

# The Stakeholder Game: Managing Alignment



## Summary

Amber Collins, Scott Shorson and our guest discuss stakeholder alignment in CX projects, emphasizing engagement, risk management, and the role of customer service in loyalty.

### Questions Answered

- What are the key steps to ensure alignment among stakeholders in a customer loyalty program?
- How can companies identify and involve hidden stakeholders in loyalty program projects?
- What are the signs that a team is misaligned in executing a customer loyalty initiative?

### HIGHLIGHTS

**On Project Kickoff:** “The most important thing when you are kicking off a project is making sure all the right key stakeholders are in the room from the get-go. You need their buy-in to along with the project.” — Emily Grill [01:39 - 01:50]

**On Stakeholder Engagement:** “It's really important to get everybody on board from the beginning so that they feel like they have that seat at the table to speak about their experience or, you know, any risks that they see versus bringing them in later on.” — Emily Grill [03:00 - 03:15]

**Identifying Hidden Stakeholders:** “Think about it from that perspective, that allows you to kind of think of through, like, oh, we forgot Susan, and we need to bring Susan into the conversation to make sure that she's on board.” — Emily Grill [03:51 - 04:05]

**On Pre-Meetings:** “I like to kind of pull Susan off to the side first to have, like, a pre-meeting with her and say, hey, Susan, you know, we've started this project, as we were going through it, we realized you're really a key stakeholder in this, and this is what we need from you.” — Emily Grill [04:50 - 05:05]

**Signs of Misalignment:** “People just being quiet in meetings and kind of just going with the flow when they normally wouldn't.” — Emily Grill [06:17 - 06:25]

**On Customer Service Alignment:** “You really need to help train those customer service representatives, help them understand what is the value of the program and what is the benefit that the member is getting.” — Emily Grill [20:41 - 20:55]

## TRANSCRIPT

**Amber Collins [0:04 - 0:40]:**

Welcome back to CX Anonymous, the series where we provide tactical advice on successfully executing customer experience. We don't care who you work for, just how it got done. On this series of CX Anonymous, we're continuing the discussion of the stakeholder game. We all have to play it to get our initiatives out the door. I'm your host, Amber Collins, product marketing manager at Annex Cloud. Scott Shurson, product solutions director. And our guest today is Emily Grill, marketing and digital strategy professional. So thanks so much for joining us. Please tell us a little bit about yourself, Emily. Awesome.

**Emily Grill [0:40 - 0:59]:**

Thank you for having me. A little bit about my background. I, you know, started in merchandising and headed over to consulting for retention. I have a lot of previous experience working with several different, you know, stakeholders in the game and trying to get a project out the door. So I'm really excited.

**Amber Collins [0:59 - 1:38]:**

We're so excited to have you. So, of course, this season's ongoing topic, managing stakeholders, has focused on quite a few aspects. But the biggest common theme that I think we've seen here is alignment. And just like a car, you get your alignment when you pull it off the lot, but you get down the road far enough and you're going to need to pull over and get another alignment. So, Emily, I would love to hear from you. How do we get and stay aligned in a project for customer experience stakeholders, which we know is highly cross functional, it's highly impactful, it's highly visible. So how do we get and stay aligned?

**Emily Grill [1:39 - 2:36]:**

Yeah, definitely. So I think this is, to me, the most important thing when you are kicking off a project is making sure all the right key stakeholders are in the room from the get go, you need their buy in to along with the project. So without having the right people in the room from the start, there's going to be a lot of, like, questions and, you know, the game of what is the objective? What are we, you know, trying to accomplish along the way that are going to be harder, a harder hurdle to get over. So I think the most important thing is starting with that, you know, kickoff session with all key stakeholders so that, you know, might be everybody from an analyst level role that is

doing day to day execution all the way up to your c suite just to make sure everybody in the room is aligned on what is a project goals, what are the project objectives. So at the end of the day, you have that to go back to and center around so that you're not driving off course, as you mentioned, Amber.

**Scott Shurson [2:37 - 3:00]:**

So just to clarify that a little bit, when you're saying that the start of a project, because obviously annex cloud we work with as a product, which is a part of the overall project. You're talking about specifically the project from its initial genesis. We want to do a thing. Not when we're starting to bring in third parties or outside consultants. You're talking about. I have an idea. Bring everybody together, right?

**Emily Grill [3:00 - 3:39]:**

Yeah. That's a great clarification, Scott. And I think, yes, it's from the get go. Like, we want to launch a loyalty program. Who are the key stakeholders? You need to get involved so that everybody knows, to your point, like, we want to try to outsource this part, or I. It's gonna take these internal resources to do the next part. So it's really important to get everybody on board from the beginning so that they feel like they have that seat at the table to speak about their experience or, you know, any risks that they see versus bringing them in later on. Then it's really hard to get people on board and to move forward.

**Scott Shurson [3:39 - 3:51]:**

There any tips and tricks that you recommend for finding those, like undercover or hidden stakeholders? You know, people that you don't think about automagically? What do you do to help align people with those?

**Emily Grill [3:51 - 4:26]:**

Yeah, the way I always think about it is like, how is this specific task or action going to impact the company? So it's less about you and how it's going to impact your role. But if we decide to bring in a third party as an example, how will that impact the team that I might work on, how will it impact, you know, our technology team? How will that impact finance? So if you think about it from that perspective, that allows you to kind of think of through, like, oh, we forgot Susan, and we need to bring Susan into the conversation to make sure that she's on board. Yeah, if you think about it that way.

**Scott Shurson [4:26 - 4:34]:** So now you've brought it. So let's say you forgot about Susan. Like everybody, it happens, right? So Susan gets brought in a month later.

**Amber Collins [4:34 - 4:36]:** Sorry, Susan. We love you.

**Scott Shurson [4:36 - 4:50]:** Sorry. You brought Susan in. Now she's got a different perspective because she wasn't a part of that original alignment. Is it more about getting Susan on board, or is it about the realignment to the overall project? What's the better approach?

**Emily Grill [4:50 - 5:49]:** Yeah, I would, you know what? I would say both what I personally like to do, and I know everyone has a different working style, but from my experience, I like to kind of pull Susan off to the side first to have, like, a pre meeting with her and say, hey, Susan, you know, we've started this project, as we were going through it, we realized you're really a key stakeholder in this, and this is what we need from you. What are your concerns with what we've done already so that we can better prep for that conversation with the rest of the key stakeholders to get that, if needed, realignment or just alignment from Susan? It's really helpful to bring them in kind of separately first so that they feel like their voice is going to be heard in the session. And it doesn't come across as defensive, which it can quite easily. And I've been there. It's happened. It can become defensive if they feel like, well, my voice wasn't heard. Well, I didn't get to see this beforehand. So it's better for a pre conversation?

**Amber Collins [5:49 - 6:16]:** Yes. I think that it's kind of knowing the answer before you put them all in the room because you've done that pre work and we've spoke about that on previous episodes. But really, you think that you've done this work, you think that you've got this, you think that you've looked at your risks? Emily, what are some of the signs that you still don't have alignment? How do teams act or respond? We spoke about defensiveness just now. How do teams respond if they're out of alignment? What are those signs?

**Emily Grill [6:17 - 7:15]:** Yeah, I would say based on my experience, it's, you know, people just being quiet in meetings and kind of just going with the flow when they normally wouldn't. And when I say when

they normally wouldn't, it's like, usually they come. Come with questions, come prepared, but they almost seem disengaged from the project. That's. That's kind of a, I guess, more visual sign to me, more non visual is, you know, you're. You're following up on emails, you're asking for advice, and they're just not responding, that, I mean, it happens and people, you know, people might get busy, so that's a good time to check in with them, too, just to say, hey, I sent this over, really want your advice. You haven't had a chance to look at it yet. Maybe, you know, maybe they're busy inside or outside of work or maybe at that point, to your point, Amber, maybe they've become disengaged or disaligned, and that's your time to kind of go back to them and say, what can we do to make sure that you're an advocate for this project?

**Amber Collins [7:15 - 7:33]:**

Absolutely. Scott. When you are creating tech validations and giving demos, what are some of the signs that you see in stakeholders across the table that it might not be resonating or it's not hitting the mark for them or they just are going to become possibly a detractor in this process.

**Scott Shurson [7:34 - 8:38]:**

Well, the first thing that Emily mentioned is just silence. We had one customer that said, if we're shouting, we're engaged. We love it. So the people who are just, like, absolutely silent, chances are they're either disengaged, as Emily mentioned, or they're second screening, they're doing something else and they're just not interested in that. When somebody's presenting, let's say, like, Emily's presenting and I'm on deck, I'm watching cameras, I'm, you know, checking chats and stuff like that so that I can text Emily on the side to say, hey, you know, speed this up, slow this down, you know, because so and so is whatever. And then I hope that, you know, she would be doing that for me as well. Because when you're presenting, you're typically trying to present and drive things at the same time. Like when I'm assuming when Emily does like her thing, she's got, you know, whiteboards and she's got, like, markers and she's, you know, aligning, creating mission statements, you know, all of these things. And I. Emily, you can talk about your tools all you want, but, you know, the person driving can't be watching as well.

**Emily Grill [8:38 - 9:26]:**

Yep. Yep. And that's a great point. Scott, too. Like, I not only having pre meetings with people who have, you know, brought in late to the project, but, like, let's say Scott and I are really

leading this project together, him and him and I having alignment so that he's that advocate in the room for me is so important. And I've, you know, seeing that time and time again, especially when I was consulting back in the day, we'd have those pre meetings with our main point of contact for the company we were working with, so that they were our advocate in the room for the company with us as consultants. Because, you know, sometimes consultants get a bad rap and people don't want to listen to them. But as long as you have that advocate in the room from the company that you're working with, it makes the conversation so much smoother and so much easier to have. Yes.

**Amber Collins [9:26 - 9:46]:**

Let's talk a little bit about those risks. If we got disengaged stakeholders, if we've got people that we're struggling to get a response for, I'd like to talk about the risk to the customer experience team, and then we can talk about the risks that it goes into once you bring in a third party vendor like annex cloud, right?

**Emily Grill [9:46 - 10:19]:**

Yep. Yep. I mean, the number one risk I can think of is time. So everybody's always on a timeline. They want to get the project done as fast and as quickly as possible. And the biggest risk is you are going to elongate the project without having those key stakeholders aligned, either from the beginning or making sure that you have those check ins along the way, because people are going to want to go back to a conversation you had two months ago. And so making sure everyone's aligned at every single checkpoint is just going to make that timeline what you want it to be.

**Scott Shurson [10:19 - 10:48]:**

I would add to that only slightly to say that misalignment can sometimes kill a project. So that line timeline becomes infinite because we didn't bring in Susan, and so now Susan's the head of it, and she wants to do a whole validation of this thing and time. And now we've spent that budget somewhere else, and now this project is dead for this year or the next. Yeah, it's, time can just be like a short two week, three week hiccup, or it can be just death to a project.

**Amber Collins [10:49 - 11:43]:**

Yeah. I mean, I think on our side as, as the vendor, by the time if you've got misalignment in your team or you've got disengaged stakeholders, obviously, you know time. We know that it takes time to evaluate and choose a enterprise level software. But

the, there's a risk here that say you've been able to close that deal, say you've been able to get your team to agree to the technology. If you've had misalignment, there's a huge risk here that you've chosen the wrong technology. There's a huge risk here that you have things that are unforeseen, that had you had that alignment, maybe the other person wouldn't have assumed that you had thought about this or assumed that this was taken care of. Then you get into something where you've got a contract signed and you've got multiple people's eyes on this project, and you have to, what? Turn around and say, oops, my bad, Emily, what happens then? What do you do?

**Emily Grill [11:43 - 13:01]:**

Yeah, you know, luckily, I think if you do all the right prep, you're not going to get to that, that worst case scenario of contract, and we can't move forward, but, you know, it might happen. There's always that chance. I have personally never experienced that, that aggressive or that, that type of scenario, but I have I mean, I've definitely gotten to the point where, I mean, people almost, and I'm just going to say they feel butthurt that they weren't brought in to the conversation or the selection process of a third party vendor. And in those scenarios, it's just reiterating what their value to the business is and to the project as well as what their role is, because those are, they might be two different things. So in those cases, too, it's always nice not having just you voicing that opinion. It might be your co owner of the project, it might be your boss, letting those people know, like, hey, this is where we really need you in the project. And this is why you might not have been involved in that selection process. It's not always the easiest conversation to have, but I think at the end of the day, if people know what's right for business, they understand where and when they were brought in.

**Scott Shurson [13:01 - 13:25]:**

Then let me ask you, because, you know, I'm in it very binary, and I, like, I just want to point at an email. I want to point at a thing and say, no, this was what we aligned on. This is, but you're the professional, so how can people more softly do that? How can I bring Susan away to the thinking of the project in a way that she feels empowered without having to, like, just, like, point at stuff and say, deal with it.

**Amber Collins [13:25 - 13:31]:**

Yeah, whistleblower. Or raise the red flag on her, you know, because that doesn't really, in the end, you still have to work together, right?

**Emily Grill [13:31 - 14:20]:**

Yes. Yeah. I think, you know, again, based on my experience, it's trying to show Susan or whomever, you know, their, their value in the project and in the business. At the end of the day, it's always coming back to, how is the business gonna, how are we gonna help the business grow, and how is this project gonna help us get there? And then if you can align on that with Susan, then it's like, okay, Susan, what is your part in that versus what is, you know, Emily's part versus what is Amber's part? And helping her see the bigger picture helps, I think, with that conversation, because then they're not thinking about me and why I wasn't brought in and why I wasn't part of the conversation. They're thinking about, you know, what's the, what's the best for company and what's the best for our business growth.

**Amber Collins [14:21 - 14:37]:**

So then let's talk about how does Susan and Emily and Amber start acting when they are in alignment? What are the signs that you've got alignment and consensus and that, you know, you've got, you've got the buy in. And how do teams behave when that happens?

**Emily Grill [14:37 - 15:14]:**

Yeah, I mean, I feel like conversations just come easier. People are more engaged in conversations. So those are some of the visual signs I would say is, you know, they want to add their input. They might be coming to you off to the side with additional ideas about how to make the project even better from conversations that, that you guys have had. And then it's also just being your advocate. So anything that you're, you know, presenting, whether it's internal or, you know, external to the third party, that person is, you know, I'm aligned. I'm on board with everything Emily has said.

**Amber Collins [15:15 - 16:15]:**

I love that. I think that that builds deeper relationships that then when the next project comes along, you've got past performance and past dynamics to work on. And it just kind of creates this snowball effect of a little power team. So I think that first time is really always hard. But I want to know, you know, because this is obviously, we do all this for the customers. We do all this to create this frontline experience that helps customers fall in love with us, helps customers fall in love with the brand, the experience, the product, etcetera. I don't want to call out brand specifically, but I think we all know teams that have put out brands that have put out things that



kind of scream misalignment. Right. Did the left hand talk to the right hand? And, you know, things like that. But let's just talk for a second about the importance of this alignment that goes from behind the scenes to out into the marketplace. And how does it affect customer experience and building that loyalty?

**Emily Grill [16:15 - 17:14]:**

Yeah, I mean, I think that's a really great point. You can tell right off the bat, and again, not naming names, but companies that obviously didn't have that all internal alignment, it's going to impact your customer engagement. So if we're talking about loyalty and loyalty in a program, if you don't have alignment in house, your customers aren't going to engage with your program and your program's not going to grow. So you'll be able to see in the data internally on the internal side that the program isn't working because of the misalignment that you had. Luckily, I would say in most cases the customer is not going to know. They're not going to see us as loyalty experts might know, but they're not going to notice a difference. They're just going to decide, you know, what, this program isn't right for me and I'm just going to go to the next place to get the program that I want. So they might also jump ship from your brand.

**Amber Collins [17:15 - 17:24]:**

How do you feel like this internal misalignment or teams that have amazing alignment impact that external stakeholder which is our customer?

**Scott Shurson [17:25 - 18:40]:**

Well, what I've experienced specifically with loyalty is the misalignment with specific groups like a customer service team is you're standing there in store, you're making that call and you're asking about it and they're like, oh, don't worry about that. Or maybe they're just going to like beep their own code just to get you through. There's no alignment on the benefit to the member, so they don't know how they're not brought along. The customer service team is not brought along, so they're not touting the benefits of there's no wifm for them, so there's no reason to talk it up. So the misalignment there, as Emily was saying, creates a disjointed member experience. I'm walking in and either I'm being told this program is crap, it's too hard for us to understand. Yeah, I agree with you that the program stinks. So, you know, I'm sorry for that here. This other code that I know will work and get you some discount or whatever, and then you're just. Because they're trying to make that experience a positive experience no matter what. Right. So

how are they doing it and how is that disengaged from the overall program and ideal? So this kind of goes back to what we were saying at the beginning. It's the alignment of everybody along that chain in order to make that customer experience at every touch point.

**Emily Grill [18:40 - 18:40]:**

Yeah.

**Amber Collins [18:40 - 19:47]:**

Yeah. And you know what? When people think about omnichannel, I think that sometimes it's missed having loyalty be omnichannel as well and empowering those customer facing teams that are creating that experience and not just relegating your loyalty to your app and not just tucking it away in the corner of your ecom and not just having your shopper card that is never connected to anything else. When you go to the grocery store, that connection there, that alignment, that digital alignment across your tech stack, across all those tests, I think people sometimes forget that loyalty is included in that. And that if you've got it relegated to this one space of your, of your customer journey, it is not reaching its full potential. And I mean, we, we know how hard it is to integrate anything and email, text, all of that stuff loyalty has to be a part of those conversations. When you think about that omni channel experience and Scott, you're, you're 100% right. I feel like sometimes it does get a little forgotten about that. You may want to use your points when you go to the customer service desk in the store that you earned when you did the online order order from the mobile app.

**Emily Grill [19:47 - 20:41]:**

Yeah, I I completely agree. I think. I mean, it's a great point to bring up customer experience and customer service, because if they're not your advocates, I mean, your number one advocate is going to be your customer. At the end of the day, that word of mouth is so important. The first line of defense is always the people who are boots on the ground and the people who are, you know, customer service representatives. So as Scott mentioned, if they're just like, oh, you know, the program, isn't that. Isn't that great? Let me just give you this other code. You're not going to see the engagement you want in the program. So you really need to help train those customer service representatives, help them understand what is the value of the program and what is the benefit that the member is getting. And I've seen this time and time again where, you

know, customers that I've worked with have not thought it's that important and then realize later on that it is. Or ones that have trained their customer service from the get go, and their program has grown exponentially faster.

**Scott Shurson [20:42 - 21:41]:**

And I would add on top of that, because Amber and I are focused on loyalty, but this extends to other projects as well. You bring on a new ERP, you bring on a new product, warehousing software or something like that. And if it's not aligned with everybody, then again, your frontline person is standing there with a customer saying, the online shop says that you had three of these in stock. I want one of them. You're like, warehousing is wrong. And they're telling the customer that they don't have that, and they just made this trek, maybe even across town, to get something. So alignment isn't just a loyalty thing. It is alignment the same groups across the board. And like you said, building on that relationship for everybody and understanding how everybody's interconnected builds a community within that where we can think about everybody and think about the organization as a whole, because everything matters to the customer at the end of the day.

**Amber Collins [21:41 - 23:36]:**

Yep, I absolutely agree, again, with a lot of these conversations. I mean, we could talk all day. This is definitely a passion of this group. And, you know, I think that we have all experienced this not only as professionals, but also as consumers. And so let's wrap up today's episode with a couple takeaways. And I really want to call out that, you know, I sort of wrote down sort of right people, right impact, right value. And getting that alignment is going to have those right people in the room helping them understand that that right impact to themselves and the customer to provide that right value that aligns up with those organizational goals. And as we just talked about, I mean, that comes from getting insights from merchandising and cs and warehousing all the way up to that pie in the sky aspirational strategy that our leadership wants us to get on board with. And so that was something that, for me, you know, we could say it all day, we say it all the time, but in practice, sometimes it's really hard. But I think that thinking about it is sort of like a framework of what's in it for them. What's in it for the company is a great way to make sure that you've got all those important, very important voices in the room. And so I also wanted to call out some of the signs of misalignment. I think that, again, this is something that we've all experienced before. You've got

somebody who is disengaged, who is normally opinionated, and they're very quiet. And it doesn't mean that they don't have an opinion. It just means that they might not be comfortable sharing it with you in this setting or with this project, or they felt disenfranchised, or they've felt slighted, because why didn't I come in five weeks ago? So, just to look for the signs of that misalignment and to really get back on track, get your car in the shop, get it realigned, get it checked out with whoever you need to get that part looked at, because you have to get things done. Otherwise, projects like this, projects like loyalty, die on the vine. And those were, those are some of the biggest things that I took away from our discussion today. So, Scott, what'd you think?

**Scott Shurson [23:37 - 25:09]:**

Scott, I think one of the first points that we made is about when to do the alignment. It's not when you're starting to think about third parties or consultants to come in the room. It's the moment you have an idea. Get everybody to align on that idea so that you're not going off track, so that if you are, I'm trying to align with a group that wants to build versus buy. Like you have that alignment from the start. The other thing is about building that culture, that snowballing effect where you are built, that culture where you are all aligned, again, to user alignment, to say, we all know who has to be involved. Anytime a new project comes on board, we've already got all of the people and we have this way of doing things that can translate not just to somebody that like us, which is in loyalty, but a new ERP, a new point of sale. It just snowballs from project to project because they all, at the end of the day, have an impact on that customer. I would say the last point that I wanted to take away from this is the customer service team. That frontline people are always going to try and make it right for the customer. So making. Making sure that they are aligned and a part of the decisions from the start means that they are better going to be serving that customer at the end of the day in the way that the organization wants. Because, again, I'm going to make this interaction good for the customer, no matter what. Emily, what were your big takeaways?

**Emily Grill [25:09 - 25:37]:**

Yeah, I mean, you guys, I mean, hit a lot of the good takeaways you did. I'll just add to it that, you know, having. Yeah, having the right people in the room is, is really, really important and taking it along the journey. So it's not just one and done, one meeting and it's over. You need to consistently remind the

group of the goals and objectives of the project to make sure that you're hitting those at the end of the day.

**Amber Collins [25:37 - 25:45]:** Absolutely. You know what I think, to Emily's point, you know, I think a lot of us want to be independent, but we don't go anywhere without each other.

**Emily Grill [25:46 - 25:47]:** Yeah.

**Scott Shurson [25:47 - 26:17]:** I think it's also important, again, to jump on that, like, car mechanic and alignment thing is an outside person like Emily can usually come in at least the first time or second time to kind of help everybody through that process because, you know, I can fix a lot of things on my car, but I can't do an alignment. Helping somebody who has that knowledge on how to do that can definitely help an organization or a company that's, you know, maybe brought in through acquisitions or through parts to figure out that process.

**Emily Grill [26:17 - 26:30]:** Yeah. I mean, yeah, it definitely builds that trust and so that the company knows, whether internal or external, that you're in good hands and that you're pushing the project forward in the best interest of the company.

**Amber Collins [26:31 - 26:35]:** Absolutely. And it is no shame in asking for help ever.

**Emily Grill [26:35 - 26:39]:** No, not at all. None of us know everything, so.

**Amber Collins [26:39 - 26:40]:** Exactly.

**Emily Grill [26:40 - 26:42]:** Definitely need that support along the way.

**Amber Collins [26:43 - 27:23]:** Absolutely. So, Emily Scott, I've had a wonderful conversation with you guys today. I think that this really hones in on the people aspect of these projects. I mean, that's what it is. Stakeholder management is the people part of everything. And it is so important, and it can be impactful whether it's negative or positive. So we just encourage everybody to continue to work on that stakeholder management. And listening to CX

Anonymous this season, six short episodes on stakeholder management with some wonderful guests. So thank you for joining us, Emily, and to our audience. Thank you for watching. And we look forward to the next episode of CX Anonymous.

**Scott Shurson [27:24 - 27:25]:** Thank you very much.

**Emily Grill [27:25 - 27:29]:** Thank you. Close.