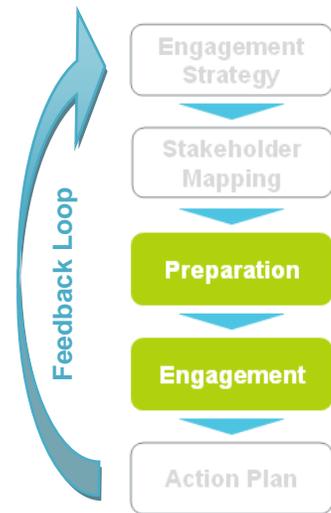


## BSR's Five-Step Approach to Stakeholder Engagement



## Introduction

The first two steps of BSR's five-step approach to stakeholder engagement have helped you to build a base of knowledge by developing your perspective, scope, and understanding of who you are engaging with and why you are engaging them. You are now ready to move on to **Steps 3 and 4**: Preparation and Engagement. Preparation will bring your knowledge to fruition. It will help ensure that your engagement is not an end in itself but a means to a process of continued dialogue with those most important to your business—your stakeholders.

**Action:** Before diving in, gather your internal stakeholder engagement team and reach out to the stakeholders you identified in **Step 2** to develop and communicate short-term and long-term goals for the engagement. These goals will help guide the rest of your preparation process.

## Getting Started

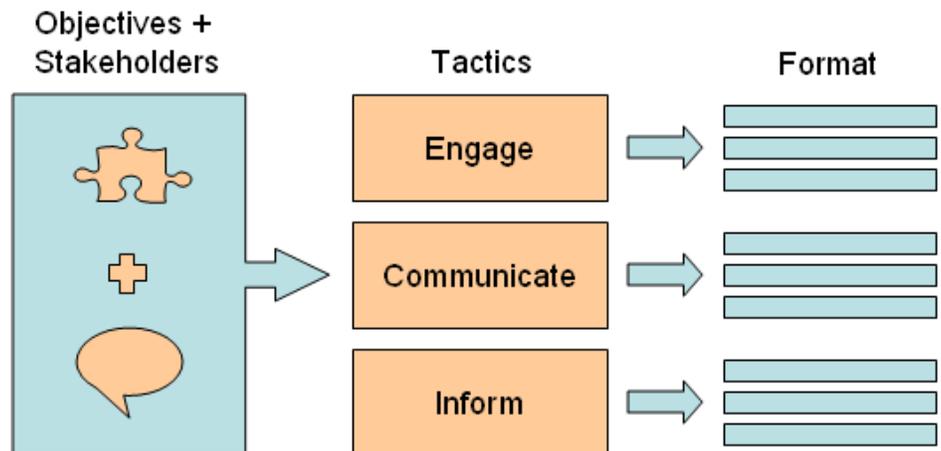
Your actions in prior steps have all been designed to inform and improve the preparation process. You have defined strategic objectives and prioritized your stakeholders. The intersection of these two key aspects will define your choice of engagement tactics, which will lead you to a format that matches your level of ambition.

**Action:** Depending on the scope of your engagement strategy, consider using multiple tactics to address different stakeholder groups simultaneously.

### Tip for Success

"Preparation is perhaps the most important step for successful stakeholder engagement. You should dedicate 80 percent of your time to preparation and only 20 percent to the engagement itself. This helps to avoid unpreparedness. Instead of focusing resources on cultivating excellent facilitation skills, you should focus on properly defining the rules of engagement and managing stakeholder expectations."

—Farid Baddache,  
Director, BSR EMEA



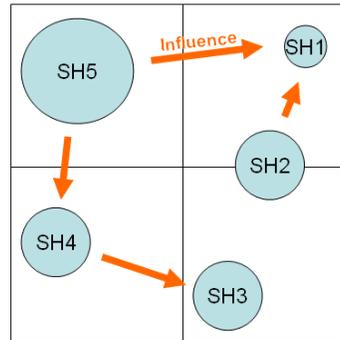
## Tactics and Format

Tactics are high-level descriptions of how you approach stakeholders. We have simplified the spectrum into three categories: engage, communicate, and inform:

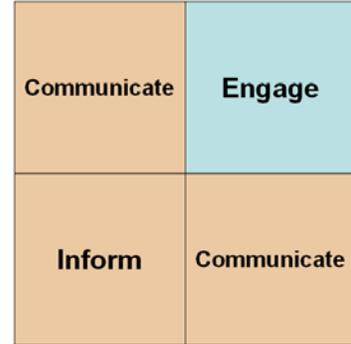
- *Engage* describes stakeholders with whom engagement is necessary.

- *Communicate* describes stakeholders with a high willingness to engage or a high level of expertise but who have not yet participated in dialogue with your company. Communicating more with these stakeholders will help them value engagement.
- *Inform* describes stakeholders who seek information only instead of a conversation.

### Mapping



### Tactics Quadrants



## CHOOSING YOUR FORMAT

Revisit your mapping to identify which quadrants stakeholders fall into. Rerank your stakeholder list using the engage, communicate, and inform tactics quadrant. Once you have determined which tactic is appropriate for your current engagement strategy, consider the formats from the following list, or develop a format that is appropriate for the tactic. Remember that you can simultaneously engage different stakeholders using a range of formats—you are not limited to one engagement format at a time.

Tactic	Format
<b>Engage</b> (high priority)	Joint venture
	Partnership
	Research collaboration
	Summit
<b>Communicate</b> (medium priority)	Sponsorship
	Survey
	Mass email or newsletter
	Social media
<b>Inform</b> (low priority)	Conference
	Marketing campaign
	Sustainability report
	Publication
	News coverage

## DEFINING THE EXCHANGE

If your chosen format is a verbal exchange with stakeholders, consider the pros and cons of different types of conversations and decide which approach best matches your objectives, including blog posts with moderation, teleconferences, webinars, one-on-one meetings, or group meetings, forums or events.

## Knowing the Other

The subtlest (and perhaps most important) part of preparing for engagement is understanding that you are a *subjective* party in the process. No matter how open and objective your company intends the engagement to be, each stakeholder will always have certain perceptions of you and the other stakeholders involved.

**Action:** Consider how certain elements influence your intended engagement and may change the conversation. Think about your selected stakeholder groups to anticipate their perceptions of the following criteria, and make adjustments to your plans where necessary. Most of these considerations apply to in-person meetings, but the general idea can be applied to communications efforts as well.

- **Authority:** In-house versus third-party hosting; placement and number of company representatives versus stakeholders; stakeholders' familiarity with subject
- **Formality:** Dress code; look of the presenter; marketing and display materials; the tone used to address the topic (passive, direct, apologetic, etc.)
- **Atmosphere:** Effect of the venue's atmosphere, e.g., warm, cold, welcoming, stuffy, or dark; "branding" of the event with company logos
- **Facilitation:** Type of facilitation necessary for your intended audience, e.g., engaged, hands-off, leading, listening, interactive, or professorial
- **Participation:** Dynamic of the stakeholders in the room; approach to fielding remarks and managing disputes; logistics affecting participants (distance traveled, etc.)

## The Raw Logistics

Logistics are an unavoidable part of designing your engagement. Review the following list of illustrative points to cover:

### Logistics that will help prepare for engagement:

- Determine if facilitation is needed and select a facilitator.
- Secure an appropriate facility (if necessary).

### Logistics that will help during engagement:

- Assign participants roles and responsibilities.
- Develop an agenda focused on objectives and outcomes.
- Develop rules of engagement, confidentiality and a decision-making process.
- Create engagement materials.
- Distribute invitations with practical information to participants.
- Communicate clear objectives, scope, and roles for participants.
- Set up channels of ongoing communication (Twitter feed, voting platform, white boards)
- Plan for catering, paying attention to special needs or diets.

### Logistics that will help post-engagement:

- Create evaluation criteria and measures for success.
- Develop a feedback plan and mechanism.

## The Engagement

After working through the necessary planning steps, you are on track for a successful engagement with your stakeholders. This is the moment when facilitation truly counts. Coach your facilitator to deliver on the following five points during engagement. If you are planning to facilitate the event, be sure to focus on the following points yourself. Once again, many of these criteria apply primarily to in-person meetings, but the general ideas can be applied to communications efforts as well:

- **Share stakeholder expectations:** Share feedback from your earlier goal-setting consultation process, or open the floor to stakeholders to share their expectations for the engagement.
- **Allow for equal contribution:** Encourage less verbal stakeholders to participate in the conversation; create a space where this is possible and comfortable; respect each party's right to pass.
- **Focus the discussion:** Dialogues can veer off-topic if not properly focused. Stick to your agenda and remain within the scope of the issue. Table any out-of-scope issues for future engagements, and be sure to address these in the future if you commit to doing so.
- **Manage cultural dynamics:** Your earlier activities should have prepared you for any tricky dynamics. But be wary of possible cultural misunderstandings during engagement, and manage them as they arise.
- **Mitigate tension:** Certain topics can be controversial or provocative, and there may be unexpected dynamics or rivalries between participants. Have security on-site to address elevated situations, but pre-empt difficulties by maintaining a calm atmosphere in the room.

## DOCUMENT THE ENGAGEMENT

In order to measure success and build on your efforts for future activities, make sure to capture the following in writing during the engagement: the original purpose and aims of the engagement, the methods used, the participants, a summary of noted stakeholder concerns, expectations and perceptions, a summary of discussions, and a robust list of outputs (decisions, actions, proposals, and recommendations).

## Next Step: Time for Action

Your tactical engagement may have come to a conclusion, but your work is not over yet. In [Step 5: Action Plan](#), you will draw upon the outcomes of your engagement to respond to stakeholder needs and further develop lasting relationships. If this particular engagement is part of a larger engagement strategy, you will also use what you learn to improve the process for future activities.

## Contact

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