Stakeholder Management

ADVISING UPWARDS:
MANAGING THE PERCEPTIONS AND EXPECTATIONS OF SENIOR MANAGEMENT STAKEHOLDERS

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Purpose of the paper

The purpose of this paper is to provide a framework for assisting individuals in organisations to understand how to engage their senior stakeholders. The framework is developed through defining relevant theoretical constructs and then applying the theory to organisations through the use of case studies. Conclusions drawn from these case studies will provide practical guidance to those individuals in organisations who need to engage senior stakeholders to obtain the support essential to the successful delivery of their outcomes.

Design / methodology / approach

A combination of theory and organisational experience codified into case studies leads to the development of a framework to guide individuals in organisations to better understand and engage senior stakeholders. The framework includes approaches for building and maintaining the robust relationships with senior stakeholders needed to achieve successful outcomes for the organisation's benefit. The main method for the research is a descriptive case study to test the theories described in the paper.

The approach to the topic is based on reflection of the experiences of the author and colleagues, tied in with theories developed by the research of individuals in the field of leadership and organisational strategy. The result is a framework to provide guidance to practitioners working in organisations and a new approach for researchers in organisational management and stakeholder engagement.

Findings

While there are many journals and books devoted to assisting management to lead and motivate staff and team members, there is an absence of research and thinking on how staff and team members may gain the attention and support of their managers. This paper seeks to address this gap. The problem has been expressed in terms of the experiences of the author and colleagues and has been received with interest by those individuals who have attended workshops and presentations given by the author on this topic.

Research limitations / implications

The description of the problem to be addressed and the analysis and solutions proposed are based on the experiences and reflection of the author and colleagues. Additional research needs to be conducted to further support the conclusions drawn from the ideas in this paper.

Practical implications

Significant changes should be made in the thinking of staff and team members in their approach to acquiring and maintaining the support of their managers. The recommended approach is a structured process of stakeholder engagement based on building and maintaining robust relationships with important stakeholders leading to the development of timely, appropriate and effective communication. The focus of this paper is on all levels of management in an organisation. The focus is also on the concept of 'advising' upwards rather than managing upwards to encourage a more proactive view of the approaches necessary to achieve the appropriate level of engagement with senior stakeholders.

Value of paper

The paper and the ideas expressed within it take a different approach to most of the published literature in that they seek to view organisational culture and practice from the perspective of staff or team members (followers) and how they might proceed to address issues that require management attention and support. The framework and approach should be valuable to all those individuals and teams who need to build and maintain supportive relationships with their managers at any level in the organisation to ensure the ultimate success of their work. This framework is applicable to all organisational activities.

Abstract

Senior functional managers in an organisation have usually attained those positions by displaying aptitude for operating within the corporate 'jungle'. This aptitude covers the ability to quickly recognise 'potential enemies' use 'pre-emptive strikes' to 'neutralise' competition, and use the precepts of command and control to manage the output of their people. However, once these managers reach the highest levels of an organisation the requirements of the executive role change from command and control to leading and motivating. Many executives find changing the habits of a working lifetime difficult.

Research, and the experience of the author and colleagues, has shown that one critical factor in creating successful outcomes for an organisation is the active support of senior stakeholders, particularly the sponsor. Successful managers not only understand this but also understand the need to ensure that their senior stakeholders understand and fulfil their support roles. This requires the manager to be skilful at *advising upwards*, using effective stakeholder management techniques and appropriate information to engage the support of senior executives and to manage their expectations. Effective communication can help change perceptions and expectations of unsupportive stakeholders (to make them realistic and achievable); as well as helping gather the required support.

Case studies based on the experiences of the author and colleagues working in a large, traditional organisation will be used to define the framework and actions needed to turn a commander into a sponsor. The essential tools will include developing and utilising influence networks, targeted communication strategies and plain persistence.

Paper type: theoretical concept, case study descriptions and practitioner reflection.

Keywords: stakeholders, effective communication, organisational activities, management theory, stakeholder theory, project management.

Introduction

Senior functional managers in an organisation have usually attained those positions by displaying aptitude for surviving in the corporate 'jungle'. This aptitude for survival includes the ability to recognise potential 'enemies', use 'pre-emptive strikes' (Lakoff and Johnson 1981) to neutralise competition and use the precepts of command and control to ensure the required outputs are delivered

(Talbot 2003). When these senior managers become executives and are appointed to the senior leadership team, their skills and behaviours need to be more focussed on motivation, support and leadership rather than command and control (Watkins 2003). Many newly-promoted executives find changing the habits of a working lifetime difficult to achieve (Goldsmith 2007).

Studies have consistently shown (Englund and Bocero 2006; Crawford and Brent 2008), that the active support of stakeholders from the senior leadership team, particularly the sponsor, is a critical factor in creating successful outcomes for organisational activities. Successful managers not only understand this but are also willing to do whatever is necessary to ensure that their senior stakeholders understand and fulfil this support role (Cooke-Davies 2005). This requires the manager to build and maintain robust relationships (Pinto 2000; Bourne 2009), and focus on engaging the support of executives through targeted communication based on managing their expectations (Oschadleus 2004; Bourne 2010). Effective communication helps change perceptions and helps adjust expectations to make them more realistic and achievable (Cole 2000; Carlone 2008), as well as helping to acquire the ongoing support necessary for successful outcomes (Quirke 2009; Wright 2009).

Two case-studies will be used to describe typical situations that require a focus on *advising upwards*. These case studies will define the framework of the *command and control* school of traditional management practice, providing the foundation for discussion of the techniques that will assist moving management thinking and practice towards the *sponsor* school. The case studies will also show the importance of experience and leadership for successful delivery of work in organisations.

While the case studies are based on projects and programs funded and approved by the organisation to deliver its current business strategies, the frameworks described to support *advising upwards* within organisations will also apply in any activity funded and approved by the organisation. They will include:

- Strategic activities: to deliver against the stated business plan for that reporting period. This may require:
    - Development of new marketing, product or service strategies;
    - Internal organisational change or improvement,
    - Long-term response to changes in the business strategy because of changes to the industry;
    - Responses to changes in the environment, whether business environment or natural environment,
    - New or adapted process and practices to meet new competitive threats or opportunities;
    - Changes to adjust to changes in Government policies;
- Operational activities: business as usual – whatever actions are needed to ensure effective and efficient delivery of the organisation's strategic objectives;
- Tactical or adhoc activities: dealing with current issues or short term objectives. Sometimes this will be in the nature of a collection of projects or programs that together will deliver the organisation's strategy; sometimes this will take the form of dealing with unexpected issues or crises (Bourne 2009).

This paper focuses on the critical management survival skill of engaging senior managers, and of *helping them help you* within the context of any type of organisational work. In this paper the term 'manager' will refer to the manager of the activity whether it is strategic, tactical or operational, and the term 'senior stakeholder' will refer to the class of stakeholder that has been defined in the stakeholder analysis process as influencing the work or outcomes of the activity from an *upwards* direction.

It is organised as follows: firstly a brief overview of stakeholder management theory and then a focus on senior management stakeholders. The second section explores aspects of *advising upwards* – the theories that have developed the culture of organisational leadership and the demands of decision making in today's competitive environment. This section is followed by the case studies and through them an exploration of ways to secure and maintain the engagement and support of senior stakeholders and application of the theory defined in the second section.

Advising upwards

Stakeholders – who and why

Stakeholder management methodologies provide guidance in understanding and managing the expectations of stakeholders. In early work on stakeholder theory, (Freeman 1984) gave the idea of stakeholders legitimacy by defining stakeholders as an important class within any organisation. 'Organisational wealth' can be created (or destroyed) through relationships with stakeholders of all kinds, therefore *"managing relationships with stakeholders for mutual benefit – is a critical requirement for corporate success"* (Post 2002:1) . This aspect of value creation means that stakeholders themselves can benefit from the value creation or be adversely affected (Schneider 2002), or bear some sort of risk (Clarkson 1994). The relationships themselves are essential for organisational success (Leana and Rousseau 2000) and as the best way of coping with environmental turbulence and uncertainty (Savage, Nix, Whitehead and Blair, 1991). Going beyond the idea of value creation, stakeholder relationships can be considerable assets contributing knowledge, insights and support in shaping a project brief as well as supporting its execution (Bourne and Walker 2005), but require "consensus from a plurality of key stakeholders about what it should be doing and how these things should be done" (Savage, Nix et al. 1991:61). For successful outcomes, the manager must know how to work within the organisation's cultural and political environment to ensure the *important* relationships are managed and thus ensure that all stakeholders have their needs met. (Pinto 1998; Post, Sauter-Sachs 2002; Bourne and Walker 2003; Bourne and Walker 2005). It is important to reflect on what stakeholders will do to achieve, promote, or protect their stake. These views about the importance of stakeholders when combined provide a broad platform on who are stakeholders and how best to engage them to increase the chances of success of the work (Bourne 2010).

Methodologies developed to understand and manage essential relationships with stakeholders must provide support for the holistic view of 'stakeholder' defined above. Highly regarded methodologies have been developed which include a focus on the situation and the issues (Savage, Nix et al. 1991), strategies for action (Clarkson 1995) from ignoring or fighting the stakeholder's issues, through to proactive anticipation of the stakeholder's needs, classifications based on power to influence, the legitimacy of each stakeholder's relationship, and the urgency of the stakeholder's claim, with appropriate actions depending on that classification (Mitchell, Agle and Wood 1997). Rowley (1997) defined a useful tool for visualising power and influence patterns in social network mapping. No one methodology can act as a 'boiler-plate' for managing stakeholders (Phillips, Freeman and Wick 2003) and a structured but flexible methodology that incorporates the features of all these methodologies will probably be most effective. From the methodologies and techniques discussed above to identify key stakeholders and their influence patterns, a visualisation of stakeholder, influence and impact can now be constructed incorporating the important aspects of these methodologies. The concepts of *power, legitimacy and urgency* (Mitchell, Agle et al. 1997) are valuable for identifying important stakeholders, as is the idea of centrality and density from Rowley (1997) for attempting to recognise and show the power and communication ties within the stakeholder community. These features have been built into a structured but flexible methodology – the ***Stakeholder** Circle®*.

The ***Stakeholder** Circle*®, developed during the author's doctoral research (Bourne 2005) provides a 5-step process to identify, prioritise, visualise, engage and communicate with *stakeholders that matter*, and then monitor the effectiveness of that communication. Stakeholders are defined as: *Individuals or groups who are impacted by, or can impact, the work or its outcomes* (Bourne and Walker 2008) and incorporate the wide-ranging definitions summarised previously in this paper. This definition describes a wide group of potential stakeholders and implies that the large numbers of groups and individuals selected in any identification exercise will have to be further analysed.

The underlying principle of the ***Stakeholder** Circle*® methodology is that the community of stakeholders will change as the work moves from planning to implementation, and as the structure of the performing organisation changes. The ***Stakeholder** Circle*® methodology is examined in detail elsewhere (Bourne 2009): for this paper it is sufficient to describe the five steps which guide the team through all essential activities for identifying the 'right' stakeholder for any time in the lifecycle of the work to be done, and develop the most appropriate communication strategies for engaging these important stakeholders. The five steps are:

- Step 1 – identify all stakeholders and document their expectations;
- Step 2 – prioritise;
- Step 3 - map the current stakeholder community, showing each stakeholder's relative importance, power and influence;
- Step 4 – engage through understanding each stakeholder's attitude to the activity and develop targeted communication;
- Step 5 – monitor the effectiveness of this communication.

Stakeholders' Influence

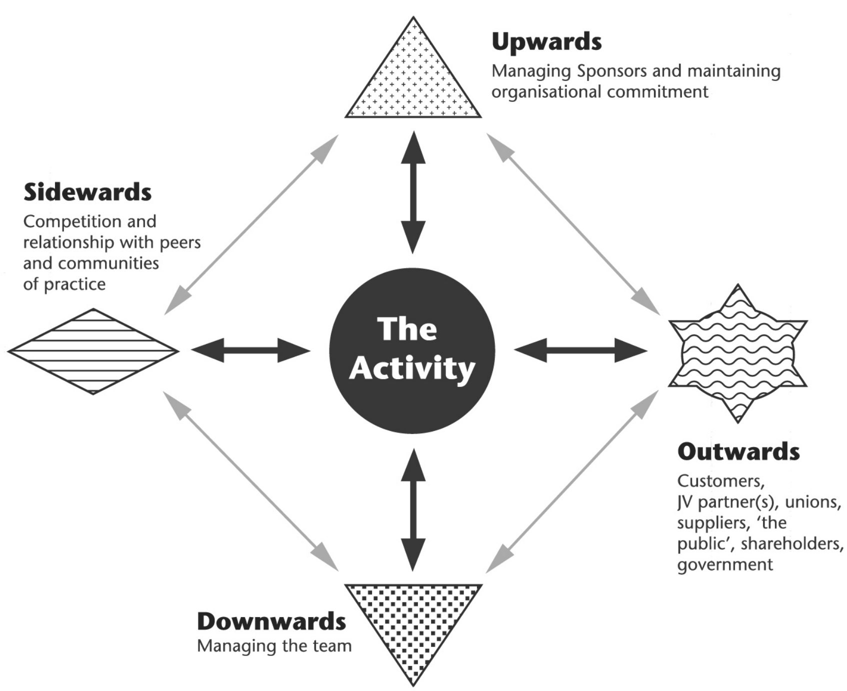

Figure 1 Directions of stakeholder influence

The methodology categorises stakeholders according to *directions of influence*; how they may influence the work or its outcomes, or be influenced by the work or its outcomes. These directions are: *upwards* (senior managers), *downwards* (the team), *sidewards* (peers of the PM) and *outwards* (outside the activity). Managing the expectations and gaining the support of each type of stakeholder depends on understanding how best to manage the relationships described by these categories.

Managing *upwards* is about developing and maintaining robust relationships with those senior managers whose support is vital to sustain organisational commitment to the activity. Managing *downwards* is about managing the team (often overlooked by organisational leadership as being important stakeholders). *Sidewards* refers to the peers of the manager. It defines communication approaches to ensure collaboration rather than competition. Managing *outwards* involves considering the needs and impacts of a large group of stakeholders external to the activity, and often external to the organisation. This group includes a diverse group of people ranging from governments to voters, and clients or customers to suppliers. Each of these *outwards* stakeholder groups will have different requirements of the work or its outcomes.

While all stakeholders identified in this methodology are important, the focus of this paper will be on those *upwards* stakeholders who represent the organisation's leadership team and its commitment to the outcomes of the activity.

Managing (or advising) upwards

Upwards stakeholders may still consider that success equals 'on time, on budget and delivering the specified scope' (the *iron triangle* of the project environment) and that the team must deliver to these criteria (Meredith and Mantel Jr 2000). However, the reality is that senior management stakeholders, particularly the sponsor, must play a far more active and overtly supportive role to ensure a successful outcome (Englund and Bocero 2006). It is part of the manager's role to not only recognise this principle, but also to do whatever is necessary to ensure that senior stakeholders understand and fulfil the requirements of the sponsor role (Thomas, Delisle and Jugdev 2002). This is about creativity in relationship management (Goldsmith 2007): there is no template or checklist to follow, only observation of other more skilled and experienced managers and guidelines such as will be offered in this paper.

The Manager's Dilemma

To understand more about what it means to be an executive in a large organisation, it is important to explore the nature and culture of organisational leadership: what leadership is, what it takes to reach an executive position, and the demands of decision-making in today's competitive environment. This section of the paper will examine some theories of leadership and then examine the reality of the culture of today's leaders and organisational executives. An exploration of the extension of traditional leadership theory in the guise of a description of what it takes to be an effective sponsor will build on this analysis.

The nature of leadership

There is extensive literature on leadership and what makes a good leader. Leadership has been generally defined as an ability to develop a joint vision and to motivate others to commit to that vision through effective communication (Bass and Stogdill 1990; Bass and Avolio 1994; Sweetman 2001). Leaders must exhibit flexibility, adaptability, follower maturity, and motivation (Burmeister 2003), and have credibility (Bennis and Nanus 1985). Leaders must tolerate chaos and lack of structure; they must think strategically and creatively (Zaleznik 1998). Leaders must have followers (Popper and Zakkai 1994; Lloyd-Walker and Walker 2011 in press). Followers' responses to leadership can be emotional (Bennis and Nanus 1985), empathetic (Kayworth and Leidner 2002), or involving 'give and take' (Hersey, Blanchard and Johnson 1996). Leadership is a relationship between leaders and followers: neither can exist without the other (Bennis and Nanus 1985; Sweetman 2001). This relationship is founded on trust and confidence allowing people to take risks, and make changes (Kouzes 2003) and influenced by culture (DuBrin, Dalglish and Miller 2006). Leadership theories generally discuss a progression in understanding of essential leadership qualities (DuBrin, Dalglish et al. 2006). A progression has been recognised as moving from 19th and 20th Century views of leadership as transactional (give and take exchange relationships, such as exchanging money for work) and transformational (changing the status quo through engaging followers with articulation of a vision and inspiring followers to jointly work to achieve that vision), to currently a recognition of a wider understanding of the leadership qualities needed as being 'authentic' (Lloyd-Walker and Walker 2011 in press). Authentic leadership has been defined as enhancing charismatic and transformational leadership characteristics with ethical leadership qualities (Lloyd-Walker and Walker 2011 in press). Personal styles and characteristics for successful leadership have been defined as creativity, analysis and judgement, resilience and persuasiveness (Kinder and Robertson 1994). Other writers have identified energy, self-confidence, integrity and emotional maturity (Yukl 2002); 'emotional intelligence': self-awareness, self-management, social-awareness and social skills (Goleman 2000).

Table 1 summarises the essence of leadership through a comparison of the ideas expressed above. Personal styles and characteristics defined by modern leadership theory as promoting leadership success include a combination of:

- Creativity;
- Analysis and judgement;
- Resilience and persuasiveness; and
- Emotional maturity often described as 'emotional intelligence'(Goleman 2000).

Table 1 Personal Characteristics of a good leader
(Block 1983; Kinder and Robertson 1994; Webster 1994; Goleman 2000; Yukl 2002)

Webster	Kinder et al	Yukl	Goleman	Block
Left brain: • Analysis and judgement • Control	• Analysis and judgement	• Energy	• Self-management	• Introspection • Control • Analysis and judgement
Right brain: • Creative • Spatial • Holistic • Emotive	• Creativity • Persuasive-ness • Resilience	• Self-confidence • Integrity • Emotional Maturity	• Social awareness • Self-awareness • Social skills	• Insight into others' goals and motivations • Creativity • Tenacity

The paradox of leadership

The expectations that organisations and their people have for their leaders as summarised in Table 1 creates a paradox. This paradox is the contradiction of an organisation's requirement of their leaders to be *heroes*, the lone symbolic embodiment of the organisation ***combined with*** the expectation that their leaders will display all the characteristics of leaders described in the section above and be willing to demonstrate those (often contradictory) characteristics. The organisation and the leader's followers expect him or her to be able to empower their people as well as be decisive (Watkins 2003). This is a 'tall order' for any person, no matter how charismatic, strategic, creative, persuasive or emotionally mature. It also assumes that individuals who have attained positions of power within an organisation have all these characteristics.

The leadership virtues described above have emphasised (or developed) the concept of the *CEO as hero*. Jim Collins describes a different way of thinking about leadership (Collins 2001). From his research into the leadership of long-term sustainable organisations – 'what makes an organisation *great*?'- he developed a hierarchy of leadership qualities and characteristics culminating in level 5 leadership. Level 5 leadership is defined as a blend of 'humility and will' that moves a company to sustainable greatness. The CEO as hero equates to Collins' level 4 leadership. This is the paradox of leadership – the qualities that Collins, and researchers over the last five decades, identified for most effective leadership do not necessarily result in the CEO or other executives as being the 'front man' of the organisation or the one who has to make all the decisions, or 'lead the troops into battle'. The level 5 leader is a strategist, recognises the path that an organisation must take for success, but also empowers the management team to meet the challenges.

Newly appointed executives struggle to make the transition to the ranks of the senior leadership team (Watkins 2003). His study of Fortune 500 organisations identified four broad categories of challenges for new executives:

- Letting go of 'hands on' detail and thinking/acting more strategically (*the big picture*);
- Develop new and unfamiliar skills and behaviours in an environment with new rules (*learning on the job*);
- Managing upwards (*they have to do it too!*);
- Balancing early wins with realistic goals (*getting 'runs on the board'*).

The transition strategies that these new executives reported as being successful included:

- Managing upwards through clarifying expectations of key stakeholders on objectives, goals and leadership styles;
- Building alliances and support structures through establishing personal credibility with stakeholders and understanding the culture (of the organisation, but also of the leadership team – the peers of the executive);
- Focus on personal reinvention – substituting skills, values and behaviours not appropriate to the new role with those that were now appropriate.

It is interesting to note that the challenges and transition strategies that the new executives recognised they needed to be successful in their new role are exactly the same as the challenges and strategies that managers within the organisation must use to manage the relationships with these same executives (senior stakeholders)! The qualities of leadership that have been described in this section match the requirements of the executive from the (Watkins 2003) study and provide a starting point for identification of the characteristics that managers of an organisation's work require from a *sponsor*. In an ideal world the sponsor will be comfortable with the qualities of an authentic leader.

The importance of an effective sponsor

The role of the sponsor is seen to be vital to success (Crawford and Brent 2008) even though the roles and responsibilities are yet to be clearly defined or agreed. *Sponsor* is defined in the PMBOK as providing the financial resources for the project (PMI 2008). Researchers (Thomas, Delisle et al. 2002) have defined the sponsor as responsible for decisions and approvals. The Office of Government Commerce (OGC) defines the sponsor role as the interface between ownership and delivery. Characteristics of this role (Office of Government Commerce UK 2008) are:

- Adequate knowledge and information about the business and the work of the activity or its outcomes to be able to make informed decisions;
- Ability to network effectively, negotiate well and influence people, and build and maintain robust relationships with stakeholders within and outside the activity.

There is agreement that the support of the organisation's executive management is essential to success (Crawford and Brent 2008), yet stories of the 'accidental sponsor' abound (Englund and Bocero in press 2011). For success of any organisational work, the responsibilities of the sponsor role should include: management support activities such as budget allocation, approval of the project plan, project charter and project baselines, and any major changes; assistance in resourcing the project; issue and risk management. Leadership support activities will include political support at all levels of the organisation, and advice and assistance with major problems (Crawford and Brent 2008).

These roles and responsibilities may be perceived as onerous or time-consuming if the individual designated as sponsor does not understand the objectives of the activity, or the role, or is not interested in doing so. Since it is such a vital role to organisational success and is in many ways the key leadership role for the work it is essential that organisations develop a 'sponsor culture' based on the characteristics of leadership defined previously in this paper (Englund and Bocero 2007). The command and control management style will not easily adapt to these aspirational definitions of leadership or the sponsor role (Bourne and Walker 2005).

Change, uncertainty and anxiety

The nature of an organisation's work often triggers change, and with that change comes uncertainty and anxiety, affecting not only the team but also the organisation's leadership. Being 'not in control' is often viewed as management incompetence (Watkins 2003). The expectation is that management should be able to anticipate important potential changes and put in place controls to ensure that only the intended outcomes were realised. But managers (or anyone) only ever work with part of the picture and can never predict the full extent of issues that the work may encounter (Fonseca 2002). This is the 'zone' of unpredictability (Bourne in press 2011): introduction) that exists between the clearly defined strategies of the organisation and the tactical work to deliver that strategy. When *unknown unknowns* cause unplanned outcomes within the 'zone', the reaction of senior management is often to perceive that the activity out of control. The solution of choice is usually to introduce more or more rigorous and/or aggressive control mechanisms such as more detailed or frequent reporting, change team personnel, or impose an additional layer of management.

Uncertainty and ambiguity affect everyone in the organisation, at all levels: senior management is not exempt even though they are often the initiators of the change. Managers often respond to this uncertainty by applying any new solution that promises to be effective. Watson (1994: 896) hypothesises that management is "trying to exert control simultaneously on behalf of the employing organisation and over their own lives by using ideas and actions to make sense of their own lives and their place in the scheme of things." He has termed this *double-control*.

The situation is exacerbated by the inability of each group to see the point of view of the other. The nature of these asymmetric relationships (power) means that those at the top cannot understand the impact of the changes and controls they impose, and those at the bottom cannot understand the reasons for management requiring these changes. The nature of the power relationships and the relative positions of those operating within it are influenced by the organisation's culture.

Organisational Culture

Culture defines the environment in which work has to be done and outcomes delivered. (Schein 1985) defines *culture* in terms of systems of symbols, ideas, beliefs, values and of distinctive forms of behaviour. (Trompenaars and Hampden-Turner 1997) p13 define it as "a shared system of meanings (that) dictates what we pay attention to, how we act and what we value". Culture is *how we do things around* here and *cultural norms* are the unwritten rules of behaviour. *How we do things around here* varies with each group and/or organisation and depends on a range of factors such as the type of organisation, the industry it operates in, the country of origin, or country of location, management culture, demographics and generational mix (Bourne in press 2011) introduction). This means that there can be no universal law of organisational management or a universal management tool kit.

The way in which an organisation defines work structures is also defined by its culture. Construction/defence/engineering organisations share the following characteristics (Morris 1994) (Bourne and Walker 2004).

- Straightforward command and control structures,
- Well-defined management hierarchy,
- Authority and responsibility clearly defined often through functional groups.

This archetypal command and control culture is formed from military models (Talbot 2003). Its application was first directed to infrastructure projects such as the Western Railroad of the US with their hierarchical and bureaucratic line and staff management structure (chain of command) based on the military. The language and culture of management as we practice it today has direct links to this military connection (Talbot 2003). The military culture is echoed in the metaphor of business as war, whose reference manual is Sun Tzu, *the Art of War* and whose language includes such terminology as 'indefensible claims', 'targets', 'arguments shot down in flames' (Lakoff and Johnson 1981).

The structure, culture and language of the military has dominated in the world of organisations, and still drives the dominant paradigm of senior management being in command and therefore in control. In situations where goodwill, flexibility or self-motivation and responsibility are required, the command and control approaches of coercive power simply do not work, and have the effect of making success even more difficult for those whose task is to deliver the defined outcomes. Other structures have emerged – in particular the structure of the matrix organisation. The characteristics of the environment of the matrix organisation are completely different from those of the functional engineering structure based on the military model. They include:

- Multiple/competing lines of authority,
- Virtual and partial/part time teams,
- Changing scope and divergent objectives,
- Many levels and types of authority.

Matrix organisations require multiple relationships. In a matrix organisation, successful delivery will be complicated by multiple reporting relationships for team members and consequent issues around acquisition and allocation of resources from multiple sources as well as the complexities of communication to multiple managers.

Other forms of organisational structure are evolving. One form worthy of note is: *"patterns of relationships between people"* (Stacey 2001:140) where structure, power relations and forms of organising are not fixed, but vary in unpredictable ways according to events and relationships that occur in the 'zone' within and outside of the group. An example of this form is the circular form developed by (Hesselbein 1996) for the Scouting Association in the US. Because there is no hierarchal structure apparent in the depiction of this (circular) organisational form, authority and decision-making have to be re-defined: conversation and collaboration develops communication and interaction. Conversation forms the group, organisation or community (Fonseca 2002) and facilitates action, knowledge transfer and resolution of issues. The next section describes and analyses two case studies: *Plato and the Colonel*; and *Lariat and the CFO*.

Case Study #1 – PLATO and the Colonel

PLATO was a complaints and faults management system initiated in an Australian telecommunication company, Telephones Plus (T+) as just one project out of many identified during a Business Process Re-engineering (BPR) exercise in the 1980s. PLATO was a simple solution initially estimated to cost less than A$1 million and to take nine months to complete. The solution was in development phase when T+ was embroiled in a legal battle with a group of dissatisfied small business customers –VOTe (Victims of T+). T+ was reluctant (or unable) to act to satisfactorily address the concerns of the group. An enquiry commissioned by the government recommended significant changes to the fault and complaints management process. The report recommended that PLATO be modified to implement the changes. Development of the previous PLATO solution was more than half complete, and work was halted while the process was re-defined. The recommended process was complex: estimates for completion and implementation of this solution were much higher than the original costs of the much simpler solution. T+ had no option but to comply with this (now regulatory) requirement, and work re-commenced.

Business analysts, technical team members and the Call Centre staff, the ultimate users of the solution, raised their concerns about the complexity of the process. However, the leadership team insisted that the newly defined work must continue. 100% compliance with the recommendations was required as well as a new aggressive implementation timeframe – despite the concerns the project manager and user representatives presented to PLATO's steering committee.

The CEO appointed a Project Director – the Colonel. The Colonel had just retired from the armed forces and his friend, the CEO of T+, invited him to join the leadership team of the organisation. He was being assigned to different areas of the organisation so that he could learn the business before taking up a permanent role. The Colonel's task as Project Director of PLATO was to drive the team to meet commitments based on the estimates of the original works program. His management style was pure command and control, based on what he knew and had found useful in his career in the armed forces. He had never been involved with IT projects before, and had no understanding of the concept of *progressive elaboration* where early estimates were refined by increased knowledge and understanding of the work that had to be done. By this process he had appointed himself as the only stakeholder. His demands and expectations were paramount and had the support of the leadership team of the organisation, and no other stakeholders had any legitimacy.

The project manager had never encountered this type of aggressive behaviour before, having gained experience in IT projects from a technical perspective, through team leader roles followed by functional business and project management roles. She knew how to develop schedules and budgets and reports from that information but she had never been exposed the unpredictability of power politics and bullying management techniques such as those displayed by the Colonel. The advice given to her from others in the organisation was to just try to ‘weather the storm’: to recognise that he would move to another area once his three-month assignment was complete and that she could then work to repair the damage afterwards.

The project manager tried various means to moderate the demands of the Colonel. She tried to reason with him, presenting documentation to explain how the original estimates had increased in the light of the redefined scope. His response was:”*Just go do it*!!” The next step was to try to enlist the support of the sponsor. The sponsor understood the project manager’s dilemma but was not sympathetic – he explained how influence and politics worked in that organisation’s environment and gave her similar advice – “*Just deal with it – he will soon be gone*”. The project manager was acutely aware of her responsibility to the other stakeholders and to the organisation to deliver according to the regulatory requirements. She knew that waiting until the Colonel’s assignment was over would be disastrous for the profile of the organisation, the project and the project team and herself. Her attempts to meet with the CEO to enlist his support for the good of the organisation were unsuccessful. Her final tactic was to bypass the authority of the Colonel entirely and report on project progress to the General Manager (GM), her boss and also nominally the sponsor of the project. This tactic was effective until the GM realised that the Colonel was not getting any of the reporting data. Eventually, the project manager had to accept that the needs of all other stakeholders would be ignored even though they were in conflict with those of the Colonel, and that all she could do was to develop and implement a strategy to ensure that the situation was remedied when the Colonel moved to his next assignment.

The week before PLATO was to be released into production, all work was halted, and the release was postponed. The CEO of T+ finally heeded the representations of a supervisor from the Call Centre who had been opposed to this (extremely complex and almost unusable) solution. A new group was formed to simplify the design. The project team were perceived by senior management to have failed, so the project manager was replaced and the Colonel was moved to his next assignment. The new team reviewed PLATO in consultation with the Call Centre staff (the end users), and released much later under a more experienced and politically astute project manager. This more experienced PM was able to manage the expectations and perceptions of influential stakeholders (and in the absence of the Colonel’s bullying behaviour) while still working with the project team (also stakeholders) to deliver the project.

This case study illustrates:

- Differences in culture and therefore expectations,
- The pitfalls of inexperience,
- Single focus on one assertive, powerful stakeholder – neglecting the legitimate needs of other stakeholders,
- The effects of uncertainty – how everyone from the most senior to the most junior reacts to uncertainty.

Cultural differences

This case study highlights a common issue in organisations with command and control management culture. There was a clash of cultures and conflicting requirements for, and expectations of, the outcomes of the work. The Colonel’s leadership experience was based on the military culture, where command and control prevailed. His project management experience was also based on the certainties and tangibility of logistics-based objectives – moving people and material to a defined place within a defined time-frame, based on centuries of experience of warfare and military logistics. IT projects rarely have tangible outcomes and do not have years of history to ensure that estimates developed for delivery have precedent: every IT application has unique features and implementation challenges and therefore very fluid estimates. The Colonel's knowledge of power and politics were also strongly rooted in the command and control culture – he was the protégé of the CEO: he knew how to use that connection to his advantage, whereas the project manager had no connections with senior leadership and did not know how to cultivate them, and believed that she did not have time to do so.

The pitfalls of inexperience

The situation was not necessarily unique to the Colonel's leadership style or to the culture of the organisation but it is highly likely that the project manager had not read about it in any textbook or had encountered such a situation in her short and limited experience. Experience of working in the complex political structures of organisations develops an understanding of the importance of managing the power relationships within that organisation: over time the skills and awareness of managers builds from working within a 'craft' mid-set to an understanding of the importance of operating in these power structures (Pinto, 1998;Bourne and Walker 2003). Although the case study doesn't specifically state this: it is likely that the sponsor (the GM) was also inexperienced in the roles and responsibilities of a sponsor. The GM was experienced in survival in a corporate environment but did not understand that the primary role of the sponsor is to support the project manager from a funding, resourcing but also a political perspective.

Even managers with considerable experience can have difficulty adjusting to new roles in new organisations. The Colonel was experienced in his previous role and organisation, but it is likely that he also felt anxiety and uncertainly, and pressure to succeed in his new role. He encountered the barriers that (Watkins 2003) indentified from his work with newly promoted executives. These barriers included:

- Lack of knowledge of the organisation's culture,
- Limited access to the informal networks of the organisation,
- Being known as an 'outsider',
- Limited credibility because he had come from a different industry culture.

In such situations people revert to what has been successful in the past: the Colonel was doing what he had always done; and because of his background (culture) he was not open to advice from anyone with less organisational power than he perceived he had.

Unbalanced stakeholder engagement

Focus on one stakeholder can lead to neglect of other equally important but less vocal stakeholders, leading to their perception of failure of the work because it had not delivered to their expectations or requirements. Inexperience, a bullying stakeholder and also pressure to deliver make a toxic combination, and one that even seasoned managers have difficulty managing. Without a clear understanding of the stakeholder community of this project: who all the stakeholders were, who was most important at that time in the project, what the expectations of ALL these important stakeholders were, and their level of support, it would be impossible to know how to engage stakeholders for success. As it was the expectations of the important stakeholders were not known and not understood:

we know in hindsight that some of the other important stakeholders – the end users – had expectations that were in conflict with those of the Colonel. Ultimately it was the 'urgency' of the end users – the call centre staff and supervisor - that prevailed. They had a very high personal stake in the outcomes and were prepared to go to any lengths to ensure that their stake was recognised and their objectives achieved (Bourne 2010). Taking this urgency into account they actually were the most important stakeholder group, but the project manager had no means of knowing that.

The effects of uncertainty

The stress and anxiety experienced in coping with change is borne by everyone in an organisation, not just the managers, but also all members of the organisation's community. Management of T+ was determined to meet its regulatory requirements, and did not want to be distracted by the competing (though legitimate) claims of their customers or employees. As management and regulatory pressures forced the PLATO project to review and re-develop the solution, the project manager's lack of authority and influence became more and more evident as her advice was ignored and attempts to regain control of the deliverables of the project unsuccessful. The users of the solution, primarily Call Centre staff, were resistant to all changes delivered by the solution, even in its original form. The Colonel had been placed in an unfamiliar situation and an environment of conflict. He had the support of senior management and so acted in the only way he knew – seeking to control the work of the project and to expect the team and stakeholders to deliver. Without understanding the history of the project and its estimates and without also recognising that scope changes and new technology were highly risky and needed to be balanced by a level of flexibility, he was bound to lead the project to failure and stakeholder dissatisfaction.

Case Study #2 - Lariat and the CFO

Twenty years later the PM of PLATO returned to T+ as Project Director (PD) to lead a high profile, complex development whose major deliverable was an interface to a complex accounting system that managed the financial and accounting aspects of its business – this was Lariat. Lariat's objective was to enhance the collection of data in the major system through an interface from project management software already in use in the organisation. Since she left T+ in the 80s, the PD had earned a reputation in the industry for delivering difficult applications to the satisfaction of her important stakeholders. She had an additional advantage: she was known to many of the senior management team and some of the leadership team because she had worked with them in past assignments in T+ and in other organisations and industries.

The PD encountered major issues in the early phases of the work in Lariat. The business case proved difficult to justify: all tangible benefits that could be identified had been claimed for the mainframe software implementation. The CEO had just issued an edict that no new work was to be approved without a viable ROI. T+ had contracted another organisation to provide all team personnel for this and other work undertaken in this area. The nature of this outsourcing agreement meant that the PD had no control over personnel allocated to work on the project – her team. If there was no stability in her team, or if she could not select team members based on their skills, experience and 'fit' in the dynamics of the team, her chances of successful delivery of Lariat's outcome was significantly reduced. An additional risk to the project outcome was that costs had been quoted as time and materials (T+M) but capped at a budget based on an early estimate. This factor added to the uncertainty of costs and the credibility of the business case.

The functional managers were reluctant to sign off on the benefits of the business case and also to commit resources to the work. There had been many changes to the structure of the organisation over the previous year. The strategy to implement Lariat and the restriction on approvals for new work were the result of changes to the industry that impacted the profits (and share price) of the organisation. The resultant uncertainty and anxiety had afflicted the culture of the organisation, and fear of more change caused middle management to be unwilling to commit to anything new. In particular there was one difficult stakeholder, a Regional finance manager (RFM), whose job roles and authority, as well as his place in the organisation, were at risk due to the organisational and structural changes to be implemented at the same time as the interface. He was well liked, had been in the organisation all his working life. His resistance was in the form of a concerted program of negativity, finding flaws in the specifications, stakeholder requirements and implementation plan.

The CIO had mandated that the interface be developed using new technology: this 'middleware' was relatively new in the technical community and there were very few experts in its use and development and certainly none in Australia. This meant that extra costs and time would be incurred in adding this technical complexity to a solution that could have been equally effective as a straight-forward interface between the major application and the PM software. The simpler solution would incur lower costs over a shorter timeframe, and more importantly the appropriate skills were readily available. On the positive side the user community of this application was extremely positive and supportive of the work and its outcomes.

The PD embarked on a number of activities:

- Analysis of the stakeholder community,
- Obtain the support of the CFO (the sponsor),
- Negotiate for the ability to select team members.

Analysis of the stakeholder community

Using the 5-step ***Stakeholder*** *Circle* methodology described earlier in this paper, the PD and a small team identified the important stakeholders for that phase in the project, their level of support, and a communication strategy to engage them. The CEO, the CIO, the CFO, the leadership team and the financial community were recognised through this process as being important, because of their power and influence. More importantly the RFM was identified *as one of the most important stakeholders* because he was assessed as having a high personal stake in the failure of the project (or at least extreme modification of its objectives), was acting to achieve this stake ('urgency'). This high rating for urgency coupled with his ability to influence other influential people in the organisation meant that he could, if unchecked, lead to reduction in support of other stakeholders and possible reduction in funds and team resources as a result of the reduced support.

Obtain the support of the sponsor

The PD understood that she had to obtain the support of the CFO (the sponsor). This support was essential to:

- Persuade finance department staff to endorse the business case,
- Influence the CIO to remove the requirement to use middleware, and
- Counteract the negative influence of the RFM.

The business case was built on an expectation of an increase in the accuracy and timeliness of finance reports and improved access to key financial data to achieve cost reductions in the organisation. The PD was able to provide the CFO with a clear understanding of the risks to achievement of his goals of both the overly complex technological solution and the RFM's negative campaign. Not only did the CFO agree to persuade the CEO of the importance of this application and recommend approval of the business case, he also agreed to recommend that the first release should be a simple interface, with the more technologically complex version as a later release. Managing the difficult stakeholder took more time and effort, but eventually the CFO recognised the destruction that this stakeholder was causing to the project and also to staff morale. The Regional FM was offered an overseas post and happily moved away.

Selecting team members

The next step was more difficult and required much more negotiation and patience. This was to negotiate with the organisation's procurement group and the outsourcing supplier organisation to allow the PD to select team members. The technical component of the application, its potential to significantly improve the financial operations of the organisation and the specialist nature of the work made the project very high risk. The PD needed to ensure that a well qualified, highly experienced, and high functioning team was assembled. With the complete support of the CFO she was able to negotiate successfully for autonomy in team selection.

With those agreements in place the project became low risk and proceeded without incident to achieve its deliverables as planned. Release 2 of the interface which included the middleware options was more risky and more expensive but was able to leverage off the existing infrastructure and framework. By delaying the middleware option, Release 2 had the necessary lead-time to acquire experienced technical experts to assist in the development.

Analysis of this case study shows:

- It is essential to identify the important stakeholders for each phase of the work,
- The importance of knowing stakeholder's expectations,
- Understanding the power relationships within an organisation is important but it is just as important to be willing to work within them,
- Reputation, credibility and trust are essential ingredients in managing and engaging senior stakeholders.

Knowing who is important

Membership of the stakeholder community will change as the work moves through each of its phases: the composition of the sub-group of important stakeholders will also change. The stakeholder community should include stakeholders from each *direction of influence* (see figure 1). While there will always be a strong representation of *upwards* stakeholders, there should also be representation from *downwards* (the team), *sidewards* (the peers of the manager) and *outwards* (stakeholders outside the project). Usually there will be a mix of important stakeholders who are in support, but a group of stakeholders who are not in support. In this case study, the users of the application *(outwards)* were very supportive and interested in the outcome, while the *upwards* stakeholders were also supportive and interested but had to be persuaded to adapt their expectations to a multiple release strategy that would meet their expectations but over a longer time-frame.

Knowing expectations

Knowing who the important stakeholders are early in the life of the work, and knowing their expectations, ensures that conflicts can be recognised and addressed proactively. The PD needed to understand what a successful outcome meant for each of the important stakeholders. Knowing the expectations of each of these stakeholders also meant that she was able to craft appropriate communication to gain the support and influence of each stakeholder. In some cases there were conflicts of expectations. The PD had to be aware of what these conflicts were and leverage the influence of other stakeholders to achieve the best outcome. One example was the edict of the CEO for a positive ROI for every new project. The CFO was able to make a successful case for Lariat being incorporated into the original business case for the accounting software: using the substantial tangible benefits identified in the original business case and arguing that the interface was not a new project. This was a focus on '*helping the sponsor (the CFO) help the project'* through providing a credible argument and evidence to support the sponsor's approach to the CEO. The ability to negotiate with stakeholders and achieve agreement within a set of conflicting expectations will come from experience, but not only will the chances of successful outcomes be increased, but also the credibility of the manager will be enhanced through the successful negotiation process.

Working within the power structures

Since she had last worked in T+, the PD had acquired the experience, ability and willingness to operate in the power structures of the organisation to achieve the best outcome for the organisation (Bourne 2009). These qualities were attained over many years of working in difficult organisational environments, and learning from these experiences. Successful achievement of organisational outcomes can be affected by both the hidden agendas and the reactions of stakeholders. The stakeholder community extends well beyond the more readily recognised stakeholders (sometimes referred to as *primary* stakeholders). In large complex organisations, understanding the power structures and using them to influence project outcomes is often understood as 'politics'. Awareness of the need and ability to manage different types of stakeholders and their 'how, why and when' issues to address stakeholders' needs is an essential part of a successful manager's toolkit.

Reputation, credibility and trust

The PD had credibility within the organisation through a reputation in the industry, the influence networks she had developed and sustained over time. She was able to provide strong recommendations for issues of risk reduction and cost containment in business language best understood by the leadership team. Despite the ability of the PD to manage the relationships and expectations of the important stakeholders, there was still considerable time needed to analyse the stakeholder community, understand the expectations of the important stakeholders, develop targeted communication strategies and negotiate with the stakeholders who had conflicting expectations. Dealing with the needs and demands of the people (stakeholders) will take time, but it is an investment in the success of the work and insurance against issues that may occur when stakeholders are ignored, neglected or just not provided with the information they need to perceive that their expectations are being met (Bourne 2009).

Without organisational authority or status managers must rely on other attributes to achieve the organisation's outcomes. These attributes have been illustrated in the two case studies: the ability to:

- Build credibility through the reputation for successful management and leadership;
- Develop and maintain networks as a source of influence and access to power;

- Be willing to operate within the power structures of the organisation;
- Understand the expectations of stakeholders and to communicate in the language that matches their own roles and experience;
- Recognise that the groundwork must be laid *before* a crisis occurs through targeted communication of progress, including fearless but fully analysed reporting of issues or risks;
- Help the sponsor assist the manager and team deliver success to the organisation
- Recognise that not all individuals in positions of power and authority understand the requirements of leadership, and even if they do in conditions of anxiety or uncertainty may revert to instinctive command and control.

Analysis

The building blocks of the robust and trusting relationships identified as essential in the examples described in this paper are firstly the establishment of professional credibility through a track record of success and achievement. The second building block is the building of social connections and networks, within and around the environment of the activity and the organisation. Credibility and capability to operate at a senior level and understand that responsibilities and drivers are different at different organisational levels, is critical to building rapport with senior stakeholders. Case 1 demonstrates that the project manager’s absence of credibility: her limited access to and use of networks meant that she had no way out. The sponsor was not moved to support her and to go against the wishes of the CEO, or to attempt to be a buffer between the team and the Colonel. Case 2 demonstrates how a reputation for delivery strengthened the credibility of the PD so her advice was considered worth listening to. Knowledge of how to communicate in business terminology and willingness use her networks contributed to securing the CFO’s support for her delivery plan and strategy to reduce risks.

While it is essential for the manager to understand and apply the techniques described above it is also important to recognise that despite what organisations and the world at large expect of leadership, those individuals who have reached senior positions in organisations do not necessarily know these expectations. While ‘leadership’ is now recognised as needing the amalgamation of left and right brain thinking, creativity and strategic thinking, motivation skills and positive attitudes, the senior stakeholders described in the two case studies appeared to be more concerned with meeting the expectations of their own senior stakeholders and with surviving in the uncertainty that surrounds operating in a ‘corporate jungle’. So while the concepts of ‘leadership’ have moved from transactional through transformational and now to the desirability of authentic leadership (and sponsorship), there will inevitably be a lag in how *the people who are in leadership roles* cope with the requirements of leadership. The lag is the result of personality, culture – generational, professional, national and even possibly organisational, the training and experience of the ‘leader’ and also how he or she perceives the expectations of stakeholders.

Managing a senior manager’s optimistic (unrealistic) expectations needs a strong relationship between the team and its stakeholders. Consistency, perseverance and determination are important in building mutual respect. The development of stakeholders’ perceptions of the individual’s personal credibility, wider personal and professional relationships, contacts and networks are all essential elements that go towards building the respect needed to change senior stakeholders’ perceptions. These wider relationships must be built not just ‘for the project’ but maintained long-term. It is important however to recognise that the relationship between a manager and his or her senior stakeholders is not just a simple two-way relationship. The relationship is really defined by the organisational context, by the needs and expectations of each party, and by the additional complexities added by operating in the 'zone' of uncertainty.

Conclusion

The techniques for managing the expectations of senior stakeholder and managing the behaviours of difficult colleagues (also stakeholders) used by the managers described in this paper appeared to be instinctive. In reality the approaches were probably partly instinctive and partly developed from experiences from a variety of sources, both business and personal. Many less intuitive or experienced project managers would probably benefit from the application of stakeholder management methodologies and practices such as the ***Stakeholder*** *Circle®*. By applying techniques such as those defined by ***Stakeholder*** *Circle®,* any manager can benefit from the structured, staged approach to gathering data about stakeholders leading to targeted communication and building and maintaining robust relationships with key stakeholders. The story of the case studies has to be of its nature simplified for narrative purposes (Pellerin 2009). What is not recorded is the timeframe, the frustrations encountered through difficulties of influencing negative or unsupportive stakeholders to modify their perceptions of the work and its outcomes, and more importantly recognition of the iterations of engagement that are part of any program to advise upwards to get support, maintain support and learn from setbacks.

This paper defined a framework to assist individuals in an organisation to build relationships with senior stakeholders through building credibility so that when support is needed, it is readily given. Data from surveys seeking to understand how managers make the transition from middle management to the ranks of the senior leadership team, or how CEOs emerge from the senior leadership team to lead organisations, recognises that each transition requires a major change in behaviour and that the same guidelines apply each time. These guidelines recognise the need to learn from others, to understand and manage the expectations of their stakeholders, and to build and maintain relationships within and around the individual's sphere of influence.

These guidelines are the same for anyone in an organisation who needs to engage their own senior stakeholders. The two case studies described situations often encountered in organisations. The approach is the same: develop credibility, build and maintain relationships with important stakeholders, and recognise that the perspective of the stakeholders comes from their own background, experiences and the organisational culture itself and for now will most often be based in the command and control school of management.

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