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Theory U Toolbook 1.1

Stakeholder Interviews

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Stakeholder Interviews



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At a Glance

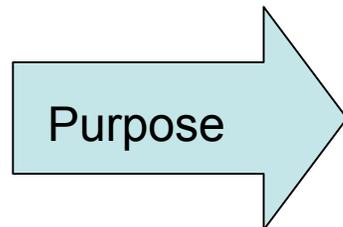
Stakeholder Interviews are conversations an individual conducts with his or her key stakeholder: customers, bosses, subordinates or peers both within and outside the organization. The interviews allow you to step into the shoes of your interviewees and see your role through the eyes of these stakeholders.

Stakeholder Interviews:

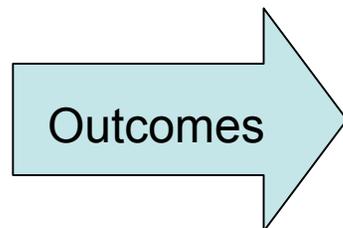
1. Purpose & Outcomes



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The purpose of a stakeholder dialogue interview is to see your work from the perspective of your stakeholders. It answers the questions: What do my stakeholders want from me? What do they need me for?



- Enhanced clarity about how my work matters from the viewpoint of my stakeholders.
- An understanding of how my stakeholders assess the value that I create for them.
- Ideas for quickly improving a situation.
- The identification of barriers and roadblocks that need to be removed.
- A better and deeper personal relationship with my key stakeholders.

Stakeholder Interviews:

2. Logistics



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People & Place

Stakeholder interviews work best face-to-face. If in-person interviews are not possible, conduct them by phone.

Time

- 30-45 minutes for a phone interview.

- 30-90 minutes for a face-face interview.

Both figures are estimates and need to be adjusted to the specific context.

- Prepare for an additional 30 min. before the interview to prepare and 30 min after review.

Materials

Use the interview guidelines (questionnaire), but feel free to deviate where necessary.

Paper and pen to take notes.

Stakeholder Interviews:

3. Process



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Preparation:



Identify the stakeholders who are relevant to your current situation or challenge/opportunity. Define/revise questions to adjust to the specific context. Schedule appointments. Decide whether to send the questions to the interviewee in advance.



Before you meet the interviewee allow for some quiet preparation or silence.

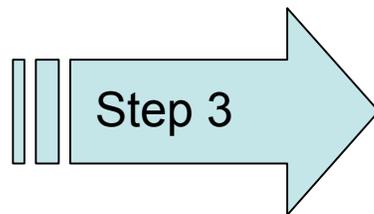
For example, take 20-30 minutes prior to an interview to relax and anticipate the conversation with an open mind and heart.

Stakeholder Interviews:

3. Process (cont.)



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During the interview, listen with your mind and heart wide open, take notes, follow the principles below. Ask questions spontaneously: Feel free to deviate from your questionnaire if important questions occur to you. The questionnaire is designed to serve you and your work—not the other way around.

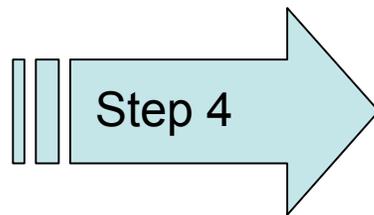
Sample questionnaire:

1. *What is your most important objective, and how can I help you realize it? (What do you need me for?)*
2. *What criteria do you use to assess whether my contribution to your work has been successful?*
3. *If I were able to change two things in my area of responsibility within the next six months, what two things would create the most value and benefit for you?*
4. *What barriers in the current systems or other issues have made it difficult for people in my role to meet your expectations?*

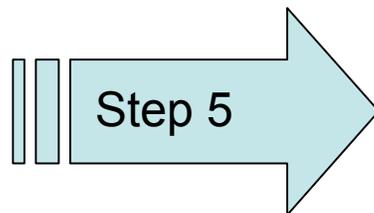
Stakeholder Interviews: 3. Process (cont.)



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Right after the interview, take time to reflect on key insights, capture your key thoughts in writing.



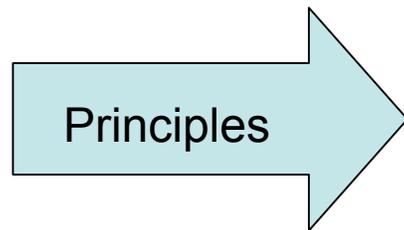
Close the feedback loop
Right after each interview, send a thank-you note to your interviewee (within 12 hours).

Stakeholder Interviews:

4. Principles



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Create **transparency and trust** about the purpose and the process of the interview; establish a personal connection early on.

Suspend your **voice of judgment (VOJ)** to see the situation through the eyes of your interviewee. What matters at this point is not whether you agree with what your interviewee is telling you. What matters now is that you to learn to see the situation through the eyes of your stakeholder.

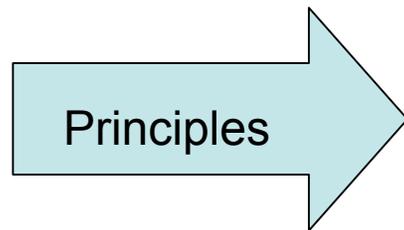
Access your ignorance (access your open mind): As the conversation unfolds, pay attention to and trust the questions that occur to you; don't be afraid to ask simple questions or questions you think may reveal a lack of some basic knowledge.

Stakeholder Interviews:

4. Principles (cont.)



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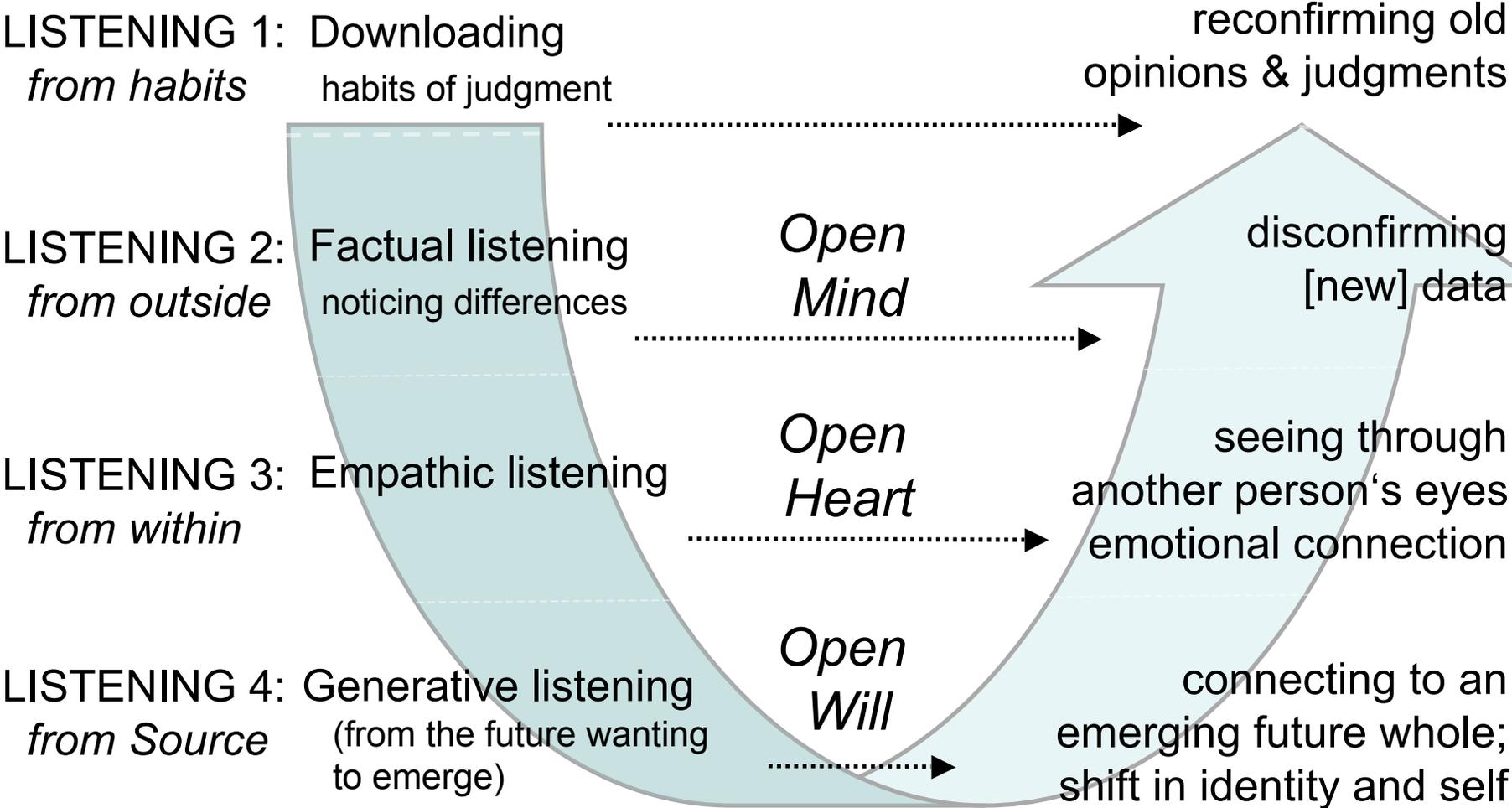


Access your appreciative listening (access your open heart): Connect to your interviewee with your mind and heart wide open; thoroughly appreciate and enjoy the story that you hear unfolding; put yourself in your interviewee's shoes.

Access your listening from the future field (access your open will): Try to focus on the best future possibility for your interviewee that you feel is wanting to emerge. What might that best possible future look like?

Leverage the power of presence and silence: One of the most effective interventions as an interviewer is to be fully present with the interviewee and the current situation—and not to interrupt a brief moment of silence. Moments of silence can serve as important trigger points for deepening the reflective level of a conversation. More often than not, these opportunities go unused because the interviewer feels compelled to jump in and ask the next question. Be courageous. Stay with the opening of the NOW.

Stakeholder Interviews: 4. Principles (cont.)



Stakeholder Interviews:

5. Sources



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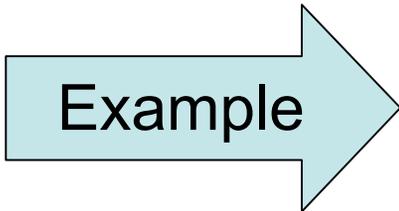
- C. Otto Scharmer, *Theory U*: Chapter 21
- www.theoryu.com, www.presencing.com

Stakeholder Interviews:

6. Example



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Example

One participant in a leadership capacity-building workshop:

“As a newcomer, I sensed that there wasn’t a lot of trust in the organization. With all these questions in mind, I was asked to do ‘stakeholder’ interviews as a preparation for a leadership seminar. The first thing I realized was that stakeholder interviews are 180 degrees different from normal conversations. No checking out and bargaining over my pre-prepared plans and trying to convince the other person. On the contrary, I had to shift my perspective and put myself into the stakeholders’ shoes: ‘How does she or he look at my job? I had to find out how I could serve my stakeholders so that they could be successful...

But then it was amazing: The interviews were incredibly helpful. They saved me months of work and communication! I learned things from the perspective of my stakeholders in this open way that I would never have heard in ‘normal communications’. Shortly after the interviews, people I didn’t know came along and said, ‘We’ve heard about these open communications you’ve had. We must tell you that they’ve created a lot of trust. How did you do that?’”