



# How to Train Your Sponsor

*The 8 Keys to a Winning Relationship*

Workbook

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# How to Train Your Sponsor

## *The 8 Keys to a Winning Relationship*

*“The number one factor in determining success or failure of a change initiative is sponsor engagement.”*

*Prosci® Change Management Methodology*

Additionally, Project Management Institute (PMI) funded research reported in the Pulse of the Profession® In-Depth Report: *“Executive Sponsor Engagement—Top Driver of Project and Program Success”* shows that having actively engaged executive sponsors is the top driver of project success. While the right communication matters A LOT, don’t forget that all the communication in the world could fall on deaf ears, if your sponsor isn’t backing you up. The engaged sponsor tells everyone that this initiative matters...and they are willing to remove barriers to prove it. So, that is something you must get right if you are to successfully drive your change.

But, what if your sponsor, isn’t engaged because they don’t know what it means to be a sponsor or what they should do to support you and the project?

### **What are we covering today?**

In the accompanying training, we are going to look at the most common warning signs and critical mistakes resulting from the lack of sponsor engagement, how to fix it, and how to gently teach your sponsor to be an effective, engaged sponsor.



## How to Train Your Sponsor

*The 8 Keys to a Winning Relationship*

By employing the 8 keys to a winning relationship with your sponsor, you will leverage techniques that help them learn by doing. Leverage this workbook to help you get the most out of your relationship with your sponsor and position them, you and the project for high-IMPACT success!

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## INTRODUCTION: Warning signs & critical mistakes

### Sound familiar?

- Engagement ended after charter
- “What? Your sponsors read the charter?”
- They are just check writers
- They are too busy to help you
- They don’t seem to care
- They aren’t helping when you are stuck
- Waivered in support
- Delegated the role of sponsor to others
- Didn’t engage in the project
- Failed to build a coalition of support with leadership
- Avoided direct communication to stakeholders

### Why is this so hard?!

- Sponsor overextended
- Not clear on the role – don’t know what they don’t know!
- Project models are shifting
- Value proposition isn’t clear to them
- They have no executive support themselves
- Too many sponsors to answer to

### Highlight the most important takeaways:

*Notes:*



Step 1: **ASSESS THEM:** so you know what you are dealing with  
*The better you know them, the easier it will be to build a winning relationship.*

**Important Learning Points in This Lesson:**

Use tools and templates to determine assess sponsor engagement, experience, etc., develop action plan, and discuss as appropriate with your sponsor:

- Are they sponsors?
- Have they done this before?
- Do they understand the role?
- Can they clearly explain the change (and benefits)?
- Do they have the capacity to stay engaged?
- What can you learn from them?
- How do they digest information?

**Assessment Action Planning Checklist:**

- PM: complete sponsor assessment(s)
- PM: develop sponsor training action plan
- Joint: discuss as appropriate

**Assessment Tools & Templates:**

- [Sponsor Assessment Worksheet \(WORD\)](#)
- [Sponsor Assessment Scorecard \(EXCEL\)](#)
- [Sponsor Engagement Matrix \(PDF\)](#)
- [Sponsor To Do Checklist \(WORD\)](#)
- [Sponsor Expectations Checklist \(WORD\)](#)

**Highlight the most important takeaways:**

Notes:



Step 2. **DEFINE THEIR WIIFM:** so you know how to engage  
*Understand their motivations and goals so you can figure out how to frame every discussion in terms that will pique their interest.*

\*"WIIFM" = "What's In It For Me"

**Important Learning Points in This Lesson:**

- How do they win (or lose)?
- Be sure to look at both sides - does your "sponsor" have more to gain from this project failing than succeeding?
- Understand how they could benefit, what motivates them?
- Tie project success to personal objectives
- Understand their professional objectives – are they looking for their next move? Are they just trying not to get noticed?
- Make it your JOB to get to know them. You should sit down with them and invest time in getting to know them.

**WIIFM Action Planning Checklist:**

- PM: define WIIFM(s)
- PM: develop action plan/approach, communication strategy

**Highlight the most important takeaways:**

*Notes:*



Step 3. **SET EXPECTATIONS:** so you are speaking the same language  
*They need you to help them help you - be their partner, their "Strategy Navigator!"*

**Important Learning Points in this Lesson:**

- Tell them what you need and where you need them
- Explaining their role in terms of a company standard:
  - o Build coalitions and manage change
  - o Communication
  - o Visible Engagement
- Tell them what YOU will do
- Agree to level of authority for decisions and escalation
- Lay out your plan for communications, meetings, etc.
- Show them the project life-cycle and when and how they can engage throughout.

**Expectations Action Planning Checklist:**

- Sponsor role: build coalitions and manage change
- Sponsor role: communications
- Sponsor role: visible engagement
- PM: sponsor role/place in project lifecycle
- Joint: plan for meetings, communications
- Joint: collaborative commitments

**Expectations Tool: [Sponsor Expectations Checklist Template \(WORD\)](#)**

**Highlight the most important takeaways:**

*Notes:*



Step 4. **GAIN COMMITMENT:** so you can count on each other  
*Set a tone of accountability for everyone!*

**Important Learning Points in this Lesson:**

- Learn the importance of having all members and stakeholders reiterate expectations and confirming their agreement
- Confirm capacity to participate
- Pay attention to words AND actions
- Write it down - use these critical tools to document expectations, roles and agreement
  - o Charter – even PMOs need them!
  - o RACI
  - o Roles and responsibilities

**Commitment Action Planning Checklist:**

- Joint: review Sponsor Checklist
- Sponsor: build management support
- Sponsor: acquire resources for change team
- Sponsor: create awareness among employees and other stakeholders

**Commitment Tools:**

- [Project Charter \(WORD\)](#)
- [Project Charter \(NO Instructions\) \(WORD\)](#)
- [RACI Chart \(EXCEL\)](#)
- [Stakeholder Roles and Responsibilities \(WORD\)](#)
- [Sponsor To Do Checklist \(WORD\)](#)

**Highlight the most important takeaways:**

*Notes:*





## Step 5. **ENGAGE THEM:** throughout the change process

*Your ability to engage your sponsor in your PMO or change effort will determine your success.*

### Important Learning Points in this Lesson:

- Schedule regular 1:1s - **REGULAR CONTACT & FOCUSED COMMUNICATION**
- FOCUS** on actions / decisions - Don't wait for emergencies
- Bring **THEIR** WIIFM into **EVERY** conversation
- INCLUDE** them in problem solving and direction setting
- They are your partner and advocate - **MAKE IT EASY FOR THEM TO ENGAGE**
- Ask how you can help them
- Updates are **BRIEF**: issues summarized & impacts **SUCCINT**, solutions **RECOMMENDED**, assistance **DEFINED**, questions/input **REQUESTED**
- Their time is not wasted

### Engagement Action Planning Checklist:

- PM: concise reporting
- PM: regular/brief, concise meetings with sponsor

### Highlight the most important takeaways:

*Notes:*



## Step 6. **NOT TOO MUCH:** or you will lose them

*Tell them what they need to know to make educated and informed decisions and then...STOP!!*

### Important Learning Points in this Lesson:

- Respect their time
  - Use cc carefully
  - Keep it short, clear, focused
  - Don't invite to every meeting
  - Don't burden them with unnecessary details
  - Think Goldilocks reporting: "just right"
  - Use their language - so it feels **familiar**
- Not just information - what does it **MEAN**?
- Is it over-exuberance/over-engagement or micromanagement/lack of trust?
  - Show them how they can be most helpful - re-direct that energy where you need it most
  - Be patient and keep working on proving "you've got this"

### Not Too Much Engagement Action Planning Checklist:

- PM: concise status reporting
- PM: concise, effective sponsor engagement – meetings, communications, etc.

### Highlight the most important takeaways:

*Notes:*



## Step 7. **LEVERAGE POWER:** for good, not evil

*Their position and authority can be a powerful asset when used **correctly!***

### Important Learning Points in this Lesson:

- Be responsible** with the power
- Never use "Sponsor said" - you **give away** your power, and **release them** from their accountability commitment
- Tie back to goals and impact of your PMO or portfolio, not the person - the goals and values to be realized are not for the sponsor or any other person
- Leverage** the sponsor's relationships to assist the initiative
- Remember the power of what you are doing to **assist the Sponsor's WIIFM**

### Leverage Action Planning Checklist:

- PM: develop map goals/impacts to PMO/portfolio
- PM: develop leverage strategy

### Highlight the most important takeaways:

*Notes:*



Step 8. **PERFORM:** consistently

*Your sponsor will love you if you always make them look like a rock star!*

**Important Learning Points in this Lesson:**

- Keep your commitments
- Emulate behaviors you want
- Never blindside them
- Prepare them to represent you well in meetings
- Bring solutions, not problems
- Get the results!
- Make them look good
- Be likeable!

**Perform Action Planning Checklist:**

- PM: track/fulfill commitments
- PM: ensure sponsor prepared

**Highlight the most important takeaways:**



Congratulations on putting yourself first by using this **How to Train Your Sponsor** workbook. To access more resources and continue to accelerate your career, make sure to take full advantage of all the tools, templates, and trainings available when you need them inside the IMPACT Inner Circle. [Click here](#) to login to your dashboard.

Warmly,

A handwritten signature in black ink that reads "Laura Barnard".

PMO Strategies  
Founder & CEO, Lead IMPACT Driver,  
IMPACT by Laura

