



# A Guide To Creating Stakeholder Delight

## 1. The Big Picture : Mapping The Stakeholder Landscape

What if every stakeholder loved to work with you and for you?

Let's start with what gets in the way.

- You usually start from zero - as you enter a new customer you most often have no existing relationships
- You are only ever one of many competing priorities. It doesn't matter how important you think what you have to say is - your stakeholder decides how important you are to them. Not the other way around.
- Stakeholders care about the value you offer for them. Period. We can dress it up in all sorts of other language but if you don't show up carrying value don't expect to maintain the attention of your audience
- Stakeholders are elusive, especially as they get more senior. So even getting on the radar is tough.

There are five simple steps to master that will make creating stakeholder delight your reality.

- Map the stakeholder landscape
- Understand the value that matters most to every stakeholder
- Build and execute a stakeholder access strategy
- Make every interaction with you a world class experience
- Build sustaining relationships

In this guide we'll be digging into each of these steps with a series of tips to help you master every step.

### 1.1 Mapping The Stakeholder Landscape : What Is A Stakeholder?

First question. What is a stakeholder? It's a widely used word so here's the definition we're working with.

"The specific groups and individuals within our customers with who we must interact effectively in order to deliver successful outcomes for those customers from their investment in our solutions."

There are, in our view, 4 key groups of stakeholders you must understand and interact with if you're going to deliver the maximum amount of value to your customers. We'll share those later in the guide.



### **1.2 Mapping The Stakeholder Landscape : When And Where To Engage?**

We just looked at "what is a stakeholder?" Next let's be clear on exactly why our stakeholders matter so much. An effective way to do that is to work backwards.

Customers buy from us to achieve outcomes, each of which has an associated specific value or ROI. To deliver those outcomes we need to identify and agree specific goals, or milestones along the way

And to reach the milestones we must agree on the right set of steps, the ownership of those steps and the allocation of resources to make sure they happen to plan

The most effective way to ensure these steps are identified, agreed and executed upon is to be connected with all of the stakeholders required at your customer to ensure rapid and efficient progress.

### **1.3 Mapping The Stakeholder Landscape : Understand Stakeholder Groups**

How do you make sense of all the people you have to deal with? Can you align them with groups that makes dealing with them, identifying their outcomes and value and creating your stakeholder strategy easier?

We think you can. We think it makes life much easier when you have a simple structure in place. We call out these four groups in our training course:

- Owners
- Champions
- Users (Creators)
- Enablers

### **1.4 Mapping The Stakeholder Landscape : Create A Stakeholder Map**

If a picture is worth a 1000 words a stakeholder map is just as efficient. I'd go as far as to say for any account above a basic level of complexity a clear picture of your stakeholders, their interests, their relationships, what they can do for you and what you can do for them is one of the most valuable artefacts you can create.

More complex solutions for large and complex customers will benefit from a richer stakeholder map. If you're working with simpler solutions and/or less complex accounts you don't need to invest so much design time to create, or execution time to maintain, the picture you need.

Tune your stakeholder map to your circumstances but make sure you have one if you're working with anything more than a simple stakeholder landscape (and maybe even then).

## **2. The Big Picture : Understanding Your Value**

It's always been our belief at Success Methods that delivering customer value is the most important job for the customer success team. In this section we'll cover what that means for you, your employer and most importantly your stakeholders.

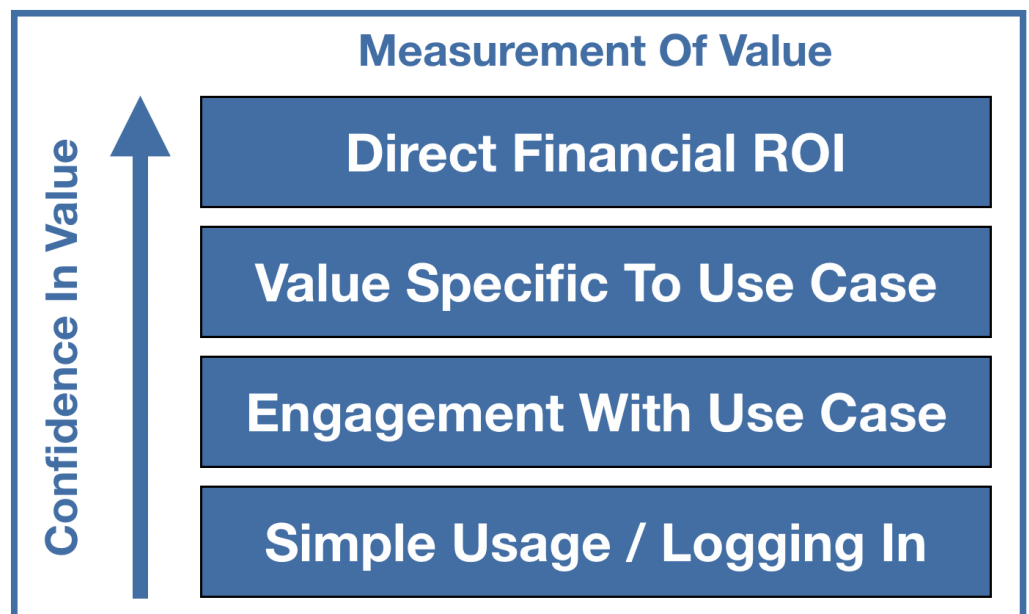


We're going to cover 4 areas:

- 1) Your value framework. How do you ensure you have a crisp, simple way to describe and communicate the value you deliver to your customers. Something that you can readily apply and use consistently across your team and with every customer.
- 2) Bringing value with you from onboarding to ROI. It's not about adoption, although that is a step in the journey. Value ultimately is about ROI so how do you deliver 100% of what's available for every customer?
- 3) How does value, what you deliver and what you talk about with each stakeholder group vary. We already talked about Owners, Champions, Users and Enablers. Your value for each group is different yet all are essential to success.
- 4) Bringing all of this together in a value model. A simple to use approach that allows you to define, communicate and measure value by stakeholder.

### **2.1 Understanding Your Value : Have A Value Framework**

What do we mean by value framework? For us it's two parts. A way to think about or describe the value you deliver to your customers. At Success Methods it's our Value Hierarchy. At the highest level it splits value delivery into four areas or if you prefer stages. At each stage we work with our customers to help them translate their business value into this structure.



This is only one way of working and while it resonates with our customers other models can of course work just as well. What's important is that you've thought this through, developed a framework for thinking about and communicating value with your stakeholders and built out the detail needed to take it into operation.

### **2.2 Understanding Your Value : Carrying Value From Onboarding To ROI**

Sales have a funnel, customer success have a pipe. Sales expect to shed prospects as they work through the funnel, perhaps as few as 1 in 10 leads will become customers.



In customer success we want to ensure that at every stage of a customers' journey from onboarding to ROI the right advice is given, the right steps are taken and the right measurements are used to ensure nothing is lost on the journey to 100% of the available ROI being realised over time.

As you'll see, the benefits of a value framework show up when you are thinking about how to do this. In our case we're wondering how do we ensure 100% of users are present and then how do we ensure 100% know exactly how to use the solution to maximum effect.

Once that's done what's needed in process and measurement so that our customers can extract 100% of the solution's value which finally we want to work with our senior stakeholder to translate into the ROI (again 100% of it) that matters most to them.

### **2.3 Understanding Your Value : Carrying Value From Onboarding To ROI**

Solutions deliver value for multiple stakeholder groups. Users of the solution take away one value, for example, help me find the training I need whereas what we call Champions take something else, for example, better trained employees have higher productivity. And if you can measure increased productivity and work with your customer to translate that into a number your conversation with the Owner may be about reduced costs.

When you are working with your various stakeholders you therefore get the best results if you target your message, your description of value delivery, to the outcomes and measurements that matter most to them.

For example, the CRO wants to know if sales are up as a result of deploying your solution. The only reason to every present her with a chart showing logins is to highlight an issue where you need her help after your work elsewhere has failed to bring that issue to a resolution.

### **2.4 Understanding Your Value : Create A Stakeholder Value Model**

There's some work to clearly understand, articulate and track progress on your value delivery for each stakeholder. So consider creating what we call Stakeholder Value Models. The simplest (we believe) possible way to define, communicate, manage and maintain your picture of value for each of your key stakeholder groups at your customer.

It's a bit of work, best done on a CS platform but a spreadsheet's going to work fine too and is certainly better than not having this clearly set out and consistently applied (by each CSM at each customer).

Combined with your stakeholder map it'll given you the comprehensive picture you'll need as a foundation for accessing and sustaining all of your core stakeholder relationships.



### 3. The Big Picture : Build And Execute An Access Strategy

One of the biggest challenges we hear from customer facing professionals is getting access to the all of the right stakeholders. If we're not connected to the right people were at least partially blind to the true picture at the account. We might not fully understand how we are perceived, we might not be aligning our work to the overall vision of our customer, we might lack resources or critical support.

Let's look now at 4 aspects of building and executing an access strategy for key customers stakeholders:

- What are the barriers to access?
- A simple model of stakeholder relationships.
- How do we use connections to make connections?
- The importance of stakeholder mapping.

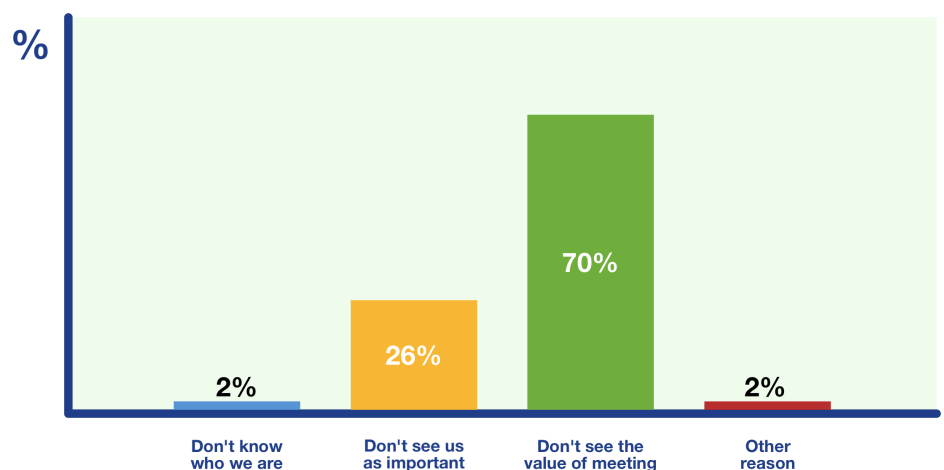
#### 3.1 Build And Execute An Access Strategy : What Are The Barriers To Access?

One word - value.

Key stakeholders don't see the value in meeting with you so they won't or do so once then become, shall we say, elusive. Another way of putting this is key stakeholders don't see a relationship with you as important (because they don't see the value).

That's certainly what you indicated when we ran a LinkedIn poll earlier this year and it's also what we hear, frequently, from customer facing professionals. Senior people won't agree to meet because they don't see the value.

#### **What do you believe is the most common reason your key senior customer stakeholder(s) won't agree to meet with you?**



If you've read our value section you'll hopefully have a bunch of new ideas about defining and positioning your value with your stakeholders. Understanding your audience is key, fine tuning your message and presentation is key, above all talking about value in business language is key. So you're ready to talk. How do you get the meeting?

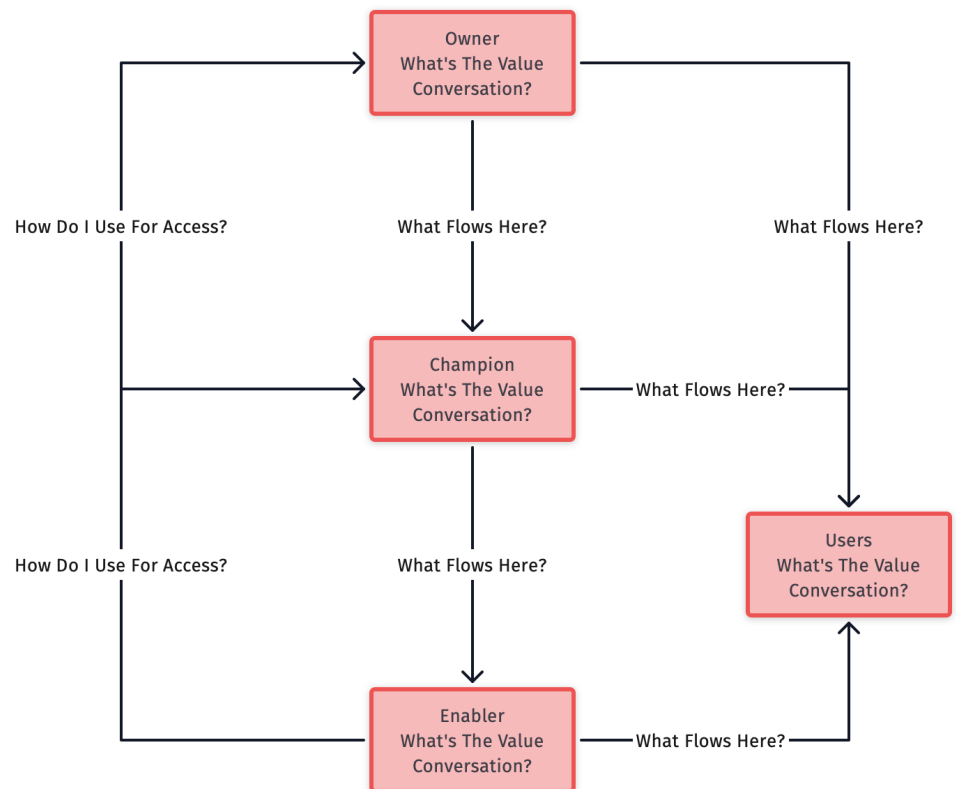


### 3.2 Build And Execute An Access Strategy : A Simple Model Of Relationships

A simple model of stakeholder relationships is critical if you are going to construct a clear picture of who connects with, influence and directs who at your customers.

We like to use the simple, three point model below when we think about the relationships within our customers:

1. What's the value for each stakeholder (we've covered that in depth)
2. How can I use a relationship for access to more senior people
3. What flows down, or in other words how can I use a relationship for indirect influence, to gain access to resources or to indirectly give direction?



You could make things more complex but there's no need. Figure out just these three things and you are well on your way to mastering stakeholder management.

### 3.3 Build And Execute An Access Strategy : Connections Make Connections

You have three sets of connections you can use when ever you are trying to use your existing connections to make new connections:

1. Your existing connections at your customer
2. People in your organisation connected to people you want to connect with
3. People in your broader network with connections to people you want to connect

These are, in order of likely importance, the routes you have available.



3 you can more or less forget about. Unlikely to turn up as an option often and usually it's too much of an ask of your existing contact.

2 is great if you have it, you often won't, but if you do make sure you put future value and the need for access at the heart of the request your colleague makes.

1 is where you're going to spend most of your time and here there are 3 points:

- A. Think of gaining access to stakeholders as a campaign, not an event
- B. Deliver clear value for your existing connections before you ask them to connect you elsewhere
- C. Once again put future value and a clear need for access at the heart of the request your customer contact makes to person you want to connect with.

### **3.4 Build And Execute An Access Strategy : Update Your Stakeholder Map**

We've covered a lot over the last 3 sections. Don't try to keep this in your head.

Define a standard way of simply mapping your customer stakeholders (remember our three point approach), get into the habit of updating it either every time you learn something new or you are about to meet with any of the stakeholders.

Put the map in a system (CSM platform, CRM, Google sheet) and give access to anyone who can help you keep it updated or execute on the actions you've defined to build out your connections.

Embed your plan in this map, who you are working with, what matters to them from a value perspective, who they can connect you with, who connects to them, your next actions and so on.

Above all - don't try to keep this in your head. Did we say that already?

## **4. The Big Picture : Make Every Interaction World Class**

Perhaps the most important aspect of meeting with your stakeholders, especially senior stakeholders at your customers is to make every interaction as effective as possible.

At points like this in sentences like these you often see the words world-class.

You may not reach it every time (or ever - it's a high bar) but when you are meeting with senior stakeholders, for example in an EBR, you should be aiming to deliver at your highest possible standard. Over the rest of this section we'll look at 4 aspects of this including:

- Understanding the potential of every interaction you have
- Have a clear plan for every conversation and ensure you then
- Prepare, prepare, prepare
- How doing all this allows you to bring an agility of mind to the meeting that enables you to deliver to the best of your ability



#### **4.1 Make Every Interaction World Class : Understand The Potential**

It won't surprise you if I return to the theme of value and outcomes when talking about the potential of every interaction you have with your stakeholders. You will touch on other topics but wherever you can aim to discuss and progress the value delivery for that stakeholder and the customer they represent at every meeting.

And, and this is crucial, aim to take value for yourself from every meeting.

Be that a commitment to allocate resource, resolve an issue, deliver a message or make an introduction, you can and should aim to use every meeting as a way to advance your ability to deliver value to your client by asking them for the help you need to do that as effectively as possible.

#### **4.2 Make Every Interaction World Class : Have A Conversation Plan**

Seems obvious but there are several aspects to this you need to consider. What do I want to communicate, demonstrate? This may be value delivered, issues resolved, product previews, expansion proposals and so on. How best do I communicate this content? What questions could I ask the audience to allow them to show they have understood.

What do I need to learn? Where does the customer want to go next with our solution, what's the next chunk of value they are best positioned to unlock with our support? What needs to be done by them and by us to make this happen? This is the perfect scenario for preparation. Have your questions and existing content around value ready to start and drive forward this conversation.

What do I want to get from the customer? How best can I present that request? Can I prepare some questions that open up the area for discussion and allow the request to develop naturally from the conversation? What objections might come up, or sticking points?

For each of these points how do I actually hold the conversation? At Success Methods we have our P->ACED structure for planning and executing a great meeting conversation. A little more on that later.

#### **4.3 Make Every Interaction World Class : Prepare, Prepare, Prepare**

Preparation is the ace up your sleeve. You have total control over how you prepare, when you prepare and how much you prepare. Good preparation gives you a head start in every meeting, the best possible start if you truly invest in it.

Yet we often overlook it, fail to invest in it or do it half-heartedly. The irony is the stricter you are with your preparation efforts the freer you will be when the meeting starts and therefore the more likely you are to be able to flex with the discussion giving yourself to best chance of reaching the optimum conclusion. In summary. Prepare, prepare, prepare!

#### **4.4 Make Every Interaction World Class : Execute The Perfect Meeting**

You've prepared, you know what you want to show, what you want to learn, what you want to request and what you want to share with your stakeholder. In any





interaction you'll have one or more of these you want to work through. At Success Methods we believe you'll do best if you have a structure in mind for the conversation in addition to a clear plan for the content to be discussed.

For this we've developed our simple P->ACED structure:

- Prepare
- Assess
- Confirm
- Explore
- Decide

Other models for effective conversation / meeting management are available. For optimum results make sure you're using something to keep you firmly on track during the discussion.

Good preparation, a good plan at your fingertips and a simple mental model to keep you on track during the meeting = an agile mind free from anxiety.

## **5. The Big Picture : Building Sustaining Relationships**

Your first stakeholder meeting, with any stakeholder, is the beginning of the beginning. The start, you hope of a productive relationship. It may be you can do all you need in a short series of meetings and move on, perhaps keeping in touch from time to time.

But, with many stakeholders your first meeting will set the tone for a relationship that, you expect, will bring value to both parties. So, let's assume you've secured, prepared for and then nailed the delivery of your first EBR. What's next?

Over the final part of this guide we'll cover the 4 essential elements of building a long term, sustaining relationship that happen between the actual meetings or conversations:

- Setting up keeping in contact
- Following up like a boss
- Making checking in a superpower
- Managing change in the stakeholder landscape

### **5.1 Building Sustaining Relationships : Setting Up Keeping In Contact**

What are the critical steps to take at the end of a stakeholder meeting that set you up to keep in touch with the expectation of future meetings? First thing to note, the end of the meeting, when you are face to face with stakeholder is the time to make plans. Don't be tempted to put it off with a casual "I'll drop you a line with next steps". Get the commitment then and there.

First of all summarise the meeting, the key agreements reached, open points that still require agreement and the next steps agreed during the course of the



discussion. Indicate that you'll issue a written summary confirming what you've just said and had agreed.

Second, close out the open points by agreeing a plan that leads to additional next steps you agree and add to your running list.

Quickly work through the next steps. Make sure an owner is identified for every next step. If you need to be put in touch ask the stakeholder to do that as soon as they can. Where you can get commitment to dates.

Based on what you've just discussed propose the next meeting. It might be, if you are in an EBR, that there's no need to meet again until 3, 6, 12 months have passed when the next EBR is due. But if you're working a set of actions then based on the dates you've agreed set a next meeting at a time that would be appropriate to get together to continue to drive these forward. If you've just confirmed a set of actions, owners and dates then proposing a next discussion aligned to them is a sure fire way to get agreement to that next conversation.

This might seem like a lot to keep track of. If it does, make sure you go into your meeting with a simple way to make the notes you need. You can refer to this when you summarise the meeting and use it to ensure everything is captured. As a bonus you look like you mean business.

### **5.2 Building Sustaining Relationships : Following Up Like A Boss**

Following up like a boss means do one thing, very well. What's that one thing?

It's everything you said you'd do plus a little extra. Most people are too busy or sometimes too dis-organised even sometimes too lazy to get to everything they said they would do. So by doing that, promptly, accurately and effectively you'll already stand out. Add in a couple of bonus items (for example send over a paper you've found that'd directly relevant to your last or next discussion) and you'll move well ahead of the crowd.

And when we say do everything, that means get it done. It doesn't mean have a go and turn up to the next with a bunch of excuses. It means find a way to get it done.

### **5.3 Building Sustaining Relationships : Make Checking In A Superpower**

There is a simple rule – only check in with added value. Your customers are likely busy people, if you call just to say hello and how are you getting on, you won't achieve much. They might like the thought with the first one but not regularly.

A quick check-in with a customer will be a better conversation when you have a reason: an easy to describe customer benefit, an update on resolving an issue, news about a desired new feature, or a great new best practice driving value elsewhere.

These check-ins should be determined by the reason not by a schedule. This can be hard but can be helped by having your product designed with customer value in mind. If, for example, your product can alert you to the usage of your product by



customers and highlight to you where they could get more value this will truly allow you to make checking-in a superpower.

#### **5.4 Building Sustaining Relationships : Managing Change In The Landscape**

Having worked hard to get, execute and maintain your stakeholder relationships, you need a plan to ensure the departure of a stakeholder doesn't derail your relationship with your customers. The key to this plan will come as no surprise to you, it involves proving the value you create for your customer. If your Owner leaves your customer, getting an opportunity to meet with the replacement will be easier if you are delivering value. You'll be much more likely to be connected onward to the next stakeholder allowing you to have an early strategic conversation with them on their plans.

Conversely if you either can't prove or aren't providing value even if you get the meeting, it'll be much harder to maintain that relationship subsequently. The new stakeholders is much less likely to have the interest.

The key of course is to act quickly if you are surprised by a change, by having a plan in place for this situation that allows you the best chance to quickly establish the new relationship. Even better, if you are checking in regularly with value at the heart of the discussion there's a great chance you'll hear about the change from your existing stakeholder long before it happens.

And don't forget the departing stakeholder. Maintaining a relationship with them could prove very valuable in the long term.

#### **Where Is The Love : Wrapping Up**

And so we come to the end. Matt and I hope you have thoroughly enjoyed this guide to creating stakeholder delight and that you'll take away at least one thing that helps you improve the way you work.

If you've found it valuable you may enjoy one of our courses:

[Mastering Professional Conversations](#)

[Mastering Customer Success](#)

Mastering Stakeholder Management - **Coming Soon!**

**They are all available at <https://academy.successmethods.uk/>**

Best

Ian & Matt.