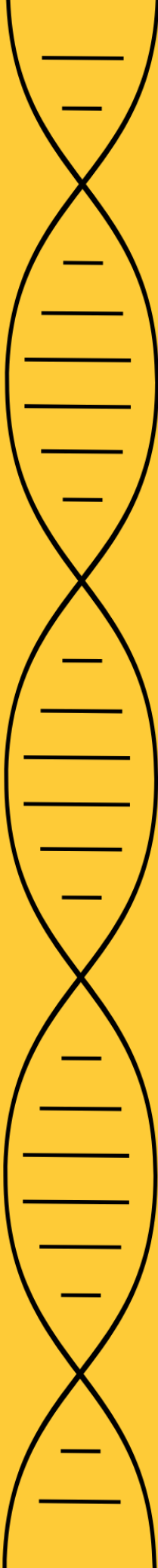
btrust

TOOL for COMMUNICATION & RECRUITMENT in stakeholder engagement



TOOL for communication and recruitment in stakeholder engagement

The succes of a stakeholder engagement process, like this co-creation programme, hinges on interacting with the right people, at the right moment, hence the stakeholder and consequences mapping.

But once you know who you want to involve, getting the right people at the table can be quite the challenge, and it is up to the right communication and recruiting tools to actually get them involved.

This is one of the points where stakeholder interactions often go wrong and result in biased outcomes and conclusions, because engaging relevant stakeholders does not imply (only) engaging the most interested stakeholders. Activating and involving stakeholders with little knowledge or interest in the case requires a well-considered communication and engagement strategy, taking into account the practical restrictions and hurdles that hinder involvement.

Key challenges in communications and recruitment

- ✖ Targeting the relevant profiles within a stakeholder group
- ✖ Being inclusive and embracing diversity while avoiding self-selection bias
- ✖ Giving the right incentives for participation
- ✖ Being transparent without priming or steering your participants
- ✖ Communicating in a neutral, objective and comprehensive manner

Key attention point

Getting the right people in your session:
Those you want ≠ those who are easy to get

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Targeting the relevant profiles

Once stakeholders are identified, it is essential to define which profiles within that stakeholder group are most relevant for involvement.

Diversity as a starting point

- ✖ For co-creation and interviews, the starting point is diversity: involve as many different types and profiles within the stakeholder group as possible to capture a broad range of viewpoints and opinions.
- ✖ It might be necessary to focus on certain profiles, when your stakeholder analysis reveals that certain

Profiles to consider within consumers:

- ✖ Age, gender and cultural diversity
- ✖ Educational background (scientific & technological literacy)
- ✖ Openness towards new innovations and technologies

Profiles to consider within academia:

- ✖ Research field and topic
- ✖ Research type (TRL level): fundamental, applied, application-oriented, …
- ✖ Decision power of the representative

Profiles to consider within industrial stakeholders:

- ✖ Size, growth rate and financial stability
- ✖ Sector and activities
- ✖ Openness towards new innovations and technologies: Innovators, early adopters, early and late majority or traditionalists (Beal, 1956*)
- ✖ Decision power of the representative

Profiles to consider within ngo's:

- ✖ Size and financial stability
- ✖ Operating field and main action themes
- ✖ Main activities: informing (the public), lobbying, negotiating, call to action, financing, …
- ✖ Decision power of the representative

*Beal, G. M. and Bohlen, J. M. (1956). The Diffusion Process. Conference Paper/Presentation, pp. 111-121.

Inclusiveness as a goal

Being inclusive is essential, but is hard to put in practice due to self-selection bias: Those who are willing and prepared to make time to engage with you in a co-creation session or an interview show a certain openness and interest towards the innovations, often associated with a certain level of knowledge.

Open calls versus targeted invitations

The self-selection bias has as a consequence that being inclusive and open in the invitations does not mean diversity and inclusivity in engagement, which translated into the advantages (pros) and disadvantages (cons) of open calls versus targeted invitations.

	Pros	Cons
Open call (untargeted)	•Unlimited input •Non-discriminating	•Large self-selection bias •Missing out on hard to reach voices
Closed invitations (targeted)	•Representation of population •Also targets hard to reach voices	•Not everyone is invited •Might be difficult to engage targeted groups

Engaging relevant profiles

Different stakeholders require different engagement and communication strategies. These should be directed towards attracting the targeted profiles, considering that the ones you need are not necessarily the ones who are easy to engage, and vice versa, that many of the volunteers that are keen to participate might not be most relevant for your purpose.

Access to the target group

To be able to gather a diverse and relevant group of participants for engagement, you need access to a sufficient amount of contacts within your stakeholder groups. For consumers, this means a large pool of consumers consumers with various backgrounds and profiles. For industry (or farmers), you need a network of representatives from the desired sectors and various company profiles.

To access these pools and networks, it is advised to involve or contract organisations that have access to these stakeholder groups, and are recognized as reliable contact point.

Creating incentives

Your audience needs incentives to be willing to invest time and energy in giving you feedback. Incentives will be different in the recruitment of consumers as for those operating in a professional environment. Good incentives for engagement are:

- ✖ Receiving interesting information (both for consumers and professionals)
- ✖ Food and drinks (especially for consumers)
- ✖ Networking opportunities (mostly for professionals)
- ✖ A fun and inspiring experience (both for consumers and professionals)

Choose timing in function of your participants

- ✖ Citizens/consumers are available outside of working hours (e.g. evenings and weekends)
- ✖ Employees are available during working hours
- ✖ Self-employed and C-level participants are more available in the evenings than during working hours
- ✖ Also take into account low-availability periods like holidays, harvest time for farmers, important conferences on the same day for industry etc…

Choose a location that is near your intended participants

- ✖ Professionals can also be gathered online if necessary, as it broadens geographical target
- ✖ Take into account possibilities for public transport, accessibility by car and parking options

Engaging relevant profiles

Profiling

To assure your participant group is diverse enough, there is some profiling needed. Most profiling characteristics, as those stated under 'targeting the right profile', such as age, professional background, company size and activities are easy and can be asked directly. However, characteristics like 'openness towards new innovations and technologies' or assessing the level of background knowledge on your technology needs to be assessed using proxies or via other indicators.

For example, for the consumer sessions in B-Trust, the levels of background knowledge was assessed based on educational background and profession, while their interest in sustainability, health and quality was assessed using their 'priorities in buying behaviour. Their 'openness towards (food related) new innovations and technologies' was assessed using two proxies in their eating behaviour.

Priorities in buying behaviour	**Eating habits**	
• Above all, my food must be qualitative and tasty • Above all, my food must be healthy • My food must be produced sustainably • My food must preferably be produced locally • My food must not be too expensive	• I am a very adventurous eater • I am open to new tastes, as long as it seems appealing • I tend to eat more traditionally	• Daily (or almost daily) meat eater • Flexitarian (including pescatarian; deliberately eats no meat several days a week) • Vegetarian • Vegan

Ensuring a balanced and diverse participant profile

To ensure a balanced and diverse participant profile, it is often necessary to adjust your recruitment strategy. For example:

- ✖ When you need to include sufficient daily meat eaters in a session on meat alternatives (which is more likely to attract vegetarians and flexitarians)
- ✖ When you need user / civilian viewpoints on a complex and technical topic (which is more likely to attract mainly scientific and technical profiles with above-average knowledge on the topic).
- ✖ When you need both organic and regular farmers in a session on biotechnology (which can be difficult as organic farming practices do not allow the use of certain types of biotechnology)

There are different ways of reaching and engaging the intended profiles and having a balanced participant group:

- ✖ **Targeted / stepwise invitations**: When enough profiling information is already available, invites can be sent out to the hardest to reach profiles first, ensuring sufficient presence of said hard-to-reach profiles
- ✖ **Recruitment stops on sufficiently covered profiles**: When additional profiling is needed during recruitment, you may need to adjust during recruitment using recruitment stops (e.g. 'session is full') on overrepresented profiles
- ✖ **Clear communication**: State in your invitation which profiles you seek, especially those you need but may be reluctant to participate.

Neutral & comprehensive communication

Communicating with affected stakeholders in the explore phase

Engaging stakeholders that are outside your field of expertise, that may also be very skeptical about your innovation requires neutral, objective, transparent and comprehensive communication, in the invitations as well as during the session. It may also not steer (prime) their answers in a certain direction, as you need their intuitive reactions and unbiased answers.

Attention point: Priming

People are easily primed and nudged to think in a certain direction, while you want to know their reactions based on what they knew or heard before, and not based on the information you gave in the invitation. This means that you have to balance information you give beforehand between triggering enough to want to attend the session and being sufficiently transparent, while not giving them to opportunity to research the subject and skewing their opinions.

Setting up the invitations

Take into account the effect of your communication source:

Communication should be sent out from a neutral party or an organisation that is seen as trustworthy by the stakeholder, and not from an institution that is actively involved in the development or implementation of this new technology as this may create resistance or prejudice hindering open dialogue. It is also better to keep 'representatives' of the technology out of the discussion, like industry representatives or even involved researchers.

Focus on the challenge and the context in the invitation, not 'your' solution

To avoid priming the participants into forming rationalised opinions or researching the subject in advance, invitations should be kept general, explaining the context rather than naming the technology or case under research, especially when inviting citizens. You want to know what they see as solutions as well, and proposing the solution under research before the session could narrow down their vision in advance. Communicate thus on finding solutions for the challenges, rather than naming your potential solution.

For stakeholders in a more professional environment, who may be more directly confronted with your innovation or technology, communication can be more explicit to assure the session answers to their expectations. Depending on the case, it can be better to name the technology under research, especially when it is a topic often discussed in the stakeholder group.

Neutral & comprehensive communication

Communication during the sessions

During the session, sufficient attention should be given to:

- ✖ Framing the reason and goal of the interaction
  Especially when invitations were not explicit, it is important to start the session transparently, including explaining the reason why the invitations were kept general (to avoid pre-research on the subject).
  It needs to be very clear for the participants:
  - Why they are there, why you invited *them*
  - What their mission is, what they are expected to do
  - What the framework of your research as, and what happens with their input
- ✖ Explaining the case
  All communications (including in the invitations) should be kept in plain language, in words that your audience can understand. Your audience is likely not familiar with your innovation, and perhaps not even familiar with science and technology. Adjust your communication accordingly, taking into account the time frame of the session

Attention point: Managing expectations

Be very clear towards the participants what their role in your project or innovation trajectory is, and what will happen with their input. Be clear about what is and what is not included in the realm of possibilities

On a note: It should be clear that the input will be taken into account as much as possible, and provide feedback to the participants how their concerns are being addressed afterwards, or provide valid arguments when they were not.

Tips for comprehensive communication

- ✖ Collaborate with experts in communication, or have your technical explanations checked by a layman to ensure comprehensiveness
- ✖ Use plenty of visuals, analogies to better-known cases, and examples to make your point
- ✖ Invest sufficient time to explain technicalities, but don't overload on details and minor nuances, they only lead to confusion and overwhelm

Communication after the interactions

Communication does not stop once the interaction has ended. Remember to:

- ✖ Inform them about the next steps (what will happen with their input) and ask for feedback on the session
- ✖ Provide feedback to the participants once their input has been included in an action plan, a process or regulations.

Neutral & comprehensive communication

Communicating with stakeholders in the co-design phase

In the co-design phase, you want your stakeholders to actively work on solutions with you. In this phase, stakeholders are often (but not always) more technically grounded, and preparation for the session is encouraged, resulting in some differences in communication

Attention point: Confidentiality

Sharing information on your innovation, and on the results of the explore phase may become a hurdle in open, clear and transparent communication. Therefore is is advised to focus on common challenges and setting up a trajectory together with competitors facing the same challenge, keeping it on a more general level. When common hurdles are eliminated, and company-specific challenges are on the table, focus on selecting experts and making agreements on confidentiality.

Setting up the invitations

- ✖ Provide ample information on the context for their participation, the reason why they were selected and what their role in the project / innovation trajectory is
- ✖ Provide clear incentives for participation (information sharing, networking opportunities, contribution to solving challenges)
- ✖ Provide additional information that can help them to better understand the case and the challenges, and prepare for the interaction, such as the results from the explore phase.

Communication during the interactions

- ✖ Explain the context and the case thoroughly during the interaction. Adjust to the knowledge level of the participants
- ✖ Give special attention to expectation management

Attention point: Managing expectations

Be very clear towards the participants what their role in your project or innovation trajectory is, and what will happen with their input. Be clear about what is and what is not included in the realm of possibilities

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- ✖ Provide feedback to the participants once their input has been included in an action plan, a process or regulations. If important concerns could not be addressed, explain the rationale behind this decision

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