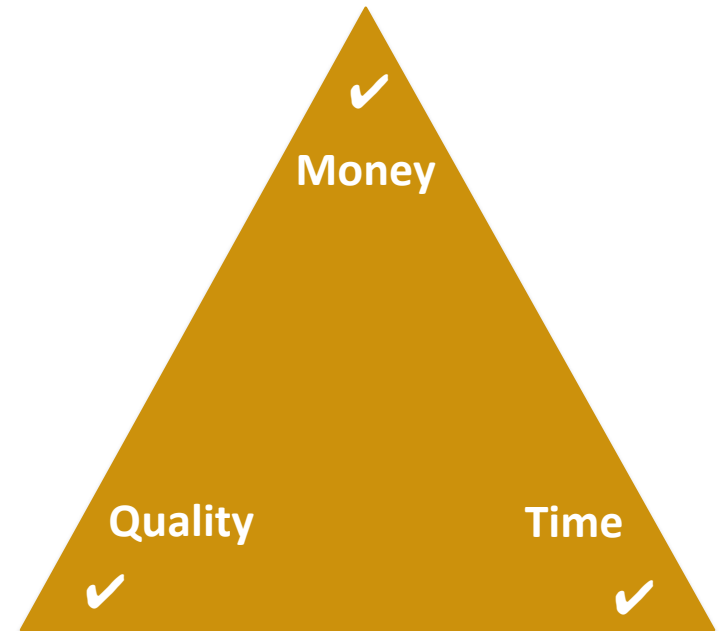
Examples

- **Creating an Information Manager driven connection**
  - A non-management mandated relationship between Research and Commercial libraries, enabled a joint project to provide a news and commercial information service which delivered across the organization, avoiding duplication of effort and providing an improved service to both customer sets.

- **Leveraging relationships to save mone**y
  - The same non-management mandated relationship was used to negotiate joint contracts with external suppliers saving thousands of Euros.

Additional tools and tips

- Use technology (databases, calendar tools, intranets) to assist with the management – but do take care to manage any data protection issues.

- Think about ways to measure and evaluate stakeholder interactions.

- Behave ethically.

Examples

- **Feedback through conversation**
  - Are stakeholders getting what they want?
  - Did they have other expectations?
  - Do they feel involved? Too much or too little?
  - Do they feel benefit(s) – what are they?

- **Self-assessment**
  - Evaluation can be as straightforward as critically assessing if a particular campaign, for example subscribing to a new database, was a success or not.
  - Be prepared to accept that failure may mean the approach you used and the network you engaged were not the right ones.

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Final thoughts

- Remember that people like to be asked their opinion and to feel their opinion is valued, no matter what their level.

- Having a specific project either to explain or to ask for help with is more much effective than a general conversation.

- Having a strong and fully network helps build the most relevant service for your organization.

- If you don't ask…
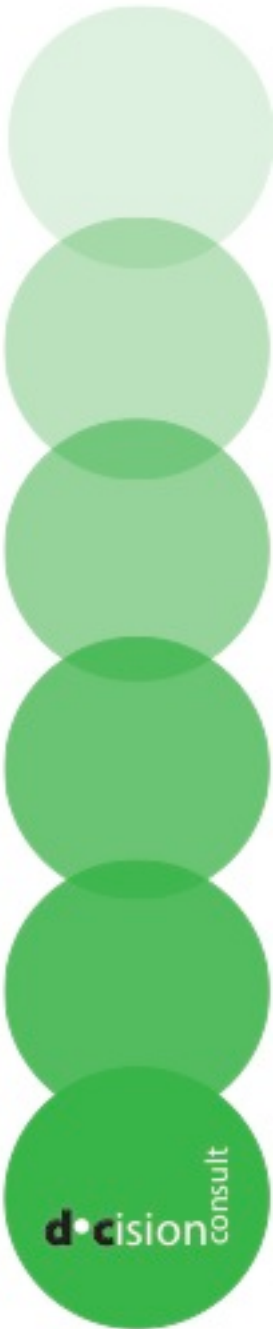
Thank you for your time & attention today.

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