



Stakeholder Circle™

Using the *Stakeholder Circle®* Software

Part 4: Data input: Step 1 – Identify



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Download additional parts of this manual from:

<http://www.stakeholdermapping.com/stakeholder-management-software-and-tools/98/>





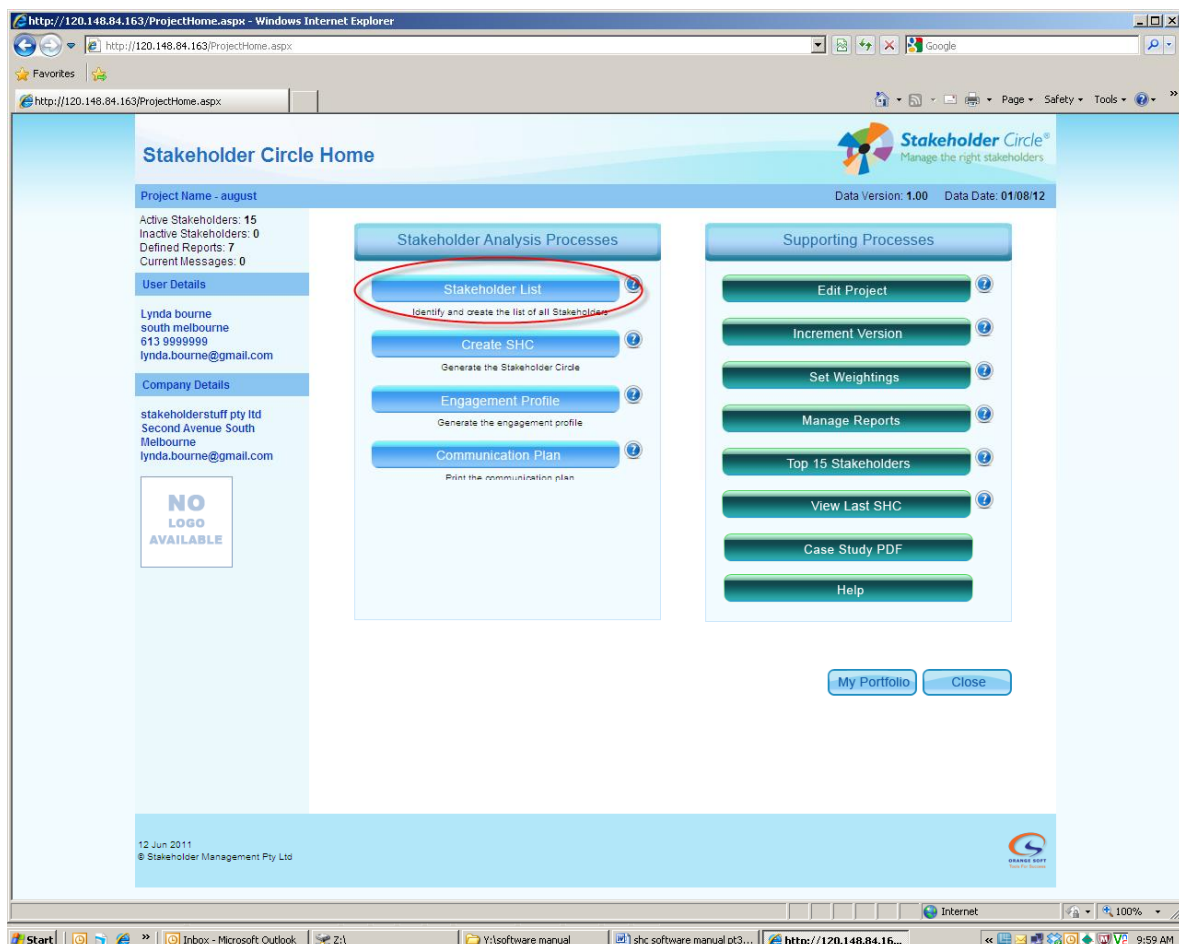
Step 1: identify

First develop your list of stakeholders. For best results you should use a small team of people (3 - 5). Ideally it should include the project manager or leader of the team, one core team member and the Sponsor, or someone who understands the power relationships within the organisation.

For best results you need the name and role of the group or individual; their influence on the work . upwards (U:senior managers), downwards (D:the team), sideways (S:peers of the team leader); outwards (O: outside the project); and whether they are internal (I) to the organisation or external (E).

To enter stakeholder data:

Select 'Stakeholder List'.





Select new stakeholder

And begin to enter information about the groups and individuals you have identified who: *can impact the work or who are impacted by the work. This is the definition of 'stakeholder'*

Name Name of stakeholder

Role Project role of stakeholder

Direction U, D, S, O, and I or E

Significance to project: Why selected

Importance to project: Contribution

Requires from project: Expectations: what does stakeholder expect to gain from success (or failure) of this activity).





Classifications: define unique subsets based on areas or functions, or some other aspect to support further reporting. The list is editable.

To continue entering stakeholder data, select **save & new**

To finish for now and return to **main menu** select **save** or **close**

The screenshot shows a web browser window displaying the 'Add/Edit Stakeholder Information' form. The form is titled 'Add/Edit Stakeholder Information:' and has a 'Close' button in the top right corner. The form fields are as follows:

- Name:
- Role:
- Direction: ☒ Upwards ☐ Outwards ☐ Sideways ☐ Downwards (Upwards(eg.Management))
- ☒ Internal ☐ External (The stakeholder is a part of performing organization's management and staff structure)
- Significance to Project: (Has a legal title to an asset or a property affected or user by the project)
- (Has an interest in, or is affected by the project outcomes)
- Importance To Project:
- Requires From Project:
- Classification1:
- Classification2:
- Comments:
- Is Active: ☒ Active ☐ Inactive

At the bottom of the form, there are three buttons: 'Save & New', 'Submit', and 'Cancel'. The 'Save & New' button is circled in red. The footer of the form says '© Stakeholder Management Pty Ltd'.





This image shows a list of 15 stakeholders from step 1: *identify*. It is important to review data for accuracy. Select **save** when completed.

Stakeholder Identification: august

Main Menu New Stakeholder Help Show All Active Show Inactive

Sort By Number Name Direction Int/Ext Priority Classification1 Classification2 Print List Print Reports

Edit Process: ☒ Identification ☐ Prioritize ☐ Engage ☐ Communication ☐ Manage Issues ☐ History

Name	Classification# 1	Classification# 2	Priority	Open Issues	Total Reports	Engagement Index	Status	View Full Details
Edit Miles Green	Team	None(No ac...	1	0	0	0.00		Details
Edit Emily Brown	Snr. m'men...	Area 3	2	0	0	0.00		Details
Edit Fred Orange	None(No ac...	None(No ac...	3	0	0	0.00		Details
Edit Rose White	Snr. m'men...	None(No ac...	4	0	0	0.00		Details
Edit Steven Smith	None(No ac...	None(No ac...	5	0	0	0.00		Details
Edit Nick Frederick	None(No ac...	None(No ac...	6	0	0	0.00		Details
Edit Maria Johnson	None(No ac...	None(No ac...	7	0	0	0.00		Details
Edit Carlos Guitano	None(No ac...	None(No ac...	8	0	0	0.00		Details
Edit Martin Sanders	Team	Area 3	9	0	0	0.00		Details
Edit Chang Ellen	None(No ac...	None(No ac...	10	0	0	0.00		Details
Edit Kanye West	Customers	None(No ac...	11	0	0	0.00		Details
Edit Andrew Johnson	Suppliers	Area 5	12	0	0	0.00		Details
Edit George Jones	Customers	None(No ac...	13	0	0	0.00		Details
Edit Joan Blue	None(No ac...	None(No ac...	14	0	0	0.00		Details
Edit Patrick French	None(No ac...	None(No ac...	15	0	0	0.00		Details





If after reviewing the list you need to change something, select **edit** for the record that needs to be changed.

And select **submit** when you have completed the task of entering stakeholder data.

The screenshot shows a web browser window displaying the 'Add/Edit Stakeholder Information' form. The form is titled 'Add/Edit Stakeholder Information:' and has a 'Close' button in the top right corner. The form fields are as follows:

- Name: Joseph Cotton
- Role: subject matter expert on secondment
- Direction: ☐ Upwards ☐ Outwards ☒ Sideways ☐ Downwards (Sideways (eg Peers))
☒ Internal ☐ External (The stakeholder is a part of performing organization's management and staff structure)
- Significance to Project: Knowledge (Has project (technical) or organizational knowledge needed by a project)
Interest (Has an interest in, or is affected by the project outcomes)
- Importance to Project: Power to affect success of the work
- Requires From Project: Career advancement
- Classification1: None (No action required)
- Classification2: None (No action required)
- Comments: (empty text area)
- Is Active: ☒ Active ☐ Inactive

At the bottom of the form, there are three buttons: 'Save & New', 'Submit', and 'Cancel'. The 'Submit' button is circled in red. The browser window shows the URL 'http://120.148.84.163/StakeHolder.aspx' and the Windows Internet Explorer interface.

The records appear in the order that they are entered: once Step 2: *prioritize* has been completed the list will be sorted into the current rankings of important stakeholders. To take full advantage of the power of the tool and build the Stakeholder Circle map in Step 3: *visualize*, a minimum of 15 stakeholders must be entered. There is no maximum . but the Stakeholder Circle map will only show the top 15.

