STAKEHOLDER MAPPING

A TOOL TO ADVANCE SOCIAL CHANGE STRATEGIES

TO BE TRULY EFFECTIVE, no social change initiative can be all things to all people. Inevitably, there are some people and communities that are impacted more by the status quo and have a deeply personal stake in creating change. Some people may have critical perspective from their lived experiences and the impact the issue has on their lives. And some people might have a disproportionate level of influence in bringing about change, or their early adoption of new behaviors will motivate others to do so. Whether they have recognized "authority" to create change by virtue of their position or privilege, or "authority" based on their direct experience and front line perspective, **stakeholders have the potential to wield tremendous power both individually and collectively**.

As a result, it's necessary to understand the broad universe of people and communities affected by an issue and/or in a position to change the systems, policies and environments surrounding that issue. But it's also important to decide which segments should be prioritized, and to design strategies, messaging and calls to action that address their unique needs and opportunities.
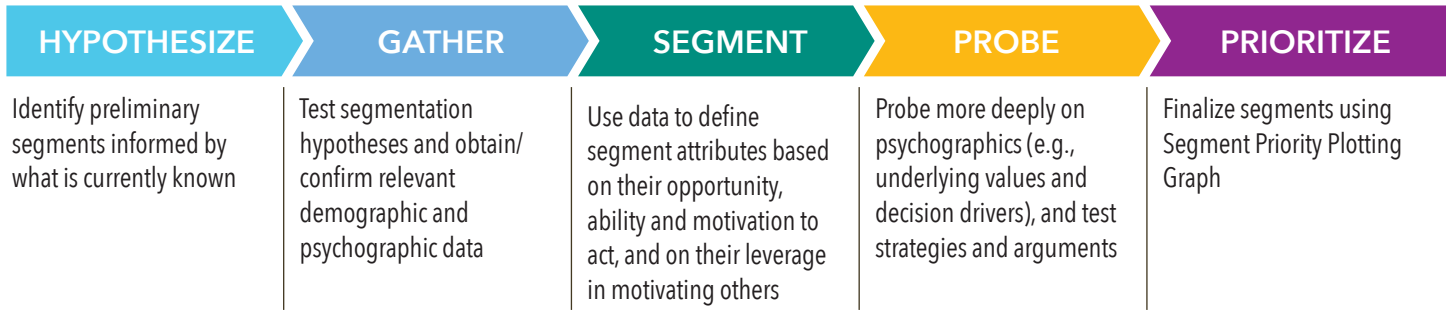
Our approach is grounded in more than 25 years of experience in **understanding not just what people think and how they act, but why**. The answer to the "why" question leads us to an examination of the deeply held underlying values that drive their decisions about what to believe and what to do.

When talking about segmentation, many people think in terms of "audiences." But at Metropolitan Group **we think of people and communities as "stakeholders," since the creation of sustainable social change requires that they be engaged not as passive recipients, but as active participants in everything**. Whether they are private individuals or public officials, stakeholders have agency and a vested interest in the outcome of any social change initiative or enterprise. They also have critical insights on both the problem and its solution. Thus, they should be central to the design and implementation of the solution. And we find that thinking of people and communities as stakeholders results in better and more authentic engagement with them, and ultimately in more effective and sustainable social change efforts.

In the pages that follow, we summarize our approach to building understanding, segmentation and prioritization, and provide templates for two basic tools we use in our work.

At Metropolitan Group we take an iterative approach (from hypothesis to prioritizing) to learn about stakeholders and to segment and prioritize stakeholders to drive strategy.

HYPOTHESIZE	GATHER	SEGMENT	PROBE	PRIORITIZE
Identify preliminary segments informed by what is currently known	Test segmentation hypotheses and obtain/confirm relevant demographic and psychographic data	Use data to define segment attributes based on their opportunity, ability and motivation to act, and on their leverage in motivating others	Probe more deeply on psychographics (e.g., underlying values and decision drivers), and test strategies and arguments	Finalize segments using Segment Priority Plotting Graph

Metropolitan Group uses quantitative and qualitative research to segment and prioritize stakeholders, and to build actionable profiles to maximize the effectiveness of efforts to reach, engage and motivate them. Central to our approach is a focus on identification of the core underlying values that drive action, making it possible to achieve not just one-time-only results but sustainable changes in behaviors, cultural norms, policies and more.

Four key criteria are at the center of our identification and segmentation of stakeholders out of the broader stakeholder universe:

OPPORTUNITY Do they have the opportunity to act? Can they take the specific actions needed to meet your goals?

ABILITY Are their barriers to action surmountable?

MOTIVATION Are their interests aligned with yours? What arguments are convincing? How interested/motivated are they?

LEVERAGE Do they have the ability to influence others to act?

Once we understand each of these factors for potential stakeholder segments, we're able to prioritize the segments based on the extent to which they are both interested and persuadable, and on their ability to wield influence to make change happen for themselves and to influence others.

STAKEHOLDER UNIVERSE

PRIORITY SEGMENTS

OPPORTUNITY ABILITY MOTIVATION LEVERAGE

STAKEHOLDER SEGMENT PROFILE MATRIX

Based on the hypothesis, we build a profile of each segment by filling information (from the gather, segment and probe activities) into this matrix.

|			
Segment (who?)			
Action(s) we want them to take			
Opportunity and ability to act			
Relevant core values			
Driving motivations/ needs			
Barriers/obstacles			
Pathways			
Leverage	Who influences them?	Who influences them?	Who influences them?
	Whom do they influence?	Whom do they influence?	Whom do they influence?

SEGMENT PRIORITY PLOTTING GRAPH

Based on the information in the stakeholder matrix, we plot the segments on this graph according to their level of interest, alignment and ability to influence change.

SECONDARY **INFLUENCE** SEGMENTS

Prove relevance to motivate increased alignment of interest, exertion of influence and/or move toward action; mitigate opposition.

PRIMARY **ACTION/INFLUENCE** SEGMENTS

Motivate to take action / exert influence on others to take action.

INTEREST ALIGNMENT

INFLUENCE
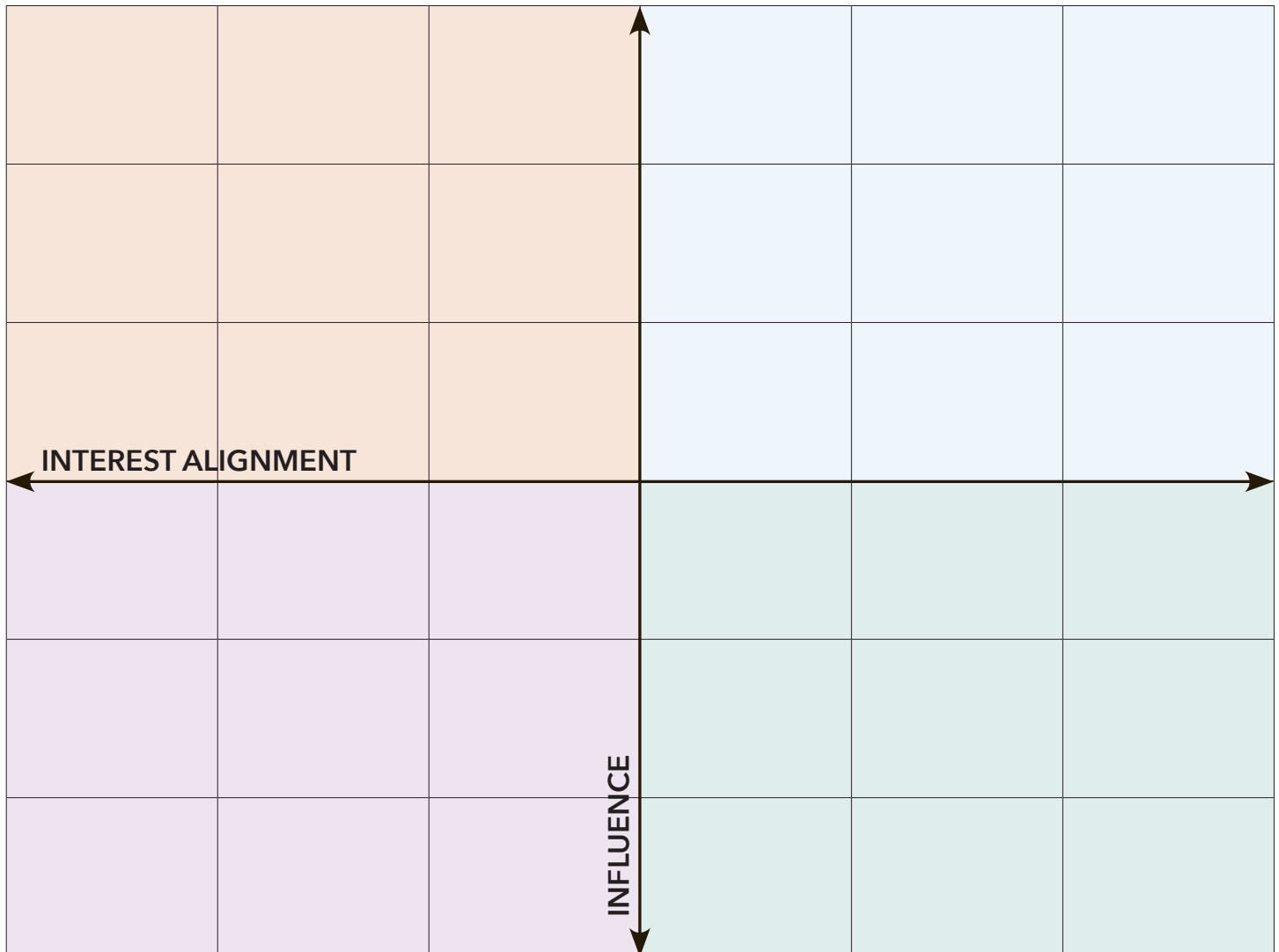
OTHERS

Not prioritized, but consider monitoring. Often will become late adopters as other segments drive norms change.

SECONDARY **ACTION** SEGMENTS

Motivate to take direct action.

RELEVANT EXPERIENCE

ABOUT METROPOLITAN GROUP

At Metropolitan Group (MG) we do two things. We directly impact social change and we build the capacity of organizations that drive social change.

About half of our work is designing and implementing campaigns and initiatives that directly change attitudes, behaviors, practices and policies. We are pioneers of public will building—creating shifts in normative community expectations to drive lasting change.

The other half is helping build the capacity of organizations that drive social change through effective strategic plans and powerful brands, raising funds, and building cultures that better help them drive social change.

SEGMENTATION AND PRIORITIZATION

MG has been using marketing research to facilitate segmentation and prioritization for behavior change campaigns for more than 28 years, with particular expertise in exploring people's core underlying values and key decision drivers. Our work delivers actionable information on why stakeholders and audiences will act, how to motivate them, whom to engage first, what arguments and channels are the most effective, what is the scale / potential impact of a segment, and other key data that informs strategy selection, message development, partner engagement, and all other aspects of campaigns. We are experts at interpreting research and using it to develop and implement strategies, tactics, messages, programs and more, to drive change.

STAKEHOLDER RESEARCH

At MG, we believe that formative research—establishing baseline measures and exploring core decision drivers—is critical to ensuring marketing success. MG has conducted hundreds of executive interviews, focus groups, discussion groups and public meetings. An underlying foundation of all our work is engaging harder-to-reach participants (pushing past the "usual suspects"), asking probing questions, and delivering actionable, strategic findings and recommendations. Our unique expertise is in designing and conducting research that identifies the core decision drivers and values that translate into powerful messages, strategic prioritization of stakeholders and audiences, identification of the most effective messengers, and design of the most effective dissemination and engagement strategies. We design, conduct and harness research to drive behavioral, practice and policy change.

In addition to traditional qualitative and quantitative methodologies, MG also uses a variety of innovative methodologies to capture data for market research and segmentation, including sentiment analysis software to explore dominant theme expression that emerges from written feedback or online forum chatter; ethnographic research, including digital ethnography approaches that engage stakeholders in capturing and reflecting their priorities and experiences using digital photography; social listening; design-based strategy charettes; process illustration that surfaces system change needs and barriers; virtual focus group technology that allows the broadening of sample sizes and inclusion of individuals who may be less able to access physical locations due to distance or physical ability; cognitive linguistic analysis to surface how language is influencing perceptions and behavior; intercept interviews to engage users and other stakeholders in situ; and gamification (digital and event-based games that stakeholders "play" to explore choices and key questions).

We have helped clients conduct and utilize stakeholder research to make segmentation and prioritization choices and have provided the data and strategic application to effectively engage stakeholders and audiences for diverse organizations ranging from the American Public Health Association and the American Library Association to the USDA Forest Service and the National Park Conservation Association. Other segmentation clients include the Sierra Club, NASA, the Robert Wood Johnson Foundation, the Ford Foundation, Oregon Health Authority, National Trust for Historic Preservation, National Youth Advocacy Coalition, and many others.

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