



# TRACKER TRANSFORMATION

MANAGING CHANGE IN TRACKERS AND NORMED STUDIES  
**CHAPTER 4** | MANAGING STAKEHOLDERS



# CHAPTER 4: MANAGING STAKEHOLDERS



In many respects, the mechanics of a tracker change are easy. They represent a series of straightforward steps which, if executed thoughtfully, will lead to success. The real difficulty lies in managing the non-research aspects of the change, namely the political and corporate implications. In our experience, these concerns will at some point dominate the discussion. This chapter is devoted to managing optics and crossing the corporate minefield.

## Are the data going to change?

We posed this question in the last chapter, where we decided that (at least from a research point of view) this question wasn't as interesting as understanding how and why. For everyone else in the company, however, the research answer to this question will be dissatisfying—not because this answer is invalid, but because it misses the point.

This question is the “elephant in the room” for every discussion about tracker changes. The reason isn't surprising: over the past generation,

companies have come to rely less and less on intuition and conventional wisdom to set strategy and manage operations. In their stead, data have become the currency of knowledge, and the foundation for truth with a capital T, in a company. The heart of the issue, therefore, is that changing a tracker means changing the truth. This is an inherently destabilizing, and even threatening, activity.

How you manage the optics around this change in your organization will go a long way to convincing people the change is a success.

**Changing a tracker means changing the truth.  
This is an inherently destabilizing,  
and even threatening, activity.**

## The importance of communication

It is impossible to understate the importance of **regular, transparent, two-way communication** for managing internal stakeholders through a tracker change. Success is simply not possible without it. Beyond being essential for basic project management, this communication will fundamentally and profoundly influence people's perceptions of whether things are on the right track. Even a whiff of secrecy, or of apparent neglect of an "important" issue (whether it's truly important or not) will undermine your campaign. Perception really matters.

## Discovery

There are three things you will need to know to begin navigating these difficult waters.

**First, you need to understand who is using what data.** This will help you identify all stakeholders. The easiest way to do this is to look at the reports people use to illustrate success. The report is the public manifestation of the axiom "What gets measured gets managed." What company KPIs come from the tracker? What operational decisions are being made? Complete your investigation with interviews to round out your knowledge about who is doing what (and how often) with the data.

**Second, use the information you've collected above to begin to understand people's sensitivities.** It's fair to assume that public reports will be the places people will feel most exposed and thus most vulnerable. Ask leading questions like "What happens if this number changes a lot? Who comes knocking on your door?" to see how the unexpected cascades through the organizational chart.

**Third, ask people what they're missing, or what's not working well, and how the data could be improved.** If you only talk about change, nobody will see an upside, but this is more than just a rhetorical tactic. If you're going to go through the trouble of changing a tracker, you might as well take the opportunity to create change people will value. Even delivering just some of the change people want goes a long way in creating the feeling of success. It can also provide a longer-term agenda for gaining insight into the business.

When done comprehensively, the above discussions will help you identify stakeholders and their vulnerabilities, what they'll miss and what they want. Beyond being essential for the conduct of your project, this information becomes the basis of your negotiating and communication strategy.

## Who participates?

The easy aspect of participation is inviting stakeholders. You should be able to identify these people in your investigation. Be careful about numbers, though: large groups are inherently difficult to corral and manage. If you have to, create a core steering committee that really drives the project and makes decisions, and a larger team for less frequent updates. The core steering committee should be minimally composed of the project manager, the executive sponsor, and at least one member of the important teams or departments most affected (either as users or consumers of the data) by the change.

**Large groups are inherently difficult to corral and manage. If you have to, create (1) a core steering committee that really drives the project and makes decisions, and (2) a larger team for less frequent updates.**

The hard aspect of participation is the interplay of personalities. In the ideal world, all participants would be rational, calm people who could dispassionately contribute to constructive discussions about change and make expedient logical decisions whose consequences they're prepared to live with. (Who says researchers don't have a sense of humor!)

All sorts of people can impact your project. There is the kind-but-fearful Chicken Little who paralyzes the group with discussion of every detail; the smart-yet-toxic blusterer whose modus operandi is to intimidate; the seemingly agreeable-yet-scheming middle manager, who is quietly stabbing you in the back and sabotaging your project by issuing reports, with just the right level of dubious hearsay to create suspicion; the "indispensable" person who, from benign overwork or

passive-aggressive inattention, becomes an obstacle to progress, or the genuinely decent person who is a good partner but whose bonus hangs in the balance—to name but a few.

## Establish formal rules of the game: set expectations about participation, roles, and deadlines for project participants.

The way to deal with these people is twofold. **Formally, you need to establish rules of the game.** Set expectations about how and when people are supposed to participate. Be clear about their roles and deadlines. Faithfully document their adherence to these rules and address bad behavior quickly and effectively, either with the group or with their managers.

**Just as importantly, but less formally, and as painful as it might be, genuinely try to get to know them and pay at least some attention to their needs.** This may seem like a long way to go, but without genuine empathy you take on significant risks. As many trackers are linked to compensation and power, any changes will quite naturally create high levels of anxiety amongst those whose necks are in the noose. These concerns have to be addressed seriously since they affect people's reputations and livelihoods.

Change can create feelings of loss, apprehension, and even fear. Change replaces confidence with doubt, and faith with uncertainty. Not acknowledging these feelings is the surest recipe for failure. As hard as it can be to overcome emotional obstacles, it is both possible and necessary for success.

## The project manager

The above paragraphs hint at it, but let's be perfectly clear — the single most important driver of success will be a capable project manager who possesses the following non-negotiable qualities:

**Maturity.** Make no mistake: you can plan for things to go smoothly, but at some point there will be a problem. Your project manager must be a grown-up and be widely perceived as patient, trustworthy, and an honest broker. Hotheads and the arrogant need not apply.

**Discipline.** With all the moving pieces and personalities, your project manager must be personally reliable and disciplined. Someone who regularly drops balls or comes unprepared will quickly lose the confidence of the other participants.

**The project manager must be knowledgeable, mature, disciplined and a great communicator who is sufficiently senior and well-supported in the organization. These traits are non-negotiable!**

**Communication.** Both style and substance matter here. The project manager must be open, unafraid, and ego-free. It is as important to listen to what people are saying and understand what they mean as it is to inform them of what's going on.

**Status.** The project manager needs to have juice arising from (a) her/his position on the org chart, and (b) the visible support and public sponsorship of her/his manager to command the troops. This can be a stretch assignment for a promising employee looking to advance, but the scaffolding needs to be in place to support her/him.

**Knowledge.** Knowledge is table stakes. Fluency is important. The project manager doesn't need to know every single detail by heart, but s/he should be able to quickly summon information as needed and understand how the pieces fit together.

We reiterate here that the above factors are non-negotiable. If these traits don't describe you, find someone better qualified to help.



## Conclusion

Managing the people and politics of change in any context is hard work. Doing this in a research context is no different. For all the toxicity that can bubble up in any organization, it is not a job for the faint of heart or the glory hunter. Success is possible only from the hard work and leadership of a trustworthy project manager who, through good planning and communication, creates a framework allowing people to imagine a different future in whose creation they feel meaningfully included.



For more information, please get in touch with us  
[support@aytm.com](mailto:support@aytm.com) | +1 415-364-8601 | [aytm.com](http://aytm.com) © 2016

