



Advanced

Remote Stakeholder Management

8 ways to adapt to challenges

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Remote Stakeholder Engagement

8 ways to adapt to the challenges

The COVID-19 pandemic has impacted every industry, from governments, health, education and transport, to service providers, retailers, mining and resources.

For many stakeholder engagement professionals, the impacts have been significant. Many have adapted their in-house roles to remote in order to limit face-to-face contact and the risk of transmission. At the same time, they've been working hard to keep stakeholders engaged and informed throughout the evolving situation. On top of this, many of the usual stakeholder engagement methods are now off the table - face-to-face meetings, events and conversations have given way to digital alternatives like video conferencing and online chat.

You're not alone if you've experienced a bumpy start to remote stakeholder engagement and have struggled to adapt. But for every challenge right now, there are also huge opportunities to adapt and even do better than before.

You can survive remote stakeholder management - and even thrive! We've put together a list of 8 ways to help your stakeholder team get through the challenges and come out strong.

1 Create a strategy

The first step is to take a step back and create a strategy for remote stakeholder engagement. Before COVID-19, most companies would take many months or even years to transition to remote work, but many needed to make the change overnight. So, if you were reactive in the early days, now's the time to make a long-term plan so you can get the right systems and processes in place to keep projects moving forward.

Be more intentional than ever with your goal setting. Pre-COVID, it was easy to pull out your usual suspects list of stakeholders and engagement methods, then hope for the best. But now you need to be more hyper-targeted in your approaches, since online or remote methods won't deliver the same result as in-person activities. Some things will be better, and some things will be worse, so you need a clear, specific plan for how you will navigate those constraints and opportunities.

Here's what you could include in your plan:

Goals

What goals would you like to achieve? How can you adapt your original goals to the work-from-home environment? What outcomes do you need for it to be a success?

Resources & tools

List out all the activities and communication you normally do in-person. You'll need to find remote alternatives for each. What resources and tools do you have at your disposal? What's missing from your toolkit and skillset that you'll need to achieve your goals as a remote team?

Make sure you have the following essential tools for remote work and collaboration, like:

- **Real-time chat software:** Slack, Skype, Discord and Microsoft Teams
- **Video conferencing tool:** Zoom, Google Hangouts, Skype and Slack video calls
- **Cloud-based storage:** Google Drive, Dropbox and OneDrive
- **Stakeholder management software:** Simply Stakeholders and Darzin
- **Staff training/documentation:** Stored in the cloud, published on a password-protected Google site, or accessible through your project management software

Policies

What new workplace guidelines and policies do you need in place to deal with the work-from-home environment? How has privacy, security and expectations of employee behaviors changed?

Adaptations

How will a remote stakeholder approach impact your different stakeholder groups (especially those that prefer offline events and communication)? How will you adapt to accommodate their needs?

Constraints

What are some things that could limit your team's ability to achieve their goals while working remote? What resources don't you have access to that might hold you back? Consider constraints like internet speed, software programs, computer hardware, dedicated office space, distraction-free time (if there are others at home during work hours) and comfortable/ergonomic furniture.

Budget

How will working remotely reduce your costs? What tools and equipment do you need to budget for so that your team can work and collaborate effectively from home? What's available out there that's free or low cost? What can you provide for your employees so that they're not left with out-of-pocket costs?

Opportunities

What are some opportunities that may arise from working remote, and how can you take advantage of them? How might you continue to improve your stakeholder engagement practices? How can you reduce complexity for a simpler, more streamlined approach? What new methods, routines or tools would you like to experiment with? How can you ensure your team comes through stronger, happier, more balanced and more engaged?

Once you've got your strategy sorted, it's time to implement it - from collaboration tools and cloud access to security and privacy measures.



2 Find new ways to collaborate and engage

First of all, it's important to acknowledge the communication and collaboration barriers you now face:

- Digital communication does not equal face-to-face
- Remote collaboration probably won't be as effective
- Emotion, tone and sentiment don't always translate well in text
- You miss out on a lot of body language and context when you're on a call
- You can't just drop by your colleague's desk anymore for a quick chat -social or work-related
- It's much harder to collaborate because you can't see what your team members are doing (are they doing deep work, or is it okay to interrupt them?)
- Back-and-forth emails are time-consuming and slow down your progress

Use emojis & gifs

If you don't already, try incorporating emojis and gifs into your written communication. A smiley face or silly gif can help to convey the tone and intent behind your words, and make talking to your colleagues and stakeholders a lot more fun.



Only meet if necessary

For in-person meetings, first ask whether you truly need to meet. Instead, could it be a Slack conversation or collaborative Google doc? This could be more efficient - and it'll be appreciated by those who are experiencing Zoom fatigue. That said...

Embrace video

For meetings you can't avoid, a video call via Zoom, Skype or Hangouts is usually best. Video helps create a more connected experience that's closer to the real deal.

Use collaborative tools

In some cases, you can create a richer meeting experience by adding a digital whiteboard tool like Miro or Sketchboard, or working out of a live shared document like Dropbox Paper or Google Docs. Or open up your stakeholder management tool (like Simply Stakeholders) and update it while you chat.

Encourage cameras on

Of course, not every stakeholder or employee will want to switch their camera on. Video might distract some people, or they might feel uncomfortable about sharing the space they're working in. Gently encourage people to switch their videos on (especially if you're trying to embed this as a cultural norm) but don't pressure anyone who doesn't want to.



Share your notes

One common issue that's come up for stakeholder professionals who have switched to video calls is that meetings are less visible. You don't see Rebecca, Casey and Adam get up and enter a meeting room - you might not even know they had a meeting planned. That means it's less likely to come up in conversation, and you may miss out on important or useful information. To compensate for this, you should record any important talking points and decisions made, and make sure they are shared with your team.

Record stakeholder meeting notes in shared software

For any stakeholder meetings conducted remotely, ensure that you take clear notes and attach them to the stakeholder record in your software. That way, your colleagues can access the information when they need it.

Don't overlook face-to-face completely

Why haven't we moved to all-digital stakeholder engagement sooner? It's more cost-effective and often more efficient.

The fact is, some stakeholders and team members just won't adapt well to digital. Accept that you might struggle to reach and connect with some people, and just continue to do your best with the tools you have. And get ready for face-to-face options to return.

Many stakeholders and teams are feeling starved of social contact and will welcome face-to-face interaction once it's safe. So, it's important to realize that traditional methods of work and stakeholder engagement will come back. Be agile and ready to adapt your workplace and engagement strategy when it's safe to do so.

3 Set up cloud and tool access

Most organizations have been using a range of cloud-based tools for years now, mixed in with local infrastructure. But switching to remote work does mean that you may need to upgrade some of your tools so your team members and stakeholders can access the information they need from home. That includes software, documents, spreadsheets, contact records and emails.

A few tips for making sure all your cloud-based ducks are in a row:

- Choose cloud-based apps where available
- Check that all your key systems and information are accessible through the cloud
- Ensure that backups are in place in case a server goes down or a hard drive stops working
- Get clear on what software and systems you're using - and for what purpose (too many options can be confusing and cause version control issues)
- Check your hardware and software requirements to minimize compatibility issues



4 Create a remote work policy

A remote work policy is a written document that outlines all the guidelines, rules, rights and procedures for your employees to follow while they're working from home. It'll clear up any expectations and reduce confusion, hopefully making the transition to remote as simple as possible.

- Your remote work policy may cover:
 - Remote work best practices
 - Cybersecurity requirements (including a VPN)
 - Working hours
 - Working location essentials
- Tips on how to apply for reimbursement or claim tax expenses (like a portion of rent, electricity and water bills)
- Legal rights
 - What work should still be completed onsite (and when)
 - A list of tools for communication and collaboration
 - A list of hardware requirements (laptop/computer, internet connection/speed, web cam, microphone, etc.)
 - Expected communication channels
 - Times/days for social and work-related group calls
 - Reporting processes for worked hours, holiday leave and sick leave
 - Allowances for costs like internet usage, chair, desk, software and hardware

5 Update your training/onboarding

Need to onboard a new hire while working remote? Make sure your usual onboarding processes are available via a learning management system or knowledgebase. You might need a combination of notes/documentation, video/audio tutorials, screenshots or something else. Kick things off with a video call to personally welcome them to their new role and ensure they know where to go if they have any questions.

You should also ensure your existing team members have access to training on how to work from home. This can help make it a much smoother transition for them, especially if they're new to remote work.

Finally, you need to account for training and upskilling that might normally happen in the office. Adapt any planned training sessions so that they can be accessed online, or choose a training provider that offers this option. With up-to-date online training systems, your team will continue to build on their stakeholder management skills, even while they're not in the office.

6 Get privacy and security sorted

The right security measures will help to protect your staff, your stakeholders and your intellectual property.

Some organizations took months to allow access from home due to security and privacy concerns, while others made the leap immediately (with little thought to how security might be impacted). Whatever camp you fall into, it's important to check your security measures and do everything you can to minimize the risk of a breach. Since your team will likely be using different hardware and network systems at home, it's critical that you do this as soon as possible.

If your security and privacy policies were written some time ago, you'll likely need to update them to reflect the current work environment. Revise your policies and guidelines to include remote work conditions and any new digital solutions you've adopted.

Share security best practices like:

- Don't use public wi-fi
- Reset your default wi-fi password
- Always create unique, secure passwords for each account
- Use two-factor authentication on accounts where possible
- Use a password manager to store and manage shared passwords
- Share files using secure methods
- Install firewalls and virus checkers
- Use a VPN
- Limit other people's access to your devices
- Don't click links in emails from unknown senders
- Regularly check and update software to the latest version
- Enable automatic software updates
- Choose secure, cloud-based storage over local storage

Provide staff with appropriate software access and/or devices that can make their home setup more secure, like a VPN. This will hide your staff members' IP address, encrypt their data transfers and mask their location. Provide user accounts so that your team can also access a reputable firewall and virus checker for their home devices.

While you're reviewing security and privacy, it's also a good time to ensure you're compliant with GRPR/privacy legislation. If you haven't already switched over from using Excel spreadsheets and other insecure methods of data protection, you really need to do it now.

You will have a GDPR and Privacy legislation compliance nightmare on your hands if stakeholders' personal information is stored on various home computers or portable devices.

7 Stay focused on your people

If ever there was a time to put the focus on your people, it's now. Many employees are frustrated and low on motivation. It's been a tough year, with more challenges on the horizon.

Be aware that the stakeholders your team will be interacting with will have their own stresses and challenges following the isolation or disruption caused by COVID. On top of this, they're learning to adjust to the technology load of online engagement. It might be harder than usual for some employees and stakeholders to interact - which will be harder on your team.

Fortunately, there is a lot you can do internally to help your people. Good managers will use strategies to boost engagement and motivation while empathizing with the challenges the team is facing. Encourage your team to share what's on their minds, and create a safe digital space where they can ask for advice, get help or just vent their feelings.

Another issue impacting stakeholder teams is social isolation. Everyone has experienced massive disruption to their usual routine, events and socialization. People are feeling isolated from their friends, family and team members - even the introverts on your team might be feeling starved of human contact. This isolation and mental state could show up in their work.

Some simple ways to help them overcome the feeling of isolation include:
A few tips for making sure all your cloud-based ducks are in a row:

- Set up a regular virtual team coffee break session
- Co-work over Slack or Zoom
- Host Friday afternoon online multiplayer games
- Send surprise care packages in the mail (these don't have to be expensive)
- Create a social channel on Slack for non-work related topics (like a virtual watercooler, a place to share memes, or somewhere to post photos from your daily walk/ride)

There's so much more you can do. Experiment with different ways to socialize and connect virtually, and see what works for your team. And be sure to change it up to keep it novel.

Finally, make sure you support your team so they can enjoy a greater work-life balance. The lack of commute has given many people back extra time in the day to spend time with their family or do things they enjoy. But at the same time, working from home has made it harder for many people to separate work and life. Monitor work hours to ensure your team is getting enough downtime and encourage them to pursue interests outside of work.



8 Seize the moment and create change

As stakeholder engagement professionals, now is the time to step up and take advantage of the opportunity to set your vision and create positive change, while there's more plasticity across industries than ever before.

Nothing is certain - never more so than right now. But it's comforting to see that stakeholder teams can adapt and even do well when they focus on people's needs first, supported by technology, systems, and processes that make their jobs easier.

Try Simply Stakeholders

The right system doesn't have to be expensive, complicated, or time-consuming. With Simply Stakeholders, you can enable remote access to stakeholder data and team collaboration, without getting your IT team involved.

Simply Stakeholders is designed to be simple, affordable, and remote-friendly. Features include sentiment analysis, stakeholder mapping, task management, text messaging, automatic tagging, attachments and so much more.

And set up is easy - just take a few minutes to import your spreadsheet, and you're ready to go.

Plans start from \$0 so you can get started and scale up as you grow. [Sign up today!](#)

Let the chaos come (because it will come!) and know that you have one place your whole team can come for information and access they need to continue working with stakeholders - no matter where they work.

Bonus: Remote Stakeholder Management Checklists

Company Checklist

Get these basics sorted to set your organization up for remote success.

	Remote work policy
	Remote work training
	Remote work strategy
	List of software/tools and uses
	Security policy

Staff Checklist

Pass this checklist onto your team to help them settle into remote work. Some of these are essential, while others are nice-to-haves or best practices.

	Start-the-day ritual
	End-the-day ritual
	Plan brain breaks
	Plan movement breaks
	Set up a dedicated/separate space for work
	Get essential hardware: computer, monitor, keyboard and mouse, web cam, microphone and lighting
	Ergonomic chair

	High speed internet
	Surge protection
	Back-up wi-fi/hotspot
	Professional/clear background for calls