STAKEHOLDER ENGAGEMENT BEST PRACTICES GUIDE

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14 STAKEHOLDER ENGAGEMENT BEST PRACTICES

Understanding (and implementing) best practices may help you gain confidence while interacting with stakeholders while also assuring you get the greatest results for your project, organization, and any stakeholders.

Here are 14 stakeholder engagement best practices that are based on the experiences of stakeholder professionals, the International Association for Public Participation's (IAP2) core values, and International Finance Corporation's (IFC) key components of good stakeholder engagement:

1. Use a stakeholder engagement tool

All organizations that are serious about stakeholder engagement best practices require a stakeholder engagement platform or system. You will get more out of your resources and increase your chances of success if you follow the best practices outlined below and implement them utilizing the best stakeholder engagement software available. Quorom, InfoFlo, Flowpath, Simply Stakeholders, and Visible are examples of excellent stakeholder engagement software tools.

2. Create a plan.

You should always create a stakeholder engagement plan first. A basic plan needs to include who your stakeholders are, why you need to engage them, how you'll engage them, and the objectives you want to achieve. You can ensure that your organization has the capacity to follow through on stakeholder engagement and make the most of your resources if you have a plan in place. Finally, a plan will lead you through every stage of the process, from identifying stakeholders through reporting.

3. Determine your definition of success.

Regardless of how well you implement stakeholder engagement best practices, if you don't keep track of engagement levels, procedures, and results, you have no idea if your efforts have been productive. As a result, be realistic about your expectations for involvement and the very minimum levels of engagement you'd want to see. Set realistic expectations. For example:

- At a future planning meeting, there will be 100 people of the community. Set some goals, for example, around demographics or geography, for the representation of those 100 persons.
- 250 survey answers, or possibly a proportion of the impacted population
- 10 phone or email interactions each week during the project
- Response times for follow-up tasks and complaints
- Issue resolution satisfaction rating.

Include targets, deadlines, and benchmarks in your strategy to define these measures. Also, keep your expectations in check; you won't be able to transform the world overnight.

4. Be inclusive.
Recognize that your stakeholders are diverse, and it is your job to give all stakeholder groups and individuals an equal opportunity to participate. You can accomplish this by:

- Obtaining accurate information about who your stakeholders are and how they prefer to interact
- Ensuring that information is available in a variety of formats (audio, in-person, online, offline, other translations, video, text)
- Taking steps to reach out to a culturally and linguistically varied audience.
- Planning engagement events and communication that encourage the participation of people with disabilities.
- Double-checking that the terminology you're using doesn't exclude anyone.

5. Make a list of your stakeholders.
You'll need to identify your stakeholders as part of your stakeholder plan. Make a list of all the people, groups, and organizations that are impacted by or might have an impact on your project or organization. You'll know who you need to engage once you have your stakeholder list, and you can start arranging the messages and techniques that are appropriate for your individual stakeholders.

6. Always be adaptable and flexible.
Stakeholder engagement isn't about controlling people and making them your pawns. It's about collaboration. Your stakeholders' contributions, perspectives and concerns should be taken into consideration and *should* influence the decisions made. Following stakeholder engagement best practice means you welcome constructive feedback and that you're open to making changes and adapting.

7. Identify your key stakeholders.
If you've done your job well, you'll have a lot more people on there than you can realistically engage with on a deep level.
Decide which of the persons and groups on your list are key stakeholders. These are the people with whom you will need to engage more and whose participation is critical to the success of your project. To segment your stakeholders, use the Stakeholder Mapping fields of Influence, Interest, and Impact to concentrate your time and resources, while still broadening your stakeholder engagement.

8. Customize your content and communication.
The same technique of delivering or presenting your message is unlikely to be appropriate for all of your stakeholder groups. Stakeholder engagement best practice dictates that you customise the information to different stakeholders so that it addresses the topics that they are most concerned about and is provided in the style that they prefer.

9. Communicate clearly

Here are some suggestions for improving your communication:

- Present the facts objectively
- Be as transparent as possible
- Explain what is unknown and what is certain
- Show how stakeholders can offer their perspective and contribute
- Disclose facts early on and explain how stakeholder involvement will affect decisions made. Maintain open lines of communication with all stakeholders throughout the project's lifespan.

10. Listen.

Communication should be two-way. Give your stakeholders opportunities to:

- Present the facts honestly
- Be as open as possible
- Explain what is unclear and what is certain
- Show how stakeholders may express their opinion and contribute
- Disclose facts early on and explain how stakeholder engagement will affect decisions made.
- Maintain open lines of communication with all stakeholders throughout the project's lifespan.

And, more importantly, pay attention to what they're saying and address their concerns. That is the key to participation and engagement, especially when dealing with contentious or sensitive projects and concerns. As a result, you'll be able to demonstrate openness in your reporting by demonstrating how you responded to stakeholder criticism.

11. Quickly respond and reply back.

Respond to any issues or concerns made by stakeholders, rather than just listening. Demonstrate that you're open to having a dialogue and participating in genuine debate about issues.

12. Encourage participation from beginning to end.

Stakeholder involvement is not just about exerting power over others and using them as pawns. It is all about working together. The contributions, opinions, and concerns of your stakeholders should be considered and influenced by the decisions made. Following best practices for stakeholder engagement implies you embrace constructive criticism and are willing to adjust and adapt.

13. Keep track of your interactions.

Stakeholder engagement software should be used to capture details on all discussions you have with stakeholders, whether by phone, email, or in person. This best practice for stakeholder engagement is incredibly useful - monitoring your communication and interactions can help you uncover issues, determine who is (and isn't) involved, and share knowledge as a team.

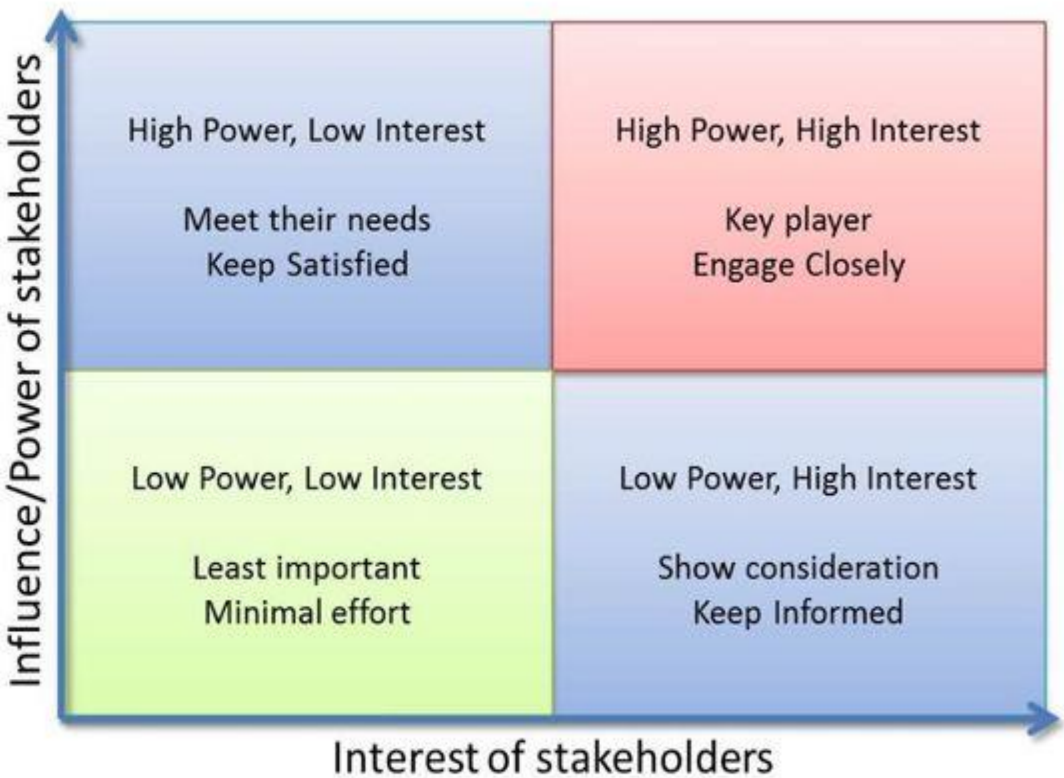
Stakeholder engagement software also allows you to track issues and dialogues across various channels (such as workshops, social media, media, and surveys) and see issues and trends across all of these channels.

14. Provide updates and reports.
Reporting is crucial. You owe it to your stakeholders to let them know how your organization or project did, what the outcomes were, and how they were affected. Stakeholder engagement software can assist you in producing ready-to-share reports and updates.

Adapted from Stakeholder engagement – best practice guide https://simplystakeholders.com/stakeholder-engagement-best-practices/

STAKEHOLDER MAPPING FIELDS OF INFLUENCE/POWER AND INTEREST

One way to manage stakeholder relationships is to arrange your stakeholders into matrices. Below is a matrix that includes the fields of Influence and Interest. The area that a stakeholder has been placed in helps guide your course of action for that individual or organization.



Source: Stakeholders Analysis: Power/Influence-Interest Matrix Stakeholders Management by Carlos Eduardo Martins Serra

TIPS FOR WRITING AN INTRODUCTION EMAIL

It can be difficult to write an introduction email. This is due to the fact that you must first evaluate the recipient. Is he/she interested in learning more about you? Is he/she even interested? So, if you want to make the process go more smoothly, take a look at the following guidelines for writing an introduction email in pdf.

1. Be clear in your subject line about the purpose of the e-mail. Since this is going to be the first the first thing your reader sees, it will help them in determining whether or not your email message is worth reading. “Introduction – [your name] or [your organization's name], for example.”

2. Begin with a friendly greeting and a brief self-introduction. Include a detailed explanation of how you obtained the email address of the receiver.

3. State your reason for writing in a clear and concise manner.

4. Include extra information only if it is pertinent. You might also have a look at some invitation email examples.

5. Express gratitude to the receiver for taking the time to read your email.

6. Don't forget to include a call to action (e.g. I look forward to hearing from you).

7. Use succinct and courteous concluding remarks like "Sincerely."

8. Include your contact information in your email signature if you already have one.

9. Maintain brevity. If you don't mind the length of your email, a few phrases could be enough to convey your message adequately.

Adapted from https://www.examples.com/business/introduction-email.html.

SAMPLE STAKEHOLDER INTRODUCTION E-MAILS

1. Cold introduction template

Goal: You want to connect with someone who doesn't know you or your business.
Why it works: It focuses on them and how you will solve their pain point.
Cold outreach emails are messages you send to someone you don't know, and with whom you have no other point of contact. They're usually done to kickstart a lead generation campaign, to expand a contact list, or to reach new audiences.
But it's tricky to get a response to a cold introduction email. It's critical that you get to the point quickly. Let the recipient know how you found their name and contact details, who you are, and how you'll help them, then back it up with evidence of how you've helped similar companies in the past.

Subject Line: [Contact's name], can I take two minutes of your time?
Hi [contact's first name],
I found your name [define specific source], and [personalized compliment].
We are [why you are a credible source] and we understand [identify a pain point]. Over the past year and a half, we've worked with [name two or three similar companies], and have helped them achieve [identify your number-one benefit]. I know that we can help [contact's company name] too.
If this is on your agenda, then I'd love to schedule a brief 5-minute phone call to discuss how we can help you. I'm available at [x, y and z times]. Do any of these work for you?

If you're not addressing this issue right now, or you don't feel we'd be a good fit for you, I completely understand. Thanks for your time.

Regards,

[Your name]

2. Follow-up introduction

Goal: You want to reconnect with someone you've already met in person.

Why it works: You've already met, giving you a basis from which to expand on your key offering.

If you've met someone in person at an event or have been personally introduced by a mutual contact, then it's a good idea to follow up with an email. You've already been formally introduced, so this email is a refresher. It will provide your new contact with your details and also give you the opportunity to both deepen your connection and emphasize how your organization can help.

Subject Line: [First name], it was great to meet you at [event]

Dear [first name],

I'm so glad we had a chance to meet at [event].

I understand from [mutual connection] that you [identify their pain point]. Over the past year our organization has [name two or three accomplishments]. Perhaps you would be interested in learning more about our organization.

If this is on your agenda at the moment then I'd love to schedule a brief 10-minute phone call to discuss how we can help you. I'm free [x, y and z times]. Do any of these work for you?

If this isn't something you'd be interested in at the moment, then I completely understand. Thank you for taking the time to read this, and again, I enjoyed meeting you.

Regards,

[Your name]

3. Referral introduction

Goal: You want to reach out to someone with whom you have a mutual connection.

Why it works: Bringing in your mutual connection gives you weight as a recommended and trustworthy source.

This is an email you'll send to someone a mutual connection has referred you to. This is probably the simplest path toward making a new connection that there is – people are more likely to be convinced by a recommendation (albeit implicit) than if they receive a cold email out of the blue.

Ideally, you'll ensure that your mutual contact makes the initial email connection, cc'ing you both. Then, you can pick up the email thread from there.

However, if you can't make that happen, try this template. Note that it is similar to the follow-up email, with a few differences.

Subject line: Hi [first name], [mutual contact] would like to connect us

Dear [first name],

I am reaching out because [mutual connection] (copied into this email) suggested that we connect.

I understand from [mutual connection] that you [identify their pain point]. You might be interested to know that our organization has [name two or three accomplishments]. Perhaps this subject is of interest to you.

If this is on your agenda at the moment, then I'd love to schedule a brief phone call to discuss how we can help you. I'm available [x, y and z times]. Do any of these work for you?

I appreciate the time you took to read this.

Regards,

[Your name]

4. A website-triggered event introduction email

Goal: To use a behavior on your website to trigger an automated email to introduce yourself.

Why it works: You know that the target is interested in you, based on their interaction with your website. This email introduction builds on that, and can be more direct.

An event-triggered introduction email is a message that's sent to a person who has visited a certain page on your site, or taken a certain action, like filling out a form or clicking on a "Contact me" button.

Although this email will be automated, it's important that you make it as personalized and personable as possible.

Subject Line: Congratulations! What's next?

Dear [prospect's first name],

Thank you for signing up to [newsletter/podcast, etc.]. Over the next few days you should expect [outline what correspondence comes next].

Attached is some additional information that you might find interesting.

If you'd like to chat more about our organization, I'd love to schedule a brief phone call. I'm free [x, y and z times]. Do any of these work for you?

I look forward to hearing from you.

Regards,

[Your name]

HOW TO MAKE A GREAT EMAIL INVITATION FOR AN EVENT

Once you've got your essential portions of the email ready, it's time to spice it up and make it the finest email possible, one that will entice your audience to attend the event. Increase your registrations and go full house by following the important points listed below:

Include an email signature.
As previously indicated, an email signature must be inserted at the conclusion of the email with the host's or the responsible person's contact information. This makes it simple for guests to find the person's contact information.

Make use of banners.
The legitimacy of the event will be enhanced by banner ads with a professional look of the email. You may create an email banner online and then incorporate it into your email signature.

Call-to-Action
When trying to persuade someone to sign up for an email, be sure to include a CTA (Call-to-Action) button, but only the one that is required.

The intended audience
It is usually preferable to address your target audience in a personal manner. It's also a good idea to segment your audience by location before sending emails and deliver them communications directly.

Content and Design
Another key aspect of the email is appropriate design and content. It establishes the email's foundation and aids in determining whether the email will be opened or sent to the spam bin.

Use of Social Media
What better way to get the word out about the event than through social media marketing? Millions of people will learn about the event the moment you post about it on Facebook, Instagram, or Twitter.

Using hashtags, tagging other people, and staying active on these channels are also important for managing social media profiles.

Adapted from https://secondnature.org/resource-invitation-letter/

WRITING AN INVITATION LETTER TO STAKEHOLDERS

The following items, in general, serve as a checklist of important information to include in the invitation letter:

- Time
- Location
- Date
- Title of event
- Type of event (i.e. invitation-only for a selected group)
- Purpose statement or intended objects
- Brief overview of event and related details
- RSVP details

On the next page is the sample invitation letter template that you can use to invite community members and other community stakeholders to your organization's event.

SAMPLE STAKEHOLDER INVITATION LETTER

Date

Stakeholder Name
Stakeholder Title
Organization
Address
City, State, Zip

Re: Invitation to [Insert Title of Cross-Sector Forum]

Dear [Insert name of invitee]:

We are writing to invite you and your organization to the [insert title of cross-sector forum] at the [insert location] from [insert time] on [insert date]. This forum has been organized by [insert organizer(s)] to [insert purpose].

[In this paragraph, provide a brief overview of the event, including details such as:

- Why the event is being held,
- Why is the invitee being asked to participate, and
- What are the intended outcomes of the event

We have attached an agenda for more information on the forum, and to register for the event, please RSVP at [insert URL for RSVP]. If you have any questions, please contact [insert name of contact person] at [insert contact information].

Thank you for your kind consideration of this invitation, and we hope to see you on [insert date of forum].

With best regards,
[Insert signature(s)]

[Insert name(s)]
[Insert title(s)]
[Insert affiliated school/department/center/organization]

10 NONPROFIT STORYTELLING TIPS

When you're ready to sit down and write your story, here are some helpful hints to keep in mind that will increase the impact and help you connect with your audience even more.

Be brief.

It's easy to get sidetracked and let your story turn into a novel, especially if you're passionate about the cause you're promoting. The structure we discussed above is the first step in maintaining focus on a compelling, readable story, but it's also a good idea to live by the mantra "less is more."

A tight story that keeps the audience's attention, especially in the internet age, will do more legwork for your fundraising appeals and marketing campaigns than a meandered story.

Use a Variety of Media

Make every effort to make your story multimedia-friendly. Create a long-form version that can be used to create a video or infographic. Reduce the length of your video for Instagram or Facebook. To promote your story on Twitter, use a quote from it. Cross-promotion of your content will assist you in reaching a larger audience.

Quality vs. Quantity is a debate that has been going on for a long time

Donors are more likely to be moved by stories about a single person rather than large groups. A relatable story about one person has power, but that power can be lost when extrapolated to large groups. So, instead of making broad generalizations, tell a personal story that demonstrates what your nonprofit does for the world.

Not every one of your donors will be interested in the same thing or want to hear your message in the same way. Try to tailor your stories to different segments of your audience. If you want to increase first-time donor donations, don't expect a story about a billionaire philanthropist to do the trick. Similarly, don't expect to reach baby boomers by posting your impact story on TikTok.

Statistics on the Features

Numbers are an excellent way to demonstrate the impact of your organization. Data allows you to demonstrate the difference you make in a concrete way, so don't be afraid to incorporate statistics into your story – either as part of the narrative or by using design elements and visuals.

Simply explain where the numbers came from, what they mean, and why they're good so that your audience understands the point you're trying to make.

Make Use of Your Supporters

Enlist your real-life supporters to be a part of your impact story if you have access to them. Use photos, or even better, video, to show viewers the real people behind the stories; images are more relatable and memorable than text, and stories from real people add emotional credibility to your content. In addition, ask questions that will generate quotes for social media, allowing you to cross-promote (see above).

Observe the Evolution of Stories

Once you've told a great story about an interesting person who has benefited from the work you do, check in with your audience on a regular basis to update them on the positive change that their support has resulted in. Seeing the difference donations make in a person's life over time increases the perceived value of those donations while also demonstrating your organization's commitment to the community.

Make a Request for Support

Do not, under any circumstances, attempt to do the task yourself. Organize a story-finding campaign among your employees. Encourage your employees to try their hand at impact story writing or production so that the style is not always the same. To be honest, no one is flawless when it comes to proofreading, especially when reviewing one's own work. You're not a professional photographer? Try to track down someone who is proficient in it. The better your tales are, the more your team and community are involved. And the greater your influence, the better your story will be.

Adapted from https://www.keela.co/blog/nonprofit-resources/improve-nonprofit-storytelling