

Rocky Mountain Institute: Tips for Successful Stakeholder Engagement

START WITH GOALS AND GROUND RULES. Working in a collaborative group setting is very different from other modes of interaction, so it always helps to respectfully remind participants why they're there and how to engage productively. Get agreement at the very beginning about the goal of the gathering, share the agenda, clarify roles such as your own as the facilitator, explain how decisions will be made (if relevant), and request that they follow certain ground rules such as reserving judgment and speaking openly.

BUILD AGREEMENT ALONG THE WAY. Getting the group to stand behind the process is the foundation for strong participation. You can gather ideas by proposing, listing, brainstorming, or clarifying what's been said. You can then combine any duplicates, prioritize the list, and ask for advocates. Then, to get agreement, you can ask for a show of hands, or give each person a certain number of votes to cast among the options.

GUIDE EACH DISCUSSION THROUGH AN ARC. Every discussion has a natural arc from opening, to narrowing, and finally to closing. Use your wording and questions to help the group stay aware of where they are, so that each segment of time can be used effectively.

LISTEN AS AN ALLY. One of the hardest things to do as a facilitator is to set aside your own opinions for the sake of helping the group as a whole. When you feel the need to advocate, set aside that need and focus on your curiosity about the speaker's point of view. You might paraphrase the speaker's words to confirm the meaning of what you heard, ask open-ended questions to probe for more information, or use your body language to show that you are at ease rather than in a confrontation.

USE CONFLICT AS AN OPPORTUNITY TO EXPOSE UNDERLYING BELIEFS. When people express conflicting views, compromise is rarely found without establishing mutual understanding. One of the best ways to get there is to ask the people in conflict to discuss their interests that underlie their position. What needs, desires, data, people, observations, or reasoning led them to their perspective? Mutually acceptable solutions can often be found where the respective interests of the various participants intersect.

STEP IN WHEN THE GROUP NEEDS HELP. Your goal as a facilitator is usually to melt into the background, keeping the focus on the group. But be alert to when the group needs help, and step in as necessary. Make process suggestions about how to proceed, educate the group about what steps you'll be asking

them to take, ask open-ended questions to encourage participation, and enforce agreements about what process should be followed.

GATHER ANY INFORMATION YOU CAN ABOUT HOW PARTICIPANTS ARE LIKELY TO ENGAGE. What are their learning styles, personalities, and cultural backgrounds? Try to find out what attitudes they are likely to share with others, where they are likely to diverge, and any points of existing tension. If you're concerned about encountering a challenging situation, role play different ways that the conversation could unfold and plan how to respond.

EXPECT A WIDE RANGE OF ATTITUDES. Participants will each have their own default habits in a group discussion. For some, that will be creative contribution; for others, it might be playing devil's advocate, being the pragmatist, or asserting control. Also, they may arrive feeling anywhere from fresh and energetic to bone-tired and disengaged. Watch for these patterns in their behavior, adjust your approach if necessary, and work with them to drive the conversation in a productive direction.