

Cheat Sheet

OCM Stakeholder types

This cheat sheet serves as a quick reference guide for identifying and engaging stakeholders during organizational change initiatives. Adapt the strategies based on your specific organizational context and change requirements.

Executive Leadership & Sponsors

Change Sponsors

- Ultimate decision-makers who authorize and fund the change
- Provide strategic direction and remove organizational barriers
- Communicate the vision and rationale for change to the organization
- *Engagement Strategy:* Regular executive briefings, ROI demonstrations, strategic alignment discussions

Senior Leadership Team

- Department heads, VPs, and C-suite executives
- Responsible for cascading change messages to their teams
- Control resources and can influence organizational culture
- *Engagement Strategy:* Leadership alignment sessions, change champion training, accountability measures

Middle Management

Middle Managers

- Department managers, supervisors, and team leaders

- Critical link between senior leadership and frontline employees
- Often experience the most pressure during change initiatives
- *Engagement Strategy:* Manager toolkits, coaching support, clear role definitions during transition

Project Managers

- Coordinate change activities and track progress
- Interface between change team and operational teams
- Manage timelines, resources, and deliverables
- *Engagement Strategy:* Regular project updates, resource allocation discussions, risk mitigation planning

Frontline Stakeholders

End Users

- Employees who will directly use new systems, processes, or workflows
- Day-to-day operations will be most impacted by the change
- Source of valuable feedback on practical implementation challenges
- *Engagement Strategy:* Training programs, feedback sessions, pilot testing, user acceptance testing

Customers

- External clients who may be affected by operational changes
- Service delivery and experience may be impacted during transition
- Revenue and reputation depend on their continued satisfaction
- *Engagement Strategy:* Communication plans, service level agreements, feedback mechanisms

Change Management Team

Change Management Lead

- Develops and executes the change management strategy
- Coordinates all change activities and stakeholder engagement
- Monitors adoption and addresses resistance
- *Engagement Strategy:* Direct reporting relationships, regular strategy reviews, resource allocation

Change Agents/Champions

- Influential employees who advocate for the change within their teams
- Provide peer-to-peer support and address concerns at ground level
- Act as early adopters and success story examples
- *Engagement Strategy:* Champion networks, recognition programs, peer mentoring

Training Team

- Develops and delivers learning programs for new skills and processes
- Assesses training needs and measures learning effectiveness
- Supports knowledge transfer and capability building
- *Engagement Strategy:* Training needs analysis, learning pathway design, competency assessments

Support Functions

Human Resources

- Manages people-related aspects of change (hiring, performance, compensation)
- Addresses organizational design and culture transformation
- Handles employee relations and change-related conflicts
- *Engagement Strategy:* Policy alignment, talent management planning, employee support programs

IT Department

- Implements technical aspects of change initiatives
- Ensures system integration and data migration
- Provides technical support during transition
- *Engagement Strategy:* Technical requirements gathering, system testing, helpdesk support

Communications Team

- Develops and executes internal and external communication strategies
- Manages messaging consistency and timing
- Addresses rumors and misinformation
- *Engagement Strategy:* Communication planning, message testing, feedback monitoring

External Stakeholders

Vendors/Suppliers

- External partners who may need to adapt to new processes or systems
- Integration points may change during organizational transformation
- Contractual relationships may require modification
- *Engagement Strategy:* Vendor communication plans, contract negotiations, partnership agreements

Regulatory Bodies

- Government agencies or industry bodies that oversee compliance
- May need to approve changes or new processes
- Ensure adherence to industry standards and regulations
- *Engagement Strategy:* Compliance mapping, regulatory submissions, audit preparation

Board of Directors

- Provide governance oversight and strategic approval
 - Concerned with risk management and shareholder value
 - May need to approve significant organizational changes
 - *Engagement Strategy:* Board presentations, risk assessments, governance updates
-

Stakeholder Influence & Interest Matrix

High Influence, High Interest (Manage Closely)

- Change sponsors, senior leadership, key customers
- Require frequent communication and active involvement in decision-making

High Influence, Low Interest (Keep Satisfied)

- Board members, regulatory bodies, major vendors
- Need sufficient information to maintain support without over-engagement

Low Influence, High Interest (Keep Informed)

- End users, frontline employees, change champions

- Require regular updates and opportunities for input and feedback

Low Influence, Low Interest (Monitor)

- Indirect stakeholders, peripheral departments
 - Minimal communication required, monitor for changes in status
-

Key Engagement Principles

1. **Identify Early:** Map all stakeholders at the beginning of the change initiative
 2. **Assess Regularly:** Stakeholder positions and influence can shift during change
 3. **Customize Approach:** Tailor engagement strategies to each stakeholder group's needs
 4. **Communicate Consistently:** Maintain regular, transparent communication across all levels
 5. **Build Coalitions:** Create networks of support among influential stakeholders
 6. **Address Resistance:** Proactively identify and address sources of resistance
 7. **Measure Engagement:** Track stakeholder sentiment and adjust strategies accordingly
-

View our website for more helpful guides:

<https://www.ocmsolution.com/>
