



HOW TO...

MANAGE STAKEHOLDERS AND VAGUE OR EVER-CHANGING EXPECTATIONS

As training designers, it's not usually us who instigates the training or have final sign-off of the solution. We have to consult with various stakeholders, balance multiple needs, tease out what's REALLY needed, use our knowledge and experience to influence the outcome and balance the egos of everyone involved AND STILL create a training experience that will work.

It's a tough ask, and not nailing down the outcomes or identifying stakeholders (and their role) early on can drag out the design process, leave you going around in circles and ultimately may lead to a solution that satisfies no-one.

Although it will never be a completely smooth process if more than one stakeholder is involved, here are some tips for making it easier.

1. **Clarify the ultimate aim.** Get as many stakeholders together at the start in a focus meeting to specify the aim of the training. Make sure it is clear and realistic. What change are we expecting to see as a result of the training. Get everyone signed up to this. This is your guiding star, and you can refer back to it when additional requests come in later, asking them how it aligns with this.
2. **Be creative with your analysis and research.** Often stakeholders don't know how to describe what they want. Use different questions and methods to help the to articulate the outcome they are seeking. Is it something they can measure with numbers, see with their eyes or get feedback about?
3. **To help them to articulate what they expect, ask for examples.** What previous training/materials do they think worked well, and not so well? Why was that? Can they show you anything? Sometimes getting them to tell you what they DON'T want can be just as useful as what they DO want.
4. **Educate stakeholders about what training can and cannot do.** Sometimes a change in process, communication or performance management will be far more effective in bringing about the change they desire. Tactfully explain what impact any training will (and won't) have so that they don't expect a half-day course to change the world!
5. **Create an outline** to share with the stakeholders before you start detailed design. Show them that you have listened to and reflected their ideas. Sell them your solution (but make sure you aren't too invested in it!). Often stakeholders don't know what they want until they see an outline. At this point, it's easier for them to say what they want/don't want. Allow for any tweaks and then use this as your blueprint for detailed design. This is covered in [How to Design a Course Outline](#), and in detail on the [Plan a Training Session](#) course.





6. **Get a single point of contact.** If at all possible, ask for one person to liaise with you and co-ordinate the input of others. This will limit the amount of re-work and amends that you will have to do. This is particularly important if you are external to the organisation.
7. **Identify the different roles of the various stakeholders.** Many subject matter experts will be advisors and should be listened to. Some will have influence in terms of getting buy-in or organising practicalities – they will need to be kept informed. Some (hopefully only one or two) will be decision makers. Use [RACI](#) or [RAPID](#) to help identify who should be doing what.
8. **Set out a process with clear check points.** If people know they are going to be consulted and when that will be, it allows them to relax a little. So show them the training design process, set up review meetings early on and tell them what you need from that at each sign off.
9. **Communicate regularly.** Sometimes things DO change and so amending the design of the training is completely justified. The sooner we know about it, and the better we understand the context, the easier it is to integrate. Of course, sometimes an issue that seems like a big deal turns out not to be, so a mention or a signpost to additional support/resources may be all that's necessary. Discussing the new/different content in relation to the agreed aim will help to keep things in perspective.
10. **Be open and curious.** When changes are requested, be curious and find out WHY. Take a consultative approach to understand why the change is being requested and maybe offer an alternative way of dealing with the challenge. Ultimately, we have to be guided by our stakeholders BUT they need to understand the implications of the changes they request, and that there may be a simpler way.
11. **Consult and negotiate.** Some changes will mean the design will fall behind and this may affect the delivery date (or costs). Stakeholders may not appreciate that what appears to be a small change means that lots of elements have to be re-written/recorded, so identify if the change necessary or is it a nice to do? Doing a cost-benefit analysis may be worthwhile
12. **Point out any contradictions.** If one requested change seems to directly conflict with something else that has been agreed or included in the course, we need clarification. Often the stakeholders guiding the design won't see the full picture as you do (why would they?) so bring them up to speed and see it as a problem-solving exercise rather than a criticism.
13. **Check with your main point of contact** before making any changes. Some people will try to bypass the agreed process (or have forgotten that it's there) so take any requests to your single point of contact and discuss them together.
14. **Don't take it personally.** In businesses, things DO change, and sometimes quickly. We have to be mindful of pandering to whims and where possible, keep the main things fixed. But the details will change and we have to be ready to accommodate that.

