

Understanding Project Stakeholder Planning, Identification and Engagement: A Phenomenological Approach

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This research explored stakeholder management practices by conducting qualitative interviews with 71 seasoned project managers. Through phenomenological principles and inductive coding, findings revealed inconsistencies in stakeholder planning, identification, and engagement. The research underscores the importance of early stakeholder identification using both formal and informal techniques. Additionally, it identifies a gap between academic literature and actual practitioner methodologies, particularly regarding stakeholder registers, mapping, and value propositions. The study suggests a need for structured and standardized stakeholder management strategies, especially given the evolving stakeholder dynamics in projects. The findings offer actionable insights for professionals and organizations seeking to improve stakeholder management techniques.

Keywords: stakeholder management, stakeholder engagement, stakeholder identification, stakeholder prioritization, project management, program management

INTRODUCTION

Within the project management discipline, effective stakeholder management is considered a critical determinant of project success (Project Management Institute, 2021). However, gaps between theoretical best practices and real-world application of stakeholder management strategies are prevalent, leading to potential misalignment between project goals and stakeholder expectations. This disconnect can adversely impact the success of projects and, in turn, organizational performance. This study aims to bridge this gap by delving into the lived experiences of project managers in managing stakeholders, offering valuable insights into the complexities and nuances of stakeholder management in practice.

Stakeholder management has been extensively studied, with a wealth of literature exploring various themes and strategies (Nguyen, Mohamed, & Panuwatwanich, 2018). Stakeholder theory, a well-established management framework, posits the importance of addressing the broader interests of stakeholders, extending beyond the sole focus on shareholder value (Donaldson & Preston, 1995; Freeman, 1984). Despite its wide acceptance, debates persist around its application, particularly the scope and definition of stakeholders, prioritization of stakeholder interests, and the relationship between stakeholder management and corporate social responsibility (Freeman, Phillips, & Sisodia, 2020; Harrison & Bosse, 2013; Mainardes, Alves, & Raposo, 2011; Orts & Strudler, 2009).

While stakeholder theory provides a solid foundation, applying these theoretical principles in real-world settings often presents challenges. Notably, using tools such as Stakeholder Management Plans (SMPs) is inconsistent, indicating a significant gap between theory and practice. Moreover, the importance of context and project specifics in developing stakeholder management practices has been underscored, suggesting a need for more adaptive, context-based approaches.

This study employed a qualitative research methodology to address these issues, conducting open-ended interviews with 71 experienced project managers. The study explored the stakeholders' identification, prioritization, and management practices in various project contexts through a phenomenological lens. The findings shed light on the complexities of stakeholder management in practice, providing a richer understanding of the field and offering valuable insights for professionals and organizations seeking to enhance their stakeholder management strategies.

This study seeks to address the following research questions:

1. How is stakeholder management planning conducted, and how is the process documented?
2. Who are the project stakeholders, and how are they identified?
3. When are stakeholders identified, and by what method?
4. How are stakeholders prioritized and managed to achieve optimal engagement?

This paper is organized as follows: after this introduction, we present a review of the relevant literature on stakeholder management, setting the groundwork for the study. We then detail our research methodology, including data collection and analysis processes. The findings section presents and discusses the key themes that emerged from the analysis of the interviews with project managers. The paper concludes with a critical examination of the research gaps, the implications of the findings, suggestions for future research, and the limitations and potential biases of the study. By examining stakeholder management practices and identifying effective strategies, this study offers valuable insights for professionals and organizations seeking to enhance their stakeholder management capabilities.

LITERATURE REVIEW

The stakeholder concept is fundamental to management theory, describing the individuals and groups with a legitimate interest in the organization and its activities. The idea of stakeholder management has gained considerable attention since its inception in the 1980s as organizations increasingly recognized the need to balance the interests of various stakeholders to achieve long-term success (Donaldson & Preston, 1995; Freeman, 1984; Harrison, Felps, & Jones, 2019). A stakeholder is "any group or individual who can affect or is affected by the achievement of the organization's objectives" (Freeman, 1984, p. 46) or those with a legitimate claim on the firm's resources, be based on legal, moral, or ethical grounds (Donaldson & Preston, 1995).

Stakeholder Theory

Stakeholder theory is a management framework that addresses the interests and concerns of various stakeholders in the decision-making process (Donaldson & Preston, 1995; Freeman, 1984). The theory posits that organizations should focus on maximizing shareholder value and consider the broader interests of stakeholders such as employees, customers, suppliers, and the environment (Freeman, Phillips, & Sisodia, 2020). Table 1 provides an overview of categories and themes that dominate the stakeholder management literature.

The theoretical underpinnings of stakeholder theory can be traced back to multiple disciplines, including organizational theory, strategic management, and business ethics (Harrison, Felps, & Jones, 2019; Jones, Felps, & Bigley, 2007). The concept of stakeholder salience, proposed by Mitchell, Agle, and Wood (1997), is a central tenet of the theory, suggesting that the power, legitimacy, and urgency of stakeholders' claims influence how managers prioritize stakeholder concerns in their decision-making processes (Mitchell, Agle, & Wood, 1997).

TABLE 1
STAKEHOLDER MANAGEMENT THEMES DERIVED FROM THE LITERATURE REVIEW
WITH A SAMPLE OF REPRESENTATIVE AUTHORS

Category	Theme	Representative Authors
Stakeholder Collaboration and Participation	Involving stakeholders in decision-making processes	<ul style="list-style-type: none"> • Scherer and Palazzo (2011) • Hollmann et al. (2022)
	Establishing partnerships and alliances	<ul style="list-style-type: none"> • Bosse and Coughlan (2016) • Cleland and Gareis (2006)
	Facilitating stakeholder forums and workshops	<ul style="list-style-type: none"> • Honey-Rosés et al. (2020) • Santos, De Andrade Lima and Sampaio (2023)
	Encouraging stakeholder feedback and input	<ul style="list-style-type: none"> • Englehardt, Werhane and Newton (2021) • Erkul, Yitmen and Celik (2020)
Stakeholder Engagement and Communication	Developing a stakeholder engagement strategy	<ul style="list-style-type: none"> • Bourne (2009) • Bosse, Phillips and Harrison (2009)
	Building trust and relationships	<ul style="list-style-type: none"> • Donaldson (1999) • Berman et al. (1999) • Wicks and Berman (2004)
	Transparent and open communication	<ul style="list-style-type: none"> • Hartman (2011) • Fassin (2009, 2012)
	Active listening and responsiveness	<ul style="list-style-type: none"> • Perrault (2017) • Pirozzi (2019)
	Managing conflicts and disputes	<ul style="list-style-type: none"> • Harrison, Felps and Jones (2019) • Zietsma and Winn (2008)
Stakeholder Identification and Analysis	Identifying stakeholders	<ul style="list-style-type: none"> • Freeman (1984) • Mitchell, Agle and Wood (1997) • Project Management Institute (2017)
	Categorizing stakeholders	<ul style="list-style-type: none"> • Agle et al. (2008) • Bourne (2008)
	Assessing stakeholder power, legitimacy, and urgency	<ul style="list-style-type: none"> • Mitchell, Agle and Wood (1997); • Mitchell, Lee and Agle (2017)
	Mapping stakeholder salience	<ul style="list-style-type: none"> • Bourne (2008) • Jawahar and Mclaughlin (2001)
Stakeholder Management Ethics and Accountability	Upholding ethical principles in stakeholder management	<ul style="list-style-type: none"> • Jones (1995) • Orts and Strudler (2009)
	Ensuring accountability and responsibility	<ul style="list-style-type: none"> • Donaldson and Preston (1995) • Antonacopoulou and Méric (2005)
	Addressing stakeholder interests and concerns	<ul style="list-style-type: none"> • Frooman (1999) • Valentinov and Hajdú (2019)
	Balancing stakeholder needs with organizational objectives	<ul style="list-style-type: none"> • Barney and Harrison (2018) • Berman and Johnson-Cramer (2019)

Category	Theme	Representative Authors
Stakeholder Management Integration and Adaptation	Integrating stakeholder management into project management	<ul style="list-style-type: none"> • Cleland and Ireland (2006) • Kerzner (2014, 2022)
	Regular monitoring, evaluation, and adjustment of stakeholder management practices	<ul style="list-style-type: none"> • Project Management Institute (2021) • Kaplan, Gimbel and Harris (2016)
	Adapting to stakeholder needs and expectations	<ul style="list-style-type: none"> • Friedman and Miles (2004, 2006) • Crane (2020)
	Aligning stakeholder management with organizational strategy	<ul style="list-style-type: none"> • Elms et al. (2010) • Mainardes, Alves and Raposo (2011, 2012)

Stakeholder theory has evolved significantly since its inception in the 1980s, with key developments including the introduction of the stakeholder salience framework (Mitchell, Agle, & Wood, 1997), the identification of various stakeholder types (Bosse, Phillips, & Harrison, 2009; Bourne, 2008), and the exploration of stakeholder engagement strategies (Bourne & Walker, 2005; Boutilier & Zdziarski, 2017). Integrating stakeholder theory into project management has also been a notable development, with the Project Management Institute incorporating stakeholder management as a core component of project management practice (Project Management Institute, 2017, 2021).

There are several contrasting perspectives represented in stakeholder theory, including debates over the scope and definition of stakeholders (Fassin, 2009; Friedman & Miles, 2004), the prioritization of stakeholder interests (Jones & Felps, 2013), and the relationship between stakeholder management and corporate social responsibility (Scherer & Palazzo, 2011; Wicks et al., 2021). Despite these disagreements, stakeholder theory remains a widely accepted framework for understanding the complex relationships between organizations and their stakeholders (Englehardt, Werhane, & Newton, 2021; Harrison & Bosse, 2013).

Future research in stakeholder theory may focus on the development of new methods for identifying and prioritizing stakeholders (Ninan, Mahalingam, & Clegg, 2019; Santos, De Andrade Lima, & Sampaio, 2023), the examination of stakeholder management in specific contexts or industries (Hollmann et al., 2022; Tran, Carden, & Zhang, 2022), and the investigation of the impact of emerging technologies on stakeholder engagement (Kaplan, Gimbel, & Harris, 2016; Nguyen, Mohamed, & Panuwatwanich, 2018; Nguyen & Mohamed, 2020). Additionally, further exploration of the relationship between stakeholder management and corporate performance, as well as the integration of stakeholder theory with other management theories, may provide valuable insights for both scholars and practitioners (Johnson, Creasy, & Fan, 2016; Pirozzi, 2019; Valentinov & Hajdú, 2019).

Stakeholder Management

Stakeholder management is an essential component of project management focused on the identification, analysis, and strategic engagement of individuals or groups who can impact or be impacted by an organization's decisions, operations, or projects (Freeman, 1984; Johnson, Creasy, & Fan, 2016). This concept is rooted in stakeholder theory, as a firm's value is created and sustained through collaborating and managing various stakeholder relationships (Donaldson & Preston, 1995; Jones, Harrison, & Felps, 2018; Mitchell, Agle, & Wood, 1997).

Stakeholder Management Plan

A stakeholder management plan comprehensively outlines the strategies and actions to be taken by an organization to effectively manage its stakeholders, ensuring alignment with project objectives and

addressing stakeholder expectations and concerns (Project Management Institute, 2017, 2021). A stakeholder management plan encompasses identifying, analyzing, prioritizing, engaging, and monitoring stakeholders (Bourne, 2009; Cleland & Gareis, 2006).

Stakeholder Identification

Stakeholder identification is the initial step in stakeholder management and entails the recognition of all relevant parties that can influence or be influenced by a project (Bourne & Walker, 2005; Freeman, 1999; Yip, Phaal, & Probert, 2014; Yip, Phaal, & Probert, 2019). Effective stakeholder identification is essential for successful project outcomes, as it enables organizations to anticipate potential issues, manage risks, and develop strategies to address stakeholders' needs and expectations (Harrison & Bosse, 2013; Santos, De Andrade Lima, & Sampaio, 2023).

Best Practices

Several best practices can be employed to optimize stakeholder identification, including early engagement, continuous involvement, adaptive communication and understanding social networks (Englehardt, Werhane, & Newton, 2021; Friedman & Miles, 2004; Honey-Rosés et al., 2020). By actively involving stakeholders from the outset and maintaining open channels of communication throughout the project, organizations can foster trust, build rapport, and enhance their ability to manage stakeholder concerns and expectations (Berman et al., 1999; Wicks & Berman, 2004).

Methods

Various methods have been developed to facilitate stakeholder identification, including the stakeholder circle (Bourne, 2008), stakeholder mapping (Bourne & Walker, 2005; Donaldson, 1999), brainstorming (Kerzner, 2014), structured facilitation (Cleland & Ireland, 2006), and power grid analysis (Frooman, 1999). These methods differ in complexity and applicability. Still, they generally aim to provide a systematic and comprehensive approach to identifying stakeholders and assessing their relative importance, influence, and potential impact on a project (Bourne & Walker, 2005; Yang & Zou, 2014). See Table 2 for a comprehensive list of methods.

Tools

Several tools have been proposed to aid in stakeholder identification and analysis, such as stakeholder matrices, power/interest matrices, influence-interest grids, and network diagrams (Beam et al., 2022; Cleland & Gareis, 2006; Robson, 2004). These tools can be used with the methods above to visually represent stakeholder relationships, interests, and influence levels, enabling organizations to better understand and manage their stakeholder landscape (Bourne, 2009; Pirozzi, 2019). See Table 2 for a comprehensive list of tools.

Timing of Stakeholder Identification

The timing of stakeholder identification is critical for effective stakeholder management. Engaging stakeholders early in the project lifecycle can lead to improved communication, increased buy-in, and a higher likelihood of project success (Kaplan, Gimbel, & Harris, 2016; Tran, Carden, & Zhang, 2022). Additionally, continuous stakeholder identification and analysis throughout the project can help organizations adapt to changes in stakeholder interests or influence and respond appropriately to emerging issues or concerns (Boutilier & Zdziarski, 2017; Hartman, 2011).

TABLE 2
STAKEHOLDER IDENTIFICATION METHODS AND TOOLS

Methods	Tools
Stakeholder circle	Stakeholder matrices
Stakeholder mapping	Influence-interest grids
Brainstorming	Network diagrams
Structured facilitation	Stakeholder register
Power grid analysis	SWOT analysis
Delphi technique	Stakeholder engagement assessment matrix
Stakeholder interviews	Stakeholder relationship management software
Focus groups	RACI matrix
Surveys and questionnaires	Stakeholder analysis templates
Social network analysis	Mind mapping software
PESTLE analysis	Stakeholder radar charts

Source: Adapted from Watkins and Denney (2020)

Continuous monitoring and reassessment of stakeholder dynamics are crucial, as new stakeholders may emerge, and existing stakeholders' interests and influence may change over time (Hollmann et al., 2022; Jones & Felps, 2013). As such, organizations should adopt an iterative approach to stakeholder identification, ensuring that stakeholders remain engaged and informed throughout the project lifecycle (Friedman, 2007; Kumar, Boesso, & Yao, 2017).

Stakeholder identification is an integral component of stakeholder management, and project management professionals must be well-versed in its best practices, methods, tools, and timing. Effective stakeholder identification enables organizations to anticipate and address stakeholder concerns, manage risks, and ultimately ensure the successful completion of projects. By leveraging the available methods and tools and engaging stakeholders early and continuously, project managers can foster positive stakeholder relationships, enhance project outcomes, and create lasting value for their organizations and stakeholders.

Stakeholder Classification and Categorization

Stakeholder theory has significantly evolved over the years, resulting in several categories and classification models that provide various lenses through which stakeholders can be identified, analyzed, and managed. Power, legitimacy, and urgency are essential attributes of stakeholder classification (Mitchell, Agle, & Wood, 1997; Mitchell, Lee, & Agle, 2017). Stakeholders with power can influence the organization, while those with legitimacy can claim their involvement to be appropriate. Urgency refers to stakeholders with time-sensitive demands. The interplay of these three attributes informs the management of stakeholder relationships (Agle et al., 2008; Mitchell, Agle, & Wood, 1997; Mitchell, Lee, & Agle, 2017).

Primary and secondary classifications divide stakeholders based on their direct or indirect organizational involvement (Donaldson & Preston, 1995; Freeman, 1984). Primary stakeholders have a direct interest in the organization (e.g., employees and customers), while secondary stakeholders have an indirect influence, such as regulators and the media (Freeman, Phillips, & Sisodia, 2020).

Generic versus specific classification distinguishes stakeholders by their interests (Hartman, 2011). Generic stakeholders have a common interest in the organization, such as the local community, whereas specific stakeholders have unique interests tied to the organization's actions, like suppliers (Bourne, 2008). Legitimate versus derivative stakeholders separate those with inherent rights to engage with the organization from those whose rights stem from another stakeholder (Friedman & Miles, 2004). For example, shareholders are legitimate stakeholders, while analysts are derivative stakeholders (Fassin, 2009). Strategic and moral classifications divide stakeholders based on the organization's obligations to them (Donaldson, 1999). Strategic stakeholders directly impact the organization's success, while moral stakeholders have rights and interests that the organization should consider (Jones, 1995). Core, strategic,

and environmental stakeholders are classified based on organizational relationships (Bourne, 2009). Core stakeholders (e.g., employees and customers) are central to the organization. Strategic stakeholders (e.g., competitors) influence the organization's strategy. Environmental stakeholders (e.g., the local community or the government) are affected by the organization's actions but have little direct influence (Bourne & Walker, 2005).

Normal, derivative, and dangerous stakeholders are classified based on their potential to harm the organization (Frooman, 1999). Normal stakeholders pose minimal risk, derivative stakeholders can cause harm through their relationships, and dangerous stakeholders (e.g., activist groups, terrorists, unscrupulous competitors) can directly threaten the organization (Bosse & Coughlan, 2016).

The level of the environment classification considers the resource base, industry structure, and social-political arena to identify stakeholders (Robson, 2004). This approach enables organizations to understand the complex interdependencies between stakeholders and their environments (Zietsma & Winn, 2008). Mainardes, Alves, and Raposo (2011, 2012) proposed a classification model that includes regulator, controller, partner, passive, dependent, and non-stakeholder. This model emphasizes stakeholders' roles in the organization, offering a nuanced view of stakeholder relationships (Mainardes, Alves, & Raposo, 2011, 2012).

Researchers also explored the role of emotions and values in stakeholder classification (Bosse & Coughlan, 2016; Bosse, Phillips, & Harrison, 2009; Boutilier & Zdziarski, 2017). These studies highlight the importance of considering rational and emotional aspects in stakeholder management, particularly in complex and controversial projects (Crane, 2020; Elms et al., 2010). Lastly, the market-based approach classifies stakeholders into customer, referral, supplier, influence, recruitment, and internal markets (Harrison, Felps, & Jones, 2019). This classification considers the markets in which organizations interact with various stakeholders, providing a practical framework for managing these relationships (Kaplan, Gimbel, & Harris, 2016).

These models can be applied in different contexts and industries, aiding organizations in navigating the complexities of stakeholder interactions. Each classification model offers unique insights; therefore, organizations should consider utilizing multiple models and categorizations to understand their stakeholder landscape (Englehardt, Werhane, & Newton, 2021; Santos, De Andrade Lima, & Sampaio, 2023). By doing so, they can better anticipate and respond to stakeholder needs, ultimately enhancing their decision-making processes and long-term success.

Additionally, organizations must remain adaptable and open to change, as stakeholder relationships are dynamic and may evolve (Honey-Rosés et al., 2020; Ninan, Mahalingam, & Clegg, 2019). Continuous monitoring and reassessment of stakeholder classifications can support organizations in maintaining effective stakeholder management practices and fostering sustainable growth (Project Management Institute, 2017, 2021).

Stakeholder classification models are essential for understanding the various types of stakeholders and developing appropriate management strategies (Cleland & Gareis, 2006; Cleland & Ireland, 2006). The Project Management Institute (2017, 2021) guidelines emphasized the importance of stakeholder identification and classification in the early stages of project management. Similarly, (Kerzner, 2014, 2022) argued that effective stakeholder management is crucial for project success. Table 3 provides an overview of the stakeholder classifications observed in the literature.

TABLE 3
CLASSIFICATION CATEGORIES DERIVED FROM THE LITERATURE REVIEW WITH A
SAMPLE OF REPRESENTATIVE AUTHORS

Classification Categories	Representative Authors
Salience framework (power, legitimacy, urgency of stakeholder claims)	Mitchell, Agle and Wood (1997)
Interest in the organization (generic i.e., local community; specific i.e., tied to the organization such as suppliers or other examples)	Bosse, Phillips and Harrison (2009) Bourne (2008) Hartman (2011)
Involvement (direct or indirect)	Donaldson and Preston (1995) Freeman (1984) Freeman, Phillips and Sisodia (2020)
Environmental classification (resource base, industry structure, and social-political arena)	Robson (2004)
Rational and Emotional Groupings	(Bosse & Coughlan, 2016) Bosse, Phillips and Harrison (2009) Boutillier and Zdziarski (2017) Crane (2020) Elms et al. (2010)
Relationship with the organization (core, strategic and environmental)	Bourne (2009)
Bourne and Walker (2005)	
Relationship within the organization (regulator, controller, partner, passive, dependent)	Mainardes, Alves and Raposo (2011, 2012)
Inherent right (legitimate vs. derivative)	Friedman and Miles (2004)
Fassin (2012)	

METHODOLOGY

This research used qualitative inquiry to examine responses to open-ended questions from experienced project managers with stakeholder management experience. The researchers compared the results of the qualitative inquiry with practices identified in the literature to capture similarities and differences in approach to stakeholder management.

Creswell and Creswell (2018) described five approaches to qualitative inquiry: narrative research, grounded theory, ethnography, case study, and phenomenology. Phenomenology has been used more frequently in project management research than the other methods (Denney, 2020; Hlalele, 2019; Kadangwe & Emuze, 2017; Müller & Jedličková, 2020; Prakash & Ambekar, 2020; Rolfe, Segal, & Cicmil, 2017).

The research methodology consists of four parts. First, the researchers distributed open-ended questions to participants solicited through various personal contact mechanisms, including social media and email. The data was collected using two samples: 2017-2018 and 2021-2022. Respondents needed at least five years of project or program management experience. Five years was selected as in Denney (2020), consistent with guidance provided by the literature (International Project Management Association, n.d.; Project Management Institute, 2023; Wai & Rindermann, 2017).

54 individuals responded to phase 1, with 46 qualified respondents. An additional 25 individuals responded to phase 2, with 25 qualified respondents. Decomposition of the text resulted in different data points tallies for each research question: RQ1: 96, and RQ2: 61. Over 85% of the respondents identified as a government contractor, in the military, involved in information technology, construction, or manufacturing. The remaining 15% identified as healthcare, transportation, or other non-defense

government. 42% of the respondents identified as female and 58% as male. The average number of years of experience is as follows: for program managers (17 years), project management (14), other project management functions (12), and project management support (8 years).

Phenomenology principles were applied by having respondents provide written responses to five open-ended, essay-type questions about the research topic. Each respondent was asked to write approximately 500-700 words per question to enable the researchers to understand their context and perspective. The questionnaire was submitted electronically, which allowed the respondents adequate time to craft and answer instead of being pressured during a face-to-face interview (Kvale & Brinkmann, 2008). A copy of the questionnaire is shown in Table 4.

TABLE 4
RESEARCH QUESTIONNAIRE

Welcome to our Study on Stakeholder Management in Project and Program Management
Instructions: (described below)
Q1. STAKEHOLDER MANAGEMENT PLAN- What is included in the stakeholder management plans that you have written or used? If you do not have a document called a Stakeholder Management Plan, what do you do instead?
Q2. WHO are the project stakeholders? How do you group them, or don't you? Why?
Q3. Describe HOW stakeholders are identified. To what extent have you used a formalized process to identify stakeholders?
Q4. Describe WHEN the stakeholders are identified. Describe the extent to which stakeholders were identified in a proactive, continuous manner throughout the project/program lifecycle, or was identification primarily limited to a particular phase of the project/program? Why? How often do you review the list of identified stakeholders?
Q5. STAKEHOLDER PRIORITIZATION- Describe the methodology you used for prioritizing and engaging stakeholders. Include how you determine who is the best person to interact with a given stakeholder? If a particular named methodology is used, please list it, or was the methodology less formal? Describe what was done, even if it was an ad-hoc process.

Participant instructions included the following:

For these questions, the term stakeholder relationship management (or stakeholder management, for short) includes identifying, prioritizing, engaging and monitoring stakeholders.

There are no set or standard or expected answers. This is not a "check the box" or "select the best answer" exercise. The more you write and provide context, the more it will help us understand your thought process as an experienced professional and add a practical dimension to the myriad of theoretical research. We are looking for your experience--including what has worked and what hasn't related to stakeholder engagement and why you perceive it that way.... Ideally, each answer to the questions would be about 500-700 words.

In conducting this research, potential biases were taken into account. Response bias refers to the potential for respondents to provide answers they believe are socially acceptable or desirable rather than reflecting their true thoughts, beliefs, or practices (Collins, Shattell, & Thomas, 2005). The researchers mitigated the potential for response bias by emphasizing the anonymity and confidentiality of responses in communicating with participants. Additionally, the researchers considered the possibility of selection bias. The research sample consisted of experienced project managers, which may skew the findings toward the

practices of experienced project managers. Therefore, the results may not fully represent the practices of less experienced project managers or those in different roles.

The research falls in the “exempt” category per the Institutional Review Board (IRB) at the authors’ institution as defined in the provisions stated in 45 Code of Federal Regulations 46, Subpart A (Common Rule). Each respondent received a written description of the project and gave informed consent for participation in this study.

After the researchers received the responses from the participants, the researchers gathered the inputs and analyzed the text for key themes, then analyzed the responses using inductive coding (Emerson, Fretz, & Shaw, 2011). Sentences were decomposed into phrases, and phrases were grouped by topic. The findings section describes the key themes and the result of inductive coding. The discussion section compares the findings to the current literature, identifying the gaps. In the conclusions section, the researchers summarized the results and identified recommendations for further research.

FINDINGS

The research question is, what are the gaps in the characteristics of stakeholder relationship management success when comparing what is reported in the literature, practice standards, and practitioner responses? As previously described, this contains four research questions. The findings are organized along the research questions. Verbatim (in vivo) phrases are shown by quotations.

Research question 1 (RQ1): How is stakeholder management planning conducted and how is the process documented?

This question was answered using the responses to survey question 1 (What is included in the stakeholder management plans that you have written or used? If you do not have a document called a Stakeholder Management Plan, what do you do instead?) described in Table 3. A summary of the findings for RQ1 is found in Table 5.

TABLE 5
SUMMARY RQ1 (STAKEHOLDER MANAGEMENT PLAN) FINDINGS

Theme	Key Responses [in vivo in italics]; [n=91]
Formal Use of a Stakeholder Management Plan (SMP)	
Always	<i>It is best not to veer from what has been determined as the method of choice with/for that stakeholder</i>
	<i>Any successful company will develop, publish, train to, and follow a written plan.</i>
	<i>The key is to establish a repeatable process, train the stakeholder management team on its contents, hold the teams accountable for consistent application, and perform post-decision analysis of the effectiveness and needed improvement to the plan</i>
Case by case basis	<i>Used primarily when [it is a] very large pursuit... complicated [project] ...geographically dispersed.</i>
Seldom Used	<i>Not formalized</i>
	<i>Not progressed to the point in maturity where we have this artifact</i>

Theme	Key Responses [in vivo in italics]; [n=91]
SMP Content	
Detailed response	Detailed outline including project goals, methods, risks, stakeholder name, title, organization, responsible person, key points, how often, and a customer contact plan.
Simple response	<i>Short and sweet [using a] standard template.</i>
Alternatives to SMP	
Communication Plan	[SMP is] <i>just a communication plan [for] gathering data or meetings with [the stakeholders]</i>
Regularly scheduled meeting	<i>Includes topics of conversation, issues and resolution, next steps/assignments, action items, and approvals [using a] fixed agenda to keep the exchanges concise</i>
	<i>SMP is nothing more than scheduled stakeholder meetings (which are already documented) in the Integrated Master Schedule.</i>
Meeting documentation	<i>Contact plan notes including objectives of the meeting, date of the meeting, comments of the discussions and follow-up (including who else participants should talk to)</i>

Research question 2 (RQ2): Who are the project stakeholders and how are they identified?

This question was answered using the responses to survey question 2 (WHO are the project stakeholders? How do you group them, or don't you? Why?) and survey question 3 (Describe HOW stakeholders are identified. To what extent have you used a formalized process to identify stakeholders?) A summary of the findings for RQ2 is found on Table 6.

**TABLE 6
SUMMARY RQ2 (STAKEHOLDER IDENTIFICATION) FINDINGS**

Theme	Key Responses [in vivo in italics]; [n=131]
General definitions of stakeholders	<i>Anyone who could have an interest in the effort</i>
	<i>Stakeholders are the ones that contribute to the project at any stage/level</i>
	<i>All [stakeholders] are the most important in order to succeed.</i>
	<i>Stakeholder is a person or organization who can positively or negatively impact the execution/implementation of a project.</i>
	<i>All current people who can materially affect your options; They often have conflicting needs and expectations.</i>
	<i>Primarily ...stakeholders were at the tactical level of the organization ... where briefings were conducted with the executive VP to ensure a full understanding of performance.</i>
	<i>Decision makers</i>
Specific named roles	<i>Project sponsors start [here] but ultimately include many others to ensure no stakeholders are excluded.</i>
	<i>Customer of the customers.</i>
	<i>Customer bosses and internal bosses</i>
	<i>Co-contractors that the government customer contracted with</i>
	<i>Supply Chain (for subcontracts and material) [including] value-added partners</i>
	<i>Own company departments dependent upon your functional support including Finance, Contracts, IT, Strategy personnel and Business Development</i>
<i>Peers to ensure interfaces and one voice</i>	

Theme	Key Responses [in vivo in italics]; [n=131]
	<i>Service/product end users and end testers. They need to make sure all requirements of the project are part of the scope and project completed as per needs of organization</i>
	<i>Investors, Payers/ Financial Sponsors (e.g., government authorization/ funding agencies, acquisition decision makers, and commercial buyers</i>
	<i>Technical reviews of proposed services/products</i>
	<i>Political or Staff -level stakeholders that your acquisition customer does NOT want you to talk to without them.</i>
	<i>Regulatory agencies and governing boards: They have specific expectations and influence [including having a] political nature to influence.</i>
Grouping of stakeholders	<i>Grouped into internal and external due to competing priorities</i>
	<i>Very dangerous to group stakeholders as you tend to merge their needs and requirements which are typically unique.</i>
	<i>Grouped into positive neutral and negative [stakeholders]</i>
Quantity of stakeholders	<i>Who they are and how many there are depends on the project - bigger, higher value projects typically have more stakeholders.; stakeholder categories and groupings vary depending upon the nature of the market in which the company operates?</i>
	<i>I have four stakeholders. consortium (3 partners) stakeholders are brought into discussions early</i>
Tools and Methods	
General tools and methods	<i>Review organizational chart</i>
	<i>List the program team</i>
	<i>Defining Roles and Responsibilities (RACI chart) of all Stakeholders involved in coordination with client's management.</i>
	<i>Customer Decision Mapping tools</i>
	<i>Brainstorming and expert judgment</i>
	<i>Power grid</i>
	<i>Stakeholder mapping... to illustrate relationships between stakeholders or who was influencing who.</i>
	<i>Document results on a stakeholder register</i>
	<i>"Playbook" methodology that stakeholders are now used [sic] to and expected</i>
	<i>Miller-Heiman Strategic Selling Customer Meeting Plans (Green Sheets);</i>
	<i>Derivative templates taken from Shipley Associates Capture Plan Templates</i>
	<i>Value Proposition workshop</i>
Specific tools and methods	<i>1. Adapt a Customer-Centric Mindset. 2. Identify the stakeholders to key on and define the Value Delivery Chain appropriate to that customer set that is consistent with the way the customer does business and makes decisions. 3. Communicate with the customer to the greatest degree possible to understand "A Day in the Life" of the customer – what they want, what they need, what difficulties they face in meeting those needs, and what services/products you can offer that will meet those needs. 4. Define and document a Customer Value Proposition that responds to their needs with the appropriate services/products in a manner consistent with what you have learned about what they value at the price they are willing/able to pay. 5. Define a Value Delivery System detailing exactly how you will deliver the Value Proposition to the customer within the cost and schedule parameters they view as acceptable given the environment and competition. 6. Communicate the proposed Value Delivery System to the customer and when selected implement the Value Delivery System as promised.</i>

Theme	Key Responses [in vivo in italics]; [n=131]
	<i>Developed cradle-to-grave approach to customer-focused value delivery.</i>
No specific tools and methods	<i>I haven't used the methodology</i>
	<i>Not created a process to formally identify stakeholders as they are generally the same from project to project because projects are assigned by business lines.</i>
	<i>[Organization is] mature as far as process but we have not formalized the stakeholder methodology</i>

Research question 3 (RQ3): *When are stakeholders identified, and by what method?*

This question was answered using the responses to survey question 4 (Describe WHEN the stakeholders are identified. Describe the extent to which stakeholders were identified proactively and continuously throughout the project/program lifecycle, or was identification primarily limited to a particular phase of the project/program? Why? How often do you review the list of identified stakeholders?) A summary of the findings for RQ3 is found on Table 7.

TABLE 7
SUMMARY RQ3 (WHEN IDENTIFIED) FINDINGS

Theme	Key Responses [in vivo in italics]; [n=101]
When Stakeholders are Identified	
Early	<i>Earlier these stakeholders are identified in their requirements/decision processes the better, as that affords valuable time advantages to shape and position the company as the preferred supplier.</i>
	<i>Identify stakeholders beginning with the capture process.</i>
	<i>When scope is established, we find out who the real customers (stakeholders) are.</i>
	<i>Identified at the beginning of the project and remain throughout the lifecycle</i>
Continuously	<i>Done throughout/ continuously</i>
	<i>Part of the ongoing Business Rhythm</i>
	<i>At the beginning and as necessary throughout the project.</i>
Periodically	<i>The best practice was to re-look about quarterly or at a major milestone but that did not always work.</i>
	<i>IX per year update was successful.</i>
Dependent on circumstances	<i>Because change is constant, I have found that regular intervals are more effective than reviewing at stages within the project life cycle</i>
	<i>Varies by project</i>
	<i>Unless it is a very large program, ... most stakeholder management was more informal after the capture phase.</i>
	<i>Short term projects may need to be done weekly whereas a long-term project may only need to be done monthly or quarterly.</i>
At the end	<i>Measured post-mortem during lessons learned sessions</i>

Research question 4 (RQ4): *How are stakeholders prioritized and managed to achieve optimal engagement?*

This question was answered using the responses to survey question 5 (Describe the methodology you used for prioritizing and engaging stakeholders. Include how you determine the best person to interact with a given stakeholder? If a particular named methodology is used, please list it, or was the methodology less

formal? Describe what was done, even if it was an ad-hoc process.). A summary of the findings for RQ4 is found on Table 8.

TABLE 8
SUMMARY RQ4 (PRIORITIZED AND MANAGED) FINDINGS

Theme	Key Responses [in vivo in italics]; [n=46]
Mapping approach	
Formal mapping	<i>Some people were very into the "level" of the person that they would talk to.</i>
	<i>Project managers directly interact with senior level business line and department stakeholders.</i>
	<i>Equivalent people on your side - management technical and operations.</i>
	<i>Depends on expertise level of team members</i>
Informal or group mapping	<i>Establish a "working level" stakeholder group for regular engagement</i>
	<i>Pretty much self-identify - you quickly find out during a project who pulls the strings....one should always be on the lookout for new or secondary stakeholders.</i>
Prioritization approach	
Prioritization	<i>Prioritized based on the strategic and/or operating plan goals or objectives for each external stakeholder set.</i>
	<i>Based on dependency of tasks</i>

DISCUSSION

RQ1: How Is Stakeholder Management Planning Conducted and How Is the Process Documented?

Findings for this research question resulted in three themes: (1) formal use of SMP (2) SMP content, and (3) alternatives to using a SMP. Each theme was decomposed into lower-level responses because of the large amount of data received.

Theme 1: Formal Use of an SMP

Respondents provided a broad spectrum of responses as to whether they use an SMP, ranging from always required to generally not used. The results ranged from a categorical claim “ANY [emphasis added] successful company will develop, publish, train to, and follow a written plan” to a process orientation “the key is to establish a repeatable process, train the stakeholder management team on its contents, hold the teams accountable for consistent application, and perform post-decision analysis of the effectiveness and needed improvement to the plan”. The results were striking in another way since the question specifically asked about a document called a Stakeholder Management Plan, and many avoided using that term altogether.

For those who said they always, or nearly always, use an SMP, the responses were linguistically formal, almost as if reciting recent training or certification requirements. The instructions emphasized the need to include the respondents' experience instead of a standard or expected answer. This six-step process and the extensive use of jargon demonstrate an example of the formality of language. Note that jargon has been highlighted below to emphasize its use:

1. *Adapt a Customer-Centric Mindset.*
2. *Identify the stakeholders to key on and define the Value Delivery Chain appropriate to that customer set that is consistent with the way the customer does business and makes decisions.*
3. *Communicate with the customer to the greatest degree possible to understand “A Day in the Life” of the customer – what they want, what they need, what difficulties they face in meeting those needs, and what services/products you can offer that will meet those needs.*
4. *Define and document a Customer Value Proposition that responds to their needs with the appropriate services/products in a manner consistent with what you have learned about what they value at the price they are willing/able to pay.*

5. *Define a Value Delivery System detailing exactly how you will deliver the Value Proposition to the customer within the cost and schedule parameters they view as acceptable given the environment and competition.*
6. *Communicate the proposed Value Delivery System to the customer and when selected implement the Value Delivery System as promised.*

Another respondent provided similar formality, suggesting that customer value factors could “include the degree of knowledge of or presence of – a customer champion, a well-defined acquisition strategy, a knowledgeable source selection board, the customer’s buying history, a validated and understood customer requirement, and the degree of customer intimacy.” However, both elegant responses narrowly target the customer instead of the broader definition of a stakeholder as described in the introduction. Both responses lead one to question the authenticity of these responses as natural.

Those who responded that the SMP is only used on a case-by-case basis spoke from experience, providing clear explanations of situational project management. This also brings to light the potential differences in projects and programs represented by the participants ranging from small to large scale, multi-year development activities or phased programs.

Theme 2: SMP Content

For those who said they always, or nearly always, use an SMP, the responses were markedly like one another, with most focusing on stakeholder identification, including the stakeholder’s name, title/position in the organization, timing and frequency of the contact, preferred communication style, person responsible for communication and key messages.

For those who advocated the SMP on a case-by-case basis, there was wide agreement in the value of having a standardized template. From the responses, the context for SMP appeared to be more focused on stakeholder analysis instead of a process orientation as found in the PMBOK Guide (Project Management Institute, 2017).

As described in the literature review (Bourne, 2009; Cleland & Gareis, 2006), the SMP generally includes a stakeholder identification, analysis, prioritization, engagement, and monitoring process. Research also emphasized the development of a stakeholder engagement strategy as part of the SMP (Bosse, Phillips, & Harrison, 2009; Bourne, 2009; Bourne & Walker, 2005; Pirozzi, 2019; Tran, Carden, & Zhang, 2022). However, contrary to findings in this study, there was no mention of a case-by-case or situational use of the SMP, as researchers tend to identify and disseminate best practices.

Theme 3: Alternatives to SMP

Two specific findings stood out when asked about what is used instead of a SMP. First, almost one third of the respondents commented that a SMP is just a communication plan. Second, almost one third (not mutually exclusive) responded that a SMP is simply regularly scheduled meetings with the stakeholders. This approach embraced peer to peer engagement as a specific methodology. The emphasis on meetings included having a documented agenda, capturing, and distributing meeting minutes (with key points, changes from the last time, surprises, or issues, and action items).

RQ2: Who Are the Project Stakeholders and How Are They Identified?

Respondents were asked to identify the stakeholders in the research question. This resulted in four themes: (1) general definitions of stakeholders, (2) specific named roles, (3) grouping of stakeholders, (4) quantity of stakeholders, and (5) tools and methods.

Theme 1: General Definitions for Identifying Stakeholder

Respondents gave a wide range of general definitions from the broad such as “*anyone who could have an interest in the effort*” and “*positively or negatively impact ... [the] project*” to the narrower “*decision makers.*” Since so many respondents have a general definition, it is recommended that Survey Question 2 be modified to provide SPECIFIC roles of the stakeholders. Theme 1 is consistent with what is found in the literature concerning the scope and definition of stakeholders (Fassin, 2009; Friedman & Miles, 2004).

Theme 2: Specific Named Role

Most commonly, respondents grouped the stakeholders into three sets.

1. Internal stakeholders including Employees, Key Governing Board Members, Regulatory Agency Representatives, and Functional Departments
2. Service/Product Recipients including End Users, Value-added partners, Suppliers and Customer Technical Reviewers
3. Financial Supporters including Project Sponsor, Government Business Users, Buyer, Acquisition Decision Makers, and Investors

When asked to list specific roles, the responses were generally consistent with the project management literature, see Freeman (1984); Mitchell, Agle and Wood (1997); Project Management Institute (2021).

Theme 3: Categorizing Stakeholders

While the responses were sparse, the respondents provided an insight into the controversy on whether each named stakeholder should be treated as an individual or whether like-minded stakeholders should be grouped and managed in that fashion.

One of the most complete responses to the question of whether to group stakeholders or not is as follows:

... sometimes group them into Strategic, Operational and Tactical, but I think that is of limited value - that only affects what level of executive may be needed to talk to them. At the strategic market level, the stakeholders (government buyer/user, commercial buyer, or legislative authorizer/appropriator executives) were generally matched with company or consulting executives who either had a relationship with the stakeholder or were at a sufficiently high level to enable a peer-to-peer engagement. At the tactical/program level the matches were generally managed as a result of formal and required customer assessments using various tools for matching appropriate customer-executive level encounters with specific outcomes expected.

A minority of respondents stated that grouping may minimize or obfuscate the differences in stakeholder perspective. *“As you tend to merge their needs and requirements which are typically unique.”*

While the literature provides a multitude of classification categories, this research provided insufficient data to conclude how stakeholders are categorized in practice. Future research could center on the classification categories shown in Table 3.

Theme 4: Quantity of Stakeholders

As expected, the number of stakeholders depends on the size and complexity of the project. The purpose of this part of the survey question was to add to an understanding of whether the respondent broadly or narrowly defined stakeholders. Additionally, the quantity of stakeholders is not addressed in the academic literature.

Theme 5: Tools and Methods

Participants listed tools and methods ranging from none to general (such as brainstorming and expert judgment) to specific (Stakeholder Register, Customer Decision Mapping, Power grid, Stakeholder Mapping, Miller-Heiman, Shipley Associates, Value Proposition Workshop, and Value Delivery System or Chain). Of the specific tools and methods, using the stakeholder register and stakeholder mapping were the most common responses. It is noted that most participants responded in the no or general category. The other specific techniques (not including Stakeholder Register) were only listed by four participants. As in theme 1, one of the participants who responded with somewhat obscure techniques notes that tool use is *“not necessarily a single academic process but ... blending [of]... multiple methodologies.”* Table 9 shows the occurrence of methodologies listed by the respondents. Using, ProQuest there were not any references for Miller-Heiman or Shipley Associates.

TABLE 9
METHODOLOGY IN THE LITERATURE

	Scholarly Sources (Note 1)		Practitioner Sources (Note 2)
Methodology	References	Examples	References
Value Proposition	69	Bandara et al. (2021); Kadume and Naji (2021); Walker, Bourne and Shelley (2008)	4228
Stakeholder Mapping	55	Mohamed, Nguyen and Panuwatwanich (2018); Robins et al. (2022); Walker, Bourne and Shelley (2008)	263
Value Delivery System or Chain	24	Eftekhari et al. (2022); Louw et al. (2018)	347
Stakeholder Register	5	Bulmer, Prado and Carlos (2021); Fernandes and O’Sullivan (2022); Gachie (2019); Santos and Brandão (2022)	14
Power Grid	UNK*	Bourne and Walker (2004)	UNK*
Decision Mapping	1	Lai and Chen (2021)	0

NOTES:

*Difficult to distinguish power grid industry from stakeholder methodology

Note 1: ProQuest One Academic Database using scholarly peer reviewed journals

Note 2: ProQuest Central using reports, wire feeds, magazines, or other sources

RQ3: When Are Stakeholders Identified, and By What Method?

Findings for this research question resulted in a single theme answering the question of when. This theme was decomposed into five responses: early, continuously, periodically, dependent on circumstances, and at the end of the project. None of the respondents described a particular method beyond those described in the result to RQ2. The goal of this question was to understand the extent to which stakeholders were identified in a proactive, continuous manner throughout the project/program lifecycle or whether the identification was primarily limited to a particular phase of the project/program.

Most respondents stated that stakeholders are identified early in the life of the project or program. More specifically, several commented that stakeholders are identified during the capture process or prior to the formal start of the project. Several commented that it is important to identify the stakeholders as soon as the project's scope has been established.

The alternative to the beginning was continuous, albeit a minority view. Several respondents commented that after the initial set of stakeholders is identified at the start of the program, the identification process becomes much more informal. While the continuous theme was evident, it appears to be primarily limited to opportunities to reduce costs, enhance mission capabilities, and enhance the customer experience.

Only a few respondents identified how often the list of stakeholders should be reviewed. The category of periodic review only included if the respondent gave a specific numeric value (quarterly, major milestone, or one time a year). While also a minority review, a few responded that the answer depends on the circumstances (including project or program size). The lack of specificity might also be interpreted that the lists are never or seldom reviewed after the list is first established, except when project goes through a major replan.

The final response, while also a minority response, was after the project ends “*measured post-mortem during lessons learned sessions.*” The wording is particularly interesting by using the word “*measured*” implying that this organization demonstrates a concerted effort in continuous improvement consistent with the literature (Boutilier & Zdziarski, 2017; Friedman, 2007; Hartman, 2011; Hollmann et al., 2022; Honey-

Rosés et al., 2020; Jones & Felps, 2013; Kumar, Boesso, & Yao, 2017; Ninan, Mahalingam, & Clegg, 2019; Project Management Institute, 2017, 2021).

RQ4: How Are Stakeholders Prioritized and Managed to Achieve Optimal Engagement?

This question also explored whether there is a particular methodology for prioritizing and engaging stakeholders to include how one determines the best person to interact with a given stakeholder. This research question resulted in the least number of respondents of any of the questions. While the reason is unclear, it simply might be that it was the last question to an already long survey. Findings for this research question resulted in two themes: (1) mapping approach and (2) prioritization approach.

Theme 1: Mapping Approach

The majority of respondents agreed that formal mapping is important to stakeholder management success. This included level to level mapping “*equivalent people on your side,*” although it is unclear whether this was part of a documented process, or simply implemented in practice. The remaining respondents advocated an information or group mapping. The group mapping was previously discussed as part of RQ2. It is difficult to ascertain whether the formal mapping processes align directly with recommended approaches from the literature; generally, practitioners who implement stakeholder mapping use approaches that roughly correspond with those noted in the literature (Bourne, 2009; Bourne & Walker, 2005).

Theme 2: Prioritization Approach

Only a few respondents commented on whether there is a practice in identifying which stakeholders are prioritized vs. others. However, a few specifically noted the need to prioritize based on issues associated with conflict:

[There was] conflict ... between two large programs within the company, one was mature and seeking additional funding for maintaining the production of additional [product] while the other was a recently awarded [product] development and follow-on production contract. The Pentagon had decided to end production of the mature program but continue funding the developmental program. There were a large number of Congressional districts benefiting from the mature program's production efforts and fewer districts involved in the nascent development program. The dilemma was how to deal with the desires of the services (Pentagon) while not ignoring the Congressional supporters. Which side of the lobbying effort should the company take? The stakeholders were many and varied – users, program managers, Congressional legislators, workers, Pentagon leaders. The company decided to forego active lobbying for the mature program in anticipation of the future benefits from the developmental program.

CONCLUSION

This study deepens our understanding of stakeholder management practices within projects. Our research confirms that practitioners rarely use Stakeholder Management Plans (SMPs) despite their prominent place in the literature. The study emphasizes the criticality of stakeholder identification at the inception of projects, employing both formal and informal methodologies for prioritization.

Limitations of the study included the focus on project managers with a minimum of five years of professional experience within limited industries. These parameters potentially restrict the generalizability of the findings, necessitating further inquiry into practices employed by less experienced practitioners and broader contexts.

The data suggests a divergence between academic literature and practitioner utilization in stakeholder registers, mapping, and value proposition areas. Future research is warranted to explore the efficacy and

best practices of continuous stakeholder identification, particularly given current practices' observed lack of formal structure and standardization.

Based on the findings, organizations could take advantage of establishing and consistently implementing formal SMPs. Such plans should be initiated at the onset of projects and be subject to regular revisions to accommodate changes in stakeholder dynamics. Organizations that rely on ad-hoc or informal stakeholder management approaches might benefit from formalizing these practices through systematic training and standardization. Moreover, adopting structured stakeholder mapping tools and methodologies is recommended for more effective stakeholder prioritization and management.

In conclusion, the study accentuates the need for a more rigorous and standardized approach to stakeholder management. While further research is needed to fully comprehend the intricacies and variances across industries and experience levels, the imperative for formalized stakeholder management plans is unequivocal.

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