



# Key Relationship Management Tool

An additional resource to  
The Customer Response Management Handbook

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## Getting the most from the Key Relationship Management Tool

### Primary goal of this tool

To create a communications program to ensure there is effective internal marketing and PR for your project. Just ensure that everyone you've identified as interested or involved with your project can never say to anyone 'I had no idea what they were considering'.

### Background

As a conservative estimate, up to 75-80% of projects fail completely or are critically handicapped as a direct result of being poorly socialised. Politics is a powerful force in every organisation with more than two people! This tool will help you minimise the political issues by having a simple plan to ensure you don't inadvertently miss socialising your activities with someone in your organisation. *The value of this tool is directly proportional to the size and budget of your undertaking.*

The form is designed to assist you as you manage a project. It is appropriate for change management projects, new initiatives or a campaign you and your group is considering and should be a specific task in your project plan.

### Directions

1. Make a list of every person who is critically involved with your endeavour: those who will be helped by it, both directly and indirectly, those who stand to be hurt either directly or indirectly by your project and those who will be neutral to your project but will also be affected or touched by either the activity, final or on-going results.

Do not consider categorising them in any way at this stage, just list as many as you can think of. You may wish to brainstorm this with your team and manager to ensure you've thought of as many people as are appropriate.

If you are new to an organisation or department ask your manager to help, or find someone who has been in the organisation for a long time and is capable of knowing these types of details.

(For instance, you may interface regularly with the PA (personal assistant) to one of the senior team. They may be in the know and be willing to give you their thoughts.)

2. Once you have the overall list, divide it into three major groups:
  - (a) **Group 1 – Critical:** these are the people who *must* join you or sign off on your activities. If it is a large project this group will include your steering committee, perhaps even your executive management. They are the most powerful and politically influential in the organisation with regard to your initiative. They must support you with time and sometimes budget. These are the groups who will directly benefit from the results of your activities.
  - (b) **Group 2 – Important:** this will include people who may or may not directly benefit or contribute to your budget or give you permission in writing, but they are powerful enough to help 'grease the wheel' for you, slow your progress down or interfere with your priorities. They are politically powerful and influential.
  - (c) **Group 3 – More than Social:** these people won't make or break your project, but they may have influence over those who can and should be included in this exercise. A communications strategy will be created for each group of various frequency and disclosure; this one will have the fewest contacts and be of the shortest duration or length. But they will be kept informed and be invited to celebrate your success.

Once you've divided your list into the three groups there are two power levels. So separate each of the groups into high and low power levels. Next evaluate each of the groups into the final three categories

1. Have something critical to gain from the project
2. Will be neither helped nor constrained by your project
3. Have something to lose – may try to slow your project down

Looking over the way in which you've segmented your original list should help suggest your communications program to these individuals over the life of your project. Communications tools may include:

- Creating a special project newsletter
- Sending e-mail updates of progress
- Steering committee updates
- Department updates
- Celebrations

Although there is no fail safe way to ensure your project or initiative is successful, one of the most important activities you can plan and execute is an internal marketing plan to ensure everyone in the organisation is at least aware and at best involved in helping make your project the best it can be.

## Group 1 — Critical

### Key Relationship Management Tool

**Project name:** \_\_\_\_\_

**Project executive:** \_\_\_\_\_

**Date:** \_\_\_\_\_

#### Have something critical to gain from project

<b>High power 'Change agents'</b>			<b>Low power 'Supporters'</b>		
Enter names			Enter names		
<b>Tactics:</b> <ul style="list-style-type: none"> <li>Involve as individuals and groups</li> <li>Delegate responsibility</li> <li>Assign tasks and resources</li> </ul>			<b>Tactics:</b> <ul style="list-style-type: none"> <li>Work to increase power and influence</li> <li>Actively communicate vision, engaging feelings as well as ideas</li> <li>Create critical mass</li> <li>Clarify specific tasks and behaviour change</li> </ul>		

Distribution getting together — align everyone and justify the servicing

#### Neutral contacts: Will be neither helped nor constrained by project

<b>High power 'Gatekeepers'</b>			<b>Low Power 'Spectators'</b>		
Enter names			Enter names		
<b>Tactics:</b> <ul style="list-style-type: none"> <li>Handle individually — and form alliances</li> <li>Consult early and continuously</li> <li>Lobby and keep informed at every stage</li> </ul>			<b>Tactics:</b> <ul style="list-style-type: none"> <li>Keep informed — two-way</li> <li>Low-key communications</li> <li>Avoid antagonising</li> </ul>		

Acknowledge support — resolve queries and concerns quickly

#### Have something to lose — may try to slow or block your project

<b>High power 'The Resistance'</b>			<b>Low power 'Refugee'</b>		
Enter names			Enter names		
<b>Tactics:</b> <ul style="list-style-type: none"> <li>Handle individually — and form alliances</li> <li>Open up feelings and where possible problem solve conflicts together</li> <li>Isolate from mainstream — not appropriate</li> <li>Divert to other activities — not appropriate</li> </ul>			<b>Tactics:</b> <ul style="list-style-type: none"> <li>Show compassion</li> <li>Explore feelings, reduce pain</li> <li>Provide structure, direction</li> <li>Channel energy constructively</li> </ul>		

*You may wish to recreate this form for your own organisation. Enter the names that are pertinent. You may find colour coding the boxes with a highlighter through specific names helpful in managing them.*

**Key Relationship Management Tool**

**Project name:** \_\_\_\_\_  
**Date:** \_\_\_\_\_

**Project executive:** \_\_\_\_\_

**Have something critical to gain from project**

High power 'Change agents'			Low power 'Supporters'		
Enter names			Enter names		
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**Group 3 — More  
Than Social**

**Key Relationship Management Tool**

**Project Name:** \_\_\_\_\_  
**Date:** \_\_\_\_\_

**Project executive:** \_\_\_\_\_

**Have something critical to gain from project**

<b>High power 'Change agents'</b>			<b>Low power 'Supporters'</b>		
Enter names			Enter names		
<b>Tactics:</b> <ul style="list-style-type: none"> <li>• Involve as individuals and groups</li> <li>• Delegate responsibility</li> <li>• Assign tasks and resources</li> </ul>			<b>Tactics:</b> <ul style="list-style-type: none"> <li>• Work to increase power and influence</li> <li>• Actively communicate vision, engaging feelings as well as ideas</li> <li>• Create critical mass</li> <li>• Clarify specific tasks and behaviour change</li> </ul>		

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