STAKEHOLDER OBSERVATION
MINDING THE GAP BETWEEN WHAT THEY SAY AND WHAT THEY DO

Wendy Wickham, MA, MS, PMP
2020 Project Management Symposium
Personal Behaviors are the foundation of project risk

Access to resources

Execution of tasks

Change adoption
The gap is frequently a result of the current environment not supporting the desired change.
4 Steps

1) Know Yourself

2) Define Your Question

3) Observe Your Environment

4) Leverage Your Findings
1) Know Yourself

• Assumptions
• Biases
• Motives
1) Know Yourself - Assumptions

What do you expect to find?
1) Know Yourself - Biases

What are your personal biases?

What would you PREFER to see?
1) Know Yourself

WHY are you making this observation?
Pope Urban II preaching the First Crusade in the presence of Philip I before the assembly. An illustration from the Grand Chronicle of France, illuminated by Jean Fouquet, Tours, c. 1455-1460
1) Know Yourself

Observer  Participant
1) Know Yourself

Why you are making this observation, your circumstances, and your natural inclinations will help determine where you are on the observer – participant spectrum.
2) Define Your Question

- Choose 1 question per observation encounter
  - Example: Cultural norms
2) Define Your Question – Cultural Norms

What behaviors are you seeing frequently?
- Preferred modes of communication – Instant messenger? Phone? Email? Slack? Other?
- Response time?
- Active hours – AM? PM? 24/7
- Reaction to vacations/leave/sick time

Just observe the behavior.
You don’t need to figure out “why” during the observation.
3) Observe Your Environment

- Take notes on what you SEE, not just on what you hear
- Decide on a coding mechanism – you want this to be private
  – Qualitative Ethnographic Analysis
- Be open to multiple observation sessions on the same question
- Stay focused on your question, but be open to all activity
Consider leveraging your stakeholder matrix for coding and analysis

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Partner</td>
<td>Family</td>
<td>Daily</td>
<td>High</td>
<td>Neg</td>
<td>Pos</td>
<td>Pos</td>
<td>Change challenges lifestyle</td>
<td>Brainstorm ways to participate together</td>
<td>Shockingly excited. Wants to join me.</td>
<td>Suggests meal in diet</td>
<td>Thank him, cook the meal</td>
</tr>
<tr>
<td>3</td>
<td>Kid 1</td>
<td>Family</td>
<td>Daily</td>
<td>Low</td>
<td>Neu</td>
<td>Neg</td>
<td>Pos</td>
<td>Too young</td>
<td>Brainstorm ways to participate together</td>
<td>Wants no part of this change. Need to figure out how to address his concerns.</td>
<td>Eats meal without complaining</td>
<td>Find a way to have him help without me getting frustrated.</td>
</tr>
<tr>
<td>4</td>
<td>Kid 2</td>
<td>Family</td>
<td>Daily</td>
<td>Low</td>
<td>Neu</td>
<td>Pos</td>
<td>Pos</td>
<td>Too young</td>
<td>Brainstorm ways to participate together</td>
<td>Needs to set new agreement re: visitation and contact schedule. She wants no part of this.</td>
<td>Offers encouragement</td>
<td>Thank her. No further explanation needed.</td>
</tr>
<tr>
<td>5</td>
<td>Mother</td>
<td>Family</td>
<td>Monthly</td>
<td>Medium</td>
<td>Neg</td>
<td>Neg</td>
<td>Neu</td>
<td>Critical</td>
<td>Reduce interaction</td>
<td>Helps</td>
<td>Offers encouragement</td>
<td>Thank him. No further explanation needed.</td>
</tr>
<tr>
<td>6</td>
<td>Father</td>
<td>Family</td>
<td>Irregular</td>
<td>Low</td>
<td>Pos</td>
<td>Neu</td>
<td>Pos</td>
<td>Hard to separate from</td>
<td>Outreach. Maybe separate step. Reduce interaction</td>
<td>Helps</td>
<td>Offers encouragement</td>
<td>Thank him. No further explanation needed.</td>
</tr>
</tbody>
</table>
4) Leverage Your Findings

Bridging the Gap

1) Find Patterns
2) Bridge the Gap
   • Seeds
   • Trends
   • Rewards
4) Leverage Your Findings – Bridging the Gap (Patterns)

What is the default?

- Organization-wide (the most common pattern across the area of the organization that contains your stakeholders)
- Team (the most common pattern across a team)
- Individual (the most common patterns in a key individual)
4) Leverage Your Findings – Bridging the Gap (Patterns)

Are there norms among a team that differ from the broader pattern?
4) Leverage Your Findings – Bridging the Gap (Patterns)

What do you need them to do?

Make sure you define the pattern you NEED to see for your change to stick.
How radical is the change you are making?

Are there behaviors or skills or resources already in the environment that you can amplify?
4) Leverage Your Findings – Bridging the Gaps (Trends)

Will the environment support the change you are making?

Is there something happening in the broader world that might affect that support?
4) Leverage Your Findings – Bridging the Gap (Rewards)

What behaviors are currently rewarded and punished in the environment?

Do the rewards / punishments need to change?

- Is visibility rewarded over outcomes? E.g. “Butts in seats?”
- Is availability rewarded over effectiveness? E.g. “Online all the time?”
4 Steps

1) Know Yourself

2) Define Your Question

3) Observe Your Environment

4) Leverage Your Findings
Questions?

Wendy Wickham
wwickham@middlecurve.com
https://middlecurve.com
Resources

Resource Recommendations via ResearchGate
https://www.researchgate.net/post/how_do_you_analyse_your_field_notes_in_ethnographic_observations

An Introduction to Codes and Coding
https://www.sagepub.com/sites/default/files/upm-binaries/24614_01_Saldana_Ch_01.pdf

Watching Closely, A Guide to Ethnographic Observation
https://smile.amazon.com/Watching-Closely-Guide-Ethnographic-Observation-ebook/dp/B014V9FQFE/ref=sr_1_1?dchild=1&keywords=watching+closely&qid=1586098951&s=books

Wendy’s Previous Writing on this Topic – A
https://middlecurve.com/observing-behavior/
Example ethnographic notebook – Carolyn Chu Wong

On the relationship between software dependencies and coordination: field studies and tool support, Cleidson De Souza

https://www.researchgate.net/figure/Example-of-Coding-All-the-interviews-and-field-notes-were-coded-in-a-similar-fashion_fig1_34466382