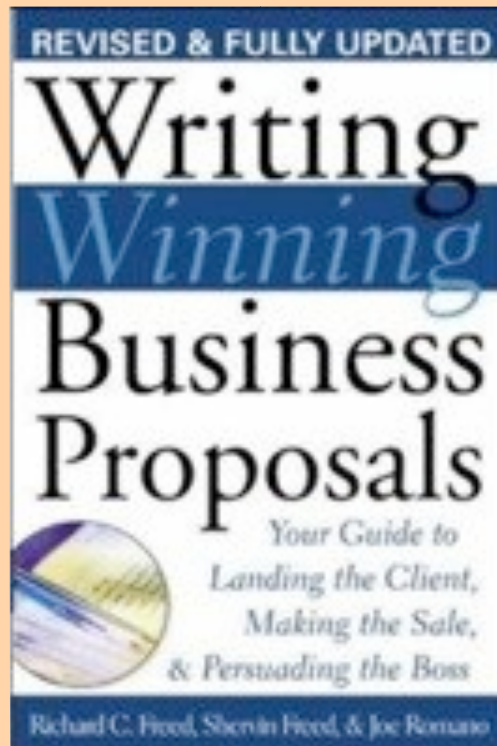


# Using a Stakeholder Matrix

*A Framework for Improving Your Positioning During the  
Pre-proposal Effort and the Engagement*

Richard C. Freed



For Readers of *Writing Winning Business Proposals*

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## Overview of the Stakeholder Matrix

A stakeholder matrix (Figure 1) is a visual display that helps you make strategic decisions to effect change. Otherwise known as a "relationship matrix," a "relationship map," or a "stakeholder map," the chart identifies:

- relevant stakeholders
- the relationships among stakeholders
- the intensity (i.e., strengths) of those relationships
- the stakeholders' positioning on two axes that reveal the extent of their beliefs

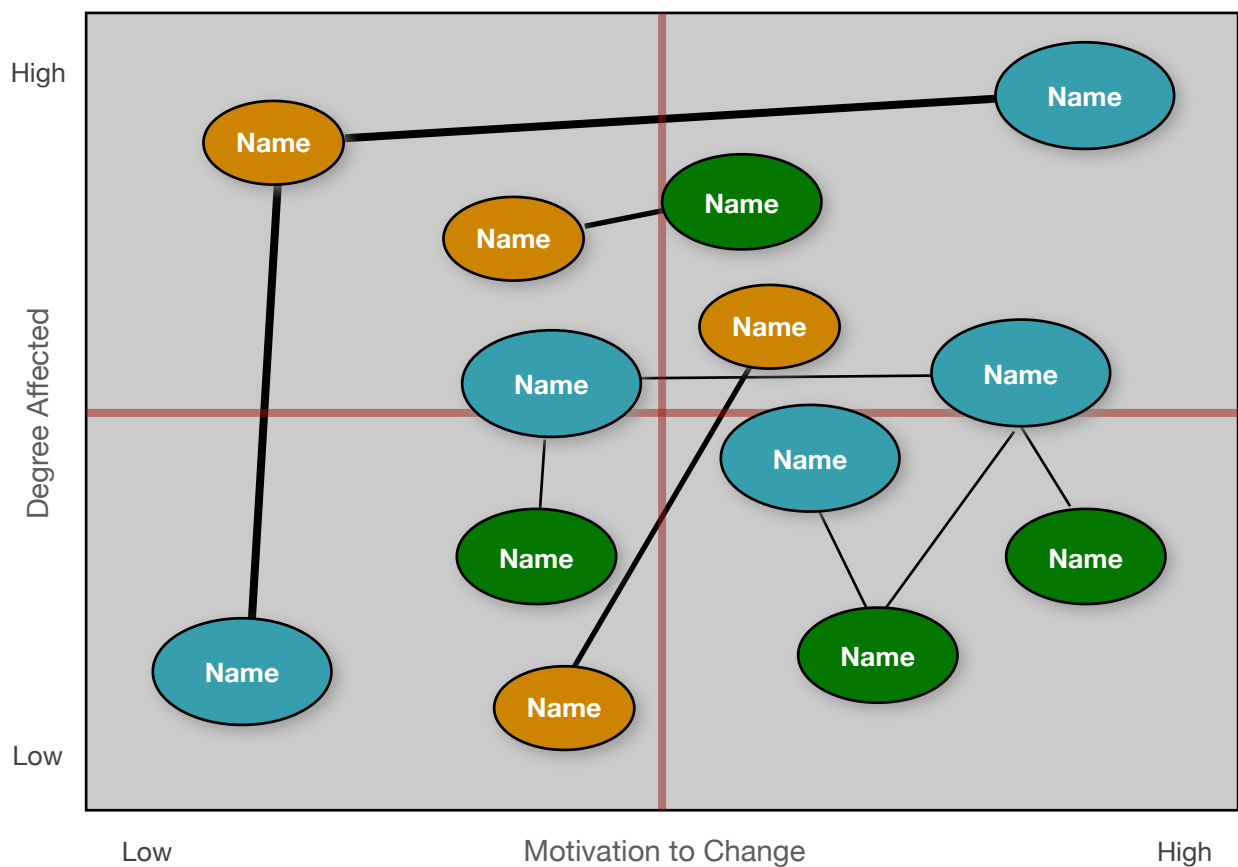


Figure 1. A Simplified Stakeholder Matrix

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## Characteristics of the Stakeholder Matrix

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The list below identifies some of the elements of the stakeholder matrix in Figure 1 (as well as two other elements that could be used).

- Each oval represents a stakeholder—an individual or a group of individuals.
- These individuals or groups are plotted on a 2 x 2 matrix according to their beliefs about two values, one for each axis.<sup>1</sup>
- Depending on the situation and which beliefs you wish to plot, any values can be used. Figure 1 happens to use these two values: the degree to which stakeholders believe they will be affected positively by the projected change and the extent to which they believe they are motivated to change.
- The size of each oval represents the individual's or group's **power base**.<sup>2</sup>
- The thickness of each line connecting two ovals represents the intensity or strength of the two stakeholders' relationship. "Relationship" can be defined in any way that's most strategic. For example, a relationship could be based upon personal history, family affiliation, or power (i.e., "pecking order").
- Within each oval could be placed the stakeholder's **hot buttons**.
- Within each oval could be placed the stakeholder's **receptivity** rating.

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<sup>1</sup> Of course it's important to remember that their beliefs are really your beliefs, your interpretation, of what they believe.

<sup>2</sup> All bold-faced words in reddish text are defined in the downloadable document "Glossary"

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## Uses of the Stakeholder Matrix

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### A Stakeholder Matrix has Two Purposes

- *The first purpose is to help you understand the field of play*—that is, to understand all the stakeholders' positions on the field as determined by their beliefs related to the two axes.
- *The second purpose is to influence how the game is played*—for example, by employing one stakeholder to influence another stakeholder with the intent of moving the latter into or further towards the upper-right quadrant, which in 2 x 2 matrices is the preferred positioning.

To illustrate the second purpose, consider Figure 1, and note the following:

- In the upper-right quadrant is a stakeholder (call her "Stakeholder 1") who has a high powerbase and a strong willingness to change. If you yourself have a strong relationship with this stakeholder, you are in an advantageous position.
- Stakeholder 1 has a very strong relationship with a low-power base stakeholder (call him "Stakeholder 2") in the upper-left quadrant.
- Stakeholder 2 has an equally strong relationship with a stakeholder (call him "Stakeholder 3") in the lower-left quadrant.
- Stakeholder 3 presents an enormous problem and a significant vulnerability. He has a high powerbase and has very little motivation to change.
- Concerning Stakeholder 3, only one situation could make matters worse: if you and your team have no relationship with Stakeholder 3 and therefore have no direct influence on his beliefs. Assume that such is the case.

Given the stakeholder matrix in Figure 1, you can identify an important strategy: Use Stakeholder 1 to influence Stakeholder 2 to persuade Stakeholder 3 that the project will indeed affect him positively, thereby increasing his motivation to change.

### Stakeholder matrices can be used strategically for more than just proposal development

*During the proposal-development process*, your goal (infrequently achieved) is to have every **buyer** on the selection committee in the upper-right quadrant. Your task is to influence each of them so that they believe they will be positively affected by the proposed change and highly motivated to change (and of course to employ you as the agent of change).

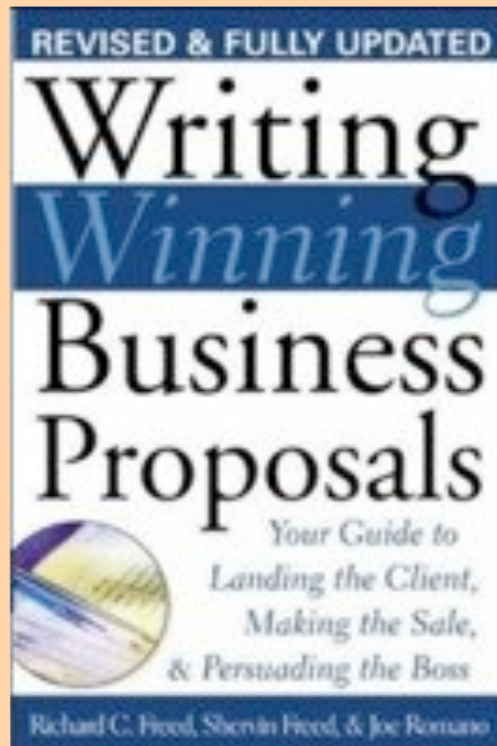
In a proposal effort, you desire to sell your services; in an engagement, you desire to sell your ideas, your recommendations. *During and at the end of the project*, therefore, and regardless of what beliefs you wish to plot, your task is to influence every decision maker so that they are in or at least close to the upper-right quadrant.

***During account planning***, you need to recognize the limitations of organization charts, which tell you very little about people's relationships and powerbases in the organization. If you are attempting to establish or already have established an account relationship, you can use stakeholder matrices to map key players' relationships, hot buttons, and powerbases, as well as their receptivity to your firm. Once you have defined that field of play, you can plot (pun intended) strategies to influence how the game is played.

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