Smart Skills™:
Influencing With Integrity

www.glowan.com
Info@glowan.com
626/914-1545
Influence Defined

*The act or power of producing an effect*
without apparent exertion of force or direct exercise of command.

*The power or capacity*
of causing an effect in indirect or intangible ways.

- Webster’s Collegiate Dictionary
"Nobody has the formal authority to achieve what is necessary, not even with those who report to them.

It is an illusion that once upon a time managers could make their direct reports do whatever was needed.

Nobody has ever had enough authority — they never have and never will. Organizational life is too complicated for that.

Yet, it is possible to have enough influence to make things happen."

- Excerpt from "Influence Without Authority" by Allan Cohen & David Bradford
What is Influencing?

Influencing is about getting people throughout an organization to collaborate on various projects and initiatives; in some cases, even when they cannot see the direct benefit to their own organization.

**Influencing is about aligning resources to enable successful outcomes** for the PMO and Oracle. Sometimes it is aligning power, sometimes it’s money while in other situations it is people, facilities and/or equipment.

*In many ways, influencing is getting people to do what they had not directly intended to do.* Influencing can be viewed as manipulation and perhaps it is. The ethical & moral test is:

*Am I influencing this individual in the best interest of the project, initiative & organization?*

Influencing requires you to get others to:
- Commit Actively
- Commit Publicly
- Commit Voluntarily
Commit Actively

When thinking about Influencing, consider the action from a strategic perspective

*Influencing* is not just a situational activity but rather part of an active strategy to build relationships, credibility and reputation.

*In Project Management,* it is common to work for and with many of the same people repeatedly, over a period of time. The building of relationships is critical to the ability to influence, now and in the future.

*When influencing for a specific situation,* make your point frequently. Use different words, metaphors and related success stories. For different types of learners, employ data, drawings, cartoons and testimonials.

*Use ‘story telling’* to convince people and build a core group of supporters.
Commit Publicly

When agreements are made with others (to go in a particular direction, support an initiative, or provide resources, etc.) it is vital to have their commitment announced publicly.

For your efforts to pay off, others must know and honor the commitment, as well as recognize the collaboration and the power that it represents.

Publicly announcing a major commitment also paves the way for others to follow.

Use an appropriate manner to socialize the information. There are a host of methods and technologies available to us so use the one that puts your Partner in the best possible position.
Commit Voluntarily

The essence of Influencing is getting others to volunteer to support your efforts

*When you win someone over,* they must feel that they have not been manipulated or coerced into a position but rather helped to see the wisdom of participating.

*This is an area where WIIFM* really comes into play. People who have been openly manipulated frequently change their minds later, and you can be left with no support and a damaged relationship.

*(WIIFM = What’s In It For Me)*
Situations exist in everyday business where "formal" influencing is called for

We all ‘manage’ resources (Partners, Colleagues, Stakeholders, our Managers) who report to someone else.

*Sometimes the influencing can and should be planned, while in other situations it is more ‘in the moment’*. Typically, however, when planning a project, your list of key decisions makers and key influencers should represent your roadmap to influence formally.

*What is meant by ‘formally’ is that we know, in advance* that these are people that we need on our side to guarantee a successful project. The other people that appear during project implementation will be considered in the ‘Informal Influencing’ section.
For the people who are obvious from the beginning

We need to plan on how, when, where and how often we will approach them to build (or reinforce) our relationship and exert appropriate influence over them.

*Be strategic about who, when and why you influence people.*

What are your intentions and what is the desired outcome? Doing so will go a long way toward keeping your relationships going with fewer confrontations, and aggravations.
Scenario One

As with any initiative or project comprised of a group of people, individuals are bound to run across a team member or two who are a challenge to work with and manage.

In a high visibility situation where you have the lead, planning is almost complete and you’ve stepped onto the critical path. Things are looking pretty good overall. Deliverables are being achieved and the whole team seems to be coming together. Everyone, that is, except for ‘that one guy’.

We all know ‘that guy’. The one that didn’t pay attention in the beginning, and has not kept himself informed about what’s happening. The guy that’s always 5 minutes late to the calls. The guy that always says, oh sorry. I was on mute, but you just know he was multi-tasking and wasn’t paying attention until he heard his name.

The guy that you’ve sent a copy of the documentation to three times already but swears he’s never seen them. The guy whose manager assures you is the expert, but can’t seem to deliver on any of his action items without a fuss and 15 minutes of recap. Yes, that guy!

In the above situation, consider the most effective and feasible way to influence the individual.
Scenario 1 - Things to consider

Things to consider:

- Develop and use a checklist by senior executive noting their "hot buttons" and how best to deal with them.
- Because this is such a high visibility, high project, hold a 'dry run' meeting with your team and management before presenting to the executives.
- As much as possible, socialize the important points of the project with the executives so they have a good concept of the impact of the project and what the consequences of not delivering would be. Consider using your senior management to assist in this work.
- Find out who has had the most successful outcomes at this level and seek their coaching and advice. Consider using them in your presentation team.

A well-written proposal will answer all critical business questions and help ensure a quick approval cycle and thus keep your project or initiative on track.

A poorly written proposal could be questioned many times requiring the requester to resubmit which could add days or weeks to the approval cycle.

Even for smaller projects, the story that your proposal tells is equally important because without funding you don't have a project.

In short, if the proposal does not say what you want, why you need it (or what problem you are trying to solve) and how it will benefit your organization in plain language, you cannot expect management to understand your request. If management does not understand the needs of your business situation and your customer, why should they approve your request for funds?

Telling the right story in the right manner is key.

The proposal is one way we influence management to approve funds for projects or initiatives by leveraging facts as we tell them the story of our situation.
Influencing and Relationship Building

Ask yourself how are you doing at strategic, intentional relationship building for the purpose of influencing.

- Am I in the place I want to be?
- What can I offer and what rewards do I get in return?
- Am I setting aside time for relationship building?
- What can I do tomorrow?

Possible Action Steps:

- Increase something you are already doing well
- Shape the way others see you by changing your behavior
- Transform yourself and your team
- Change the way your Partners & Stakeholders take advantage of your capabilities
Influencing Self Assessment

Here’s a simple self-assessment that can be used to get a snapshot of your ability and skills in the influencing area. Rate yourself in terms of whether you do these things:

- When things get emotional, I have to disengage.
- When people are forceful with me, I agree with things I usually wouldn’t.
- When dealing with people, I get frustrated when they don’t listen to and heed my advice.
- If I avoid uncomfortable situations, others will work it out on their own.
- I don’t understand why people have to get emotional. I wonder why they just don’t do their job.
- I don’t get paid to be sensitive to people’s feelings.
- I usually lose in negotiations. I tend to give up on what I really want.
- I respond to people ‘like for like’. If they get angry with me, I get angry back.
- I’m not paid to be a mediator; I’m paid to get projects done.
- When people do things for me (whether or not I have asked for it), I feel obligated to reciprocate.

Rate Yourself:

1 - Never
2 - Rarely
3 - Frequently
4 - Almost always

Scoring Guidance:

30 to 40 - Need immediate help with influencing and negotiation skills
26 to 33 - Fair level of skills in influencing
17 to 25 - Good level of skills in influencing
10 to 16 - Excellent level of influencing skills
Influencing Styles

Intimidators push and shove others into making decisions. This is not influencing but bullying. Frequently this is accomplished by "position power" and seldom results in actual support but does accomplish compliance.

Bad influencers may work hard to accomplish their goals but lack the skills to engage others, rally support and create an appropriate work environment.

Unskilled influencers frequently exhibit the "do as I say, not as I do" behavior which shows the cracks in their integrity and damages their reputation.

Effective influencers get people to focus on an issue that is clearly stated and unemotionally represented. This calm demeanor helps others to manage their own emotions and avoids many confrontations.

Effective influencers walk their talk, allowing prudent risk taking and they communicate regularly. This consistency builds trust and a certain level of loyalty in the people with which they are working.
Here are some simple guidelines for influencing effectively:

*Influence with the right intentions.* Influencing with integrity assumes that the influencer is interested in a successful outcome.

*Seek and state outcomes or results.* Paint the picture of what it will be like when successfully completed.

*Connect your outcome with the WIIFM* for the person you are influencing.

*Reiterate the other person's concerns* and address them effectively.

*Recognize and verbalize* commonly shared values and beliefs.

*Be consistent* in approach and delivery.
Due to our 24x7x365 global ‘virtual’ work environment, opportunities to exert our influence don’t always present themselves when we are actually fact-to-face with others.

Again, think strategically about the venues that are available to you and the advantages and liabilities presented by both.
In the Scenario below, a global project has hit a snag as the Partner in China holds unrealistic expectations of how long a project will take and feels as if he has been put in an awkward position.

You are reviewing the draft schedule with them for the first time and you can hear the anxiety in his voice. He is focused only on the total length of time needed, not the significant number of steps involved. With a voice full of angst and frustration he asks, Why is this taking so long? I don’t understand. Two years ago it took us a week to set up everything. We never had to get approvals. We just did it. Why will it take 4 months now? I submitted this request 2 weeks ago. I thought we’d be done by the end of this month. I told my VP we’d be done in about 3 weeks. Now what am I going to tell them? We’ve got to do better. I can’t wait that long.
Scenario 2 - Things to consider

Things to consider:

What can you do in the moment to calm your colleague? What informal influencing techniques could potentially work given what you know about the individual, their culture and the realities of the situation?

What follow-up actions must you take to ensure a positive relationship and a successful outcome?

*Influencing is a critical skill that must be mastered simply because we work with a multitude of people. Often times, the people that we work with may have different goals and agendas and in order to establish meaningful win-win outcomes, you must know how to influence without power or authority.*
When working globally, it is imperative to develop a working understanding of the various cultures with which you are dealing. Different cultures react differently to the exact same data and approach to delivery.

In some cultures, the context in which a project is being executed is equally as important as the actual content (or technical work) being performed. By context, we mean the culture's orientation to space, time, relationships, control, and communication behaviors.

These cultural subtleties often make the difference between a success and an unsuccessful project.
High and Low Context Cultures

HIGH
Japan
China
Korea
Indonesia
India
Arabic
Greek
Spain
Latin America
Italy

LOW
United Kingdom
France
United States
Canada
Denmark
Sweden
Norway
Finland
Germany
Cultural Difference: Decision Making

There are two main differences between high-context and low-context cultures.

- **Decision making**
- **Relationship factors**

**Decision Making**

*High-context cultures tend to defer to the most senior person* in the hierarchy for decisions even when they may not be the most knowledgeable. Additionally, they are responsible for the actions of the subordinates.

*In low-context cultures, decision making tends to be carried out much lower in the organization* and while hierarchical accountability exists, individuals are usually accountable for their own decisions, not the decisions of their superiors.
There are two main differences between high-context and low-context cultures.

- Decision making
- Relationship factors

The second major difference deals with relationship factors and the amount of ambiguity in communications. In high-context cultures such as Japan or China, more importance is given to the relationship and the spoken word while in low-context cultures, more weight is placed on formal written agreements.

**HIGH CONTEXT**
- Greater importance for ambiguity
- More emphasis on non-verbal communication
- Responsibility based on agreement not on contract
- Implicit control
- Group orientation
- Relative Values
- Feelings and Emotions
- Holistic Concern

**LOW CONTEXT**
- Greater need for precision
- More emphasis on verbal communication
- Responsibility based on a contract
- Explicit control
- Individual orientation
- Absolute Values
- Logic
- Segmented Concern
Informal Influence

Informal leadership refers to that form of influencing accomplished through normal relationship building. It is an activity shared by individuals, teams and organizations and is occurring continuously.

Informal Influencing is a dynamic, shared process with the objective of furthering the cause or vision of the department, organization or company. The key is that influencing occurs upward, downward and sidewise in every organization.

Managers influence their direct reports and the opposite is true as well. Individual contributors influence executives by their presence, work ethic, and quality and quantity of the work they perform.
Every Day Influence

People throughout an organization influence each other every day

In many ways, the ability to influence informally represents the culture of the organization. The questions below represent some of the testing you can do to determine the openness of your organization to Informal Influencing.

- Are great ideas implemented and celebrated regardless of where they came from?
- Do senior people give credit to those lower in the organization when they generate good ideas and have the skills and tenacity to get them implemented?
- Do individual contributors recognize the contribution of management and celebrate the overall success of the organization?

If most of your answers are Yes, you reside in an organization where Informal Influencing is likely a major component of the culture.
Modeling Positive Behaviors

The most powerful way to influence others

The most powerful way to influence others is by modeling the kind of behavior that is represented by both your personal brand and the brand of your organization.

By walking your talk, everyone around you (colleagues, partners, suppliers, stakeholders) is challenged to learn, and no one needs to stand by in a dependent capacity.

In this environment people willingly seek feedback, openly discuss errors, experiment optimistically with new behaviors, reflect mutually on their operating assumptions and demonstrate support for one another.
Listening

Seek first to understand then to be understood
This requires talking less and listening a lot more

Differentiate between Logic and Emotions. The later is far more motivational and powerful. When someone is in an emotional state, no amount of logic is going to sway them.

Listen primarily with your eyes and heart and secondarily with your ears. Listen with your entire body. Even in a virtual environment we have a sense of when people are engaged or not. If our Emotional Intelligence is high, we also can easily determine our own level of presence and engagement.

Ask questions and do not interrupt. The best way to determine someone's position is to ask open-ended questions. Have them describe what success looks like to them in a given situation and listen carefully for the "clues" to winning them over.

Show that you care, don’t let your ego get in the way. Remember, in Influencing with Integrity, it is about what's right, not who's right.
Connect with People

Find their agenda first
When in the company of others (in meetings, on calls or in impromptu gatherings) upon whom you wish to exert influence, determine what is important to them first and talk about that first. Listen & learn.

What’s their passion in life?
What generates their enthusiasm? How does that translate to the work environment? Listen & learn.

What hurts them?
Where have they been disappointed before? In what areas might they feel vulnerable? Listen & learn.

What is their hope?
What will they like to become? What does personal success look like to them? Listen & learn.

Until you have genuinely connected with people it is unwise to attempt to influence them.

You need to be ‘in relationship’ with them to have earned the right to exercise influence over them.
Scenario Three
Influencing Without Authority

Tips for Influencing Without Authority

Tip 1. Know What You Want

- **State your observations.** These are the facts and things that can be seen and heard. Observations are different from opinions. Facts are objective and cannot be argued.

- **State your thoughts and feelings about the situation.** Be sure to start each of these statements with the word “I” so that it’s clear that these are your opinions.

- **State what you want the other person to do.** If you truly want the door to be open to alternative solutions, make statements about your needs rather than presenting solutions up front. If you state the solution too early, it might close the door on other possible alternatives.

- **Be Proactive and Build a Power Base** – Build a foundation for influence before you need it. Having a good power base of relationships with others will make influencing a much easier task.

Be proactive and do not wait until you need something to start showing an interest in what others are doing. Build all around positive relationships both vertically and horizontally. This means that you establish rapport and build relationships with everyone from the receptionist to people at higher levels within the organization or community.

*Most importantly, act with integrity and work to earn the trust of your colleagues.*
4

Tips for Influencing Without Authority

Tip 2. Inspire Cooperation

*Inspire Cooperation to Overcome Resistance* – Do your research so that you can anticipate reactions be prepared to address them. If you know in advance how people are likely to feel about your project, you will be better prepared to deal with their reactions or resistance.

A few things that you must do are to determine whose support you absolutely need to have and speak with others to clearly understand what you need to do to get their buy-in.

Tip 3. Agreeable Exchange

*Go in to Win with an Agreeable Exchange* – Ensure that your position addresses the needs of others. Research, research, research is key here.

If you go in with the goal of creating a win/win outcome, getting the buy-in or mindshare of others will be much easier. Be sure to think of everyone that your project will affect not just the key stakeholder.

Consider their concerns and how you might address them in your dialog. Offer something of value in exchange. It’s a give and take world and knowing this up front will increase your overall chances of success.
**Tip 4. Continued Skill Building**

*Keep building on these skills* – Now that you’ve had experience with using this process to win someone over, continue building on your expertise.

Look for small projects where you can use your influencing skills and create more wins for yourself.

This will get you prepared for the grateful day that the “BIG” project shows up.

You’ll now be equipped with the skill, knowledge and confidence that you need to tackle it with ease.
Self Assessment & Action Steps

Think about your own career, and the position that you currently hold. Now really dig deep, be honest, and ask yourself the following questions:

I place a premium on being able to positively influence others.
___ Yes ___ No

I thoroughly do my research before any meeting where I am trying to gain the mindshare of others.
___ Yes ___ No

I work hard to build alliances throughout the organization so that I will have the support that I need before I actually need it.
___ Yes ___ No

I proactively seek feedback vertically and horizontally throughout the organization on any and all influencing initiatives. When I receive feedback, I take what’s useful and relevant, and put a plan into place to work it.
___ Yes ___ No

I have a mentor or professional coach to assist me, and give me guidance and feedback.
___ Yes ___ No

I am fully accountable for my level of success. I own it, take action and celebrate when I win.
___ Yes ___ No

For every Yes, please write specifically what you are currently doing that makes it effective. Now look for opportunities to build upon these engagements to help continue to grow and develop. What will you do next?

For every No, please write one thing that you will do to implement this into your career development strategy. Be very specific and give yourself a deadline to get it done. Once you have it done, be sure to celebrate your success.

Finally, think about how conscious you are about both Formal and Informal Influencing with Integrity, and choose one or two individuals (or groups) where you would like to have more influence. Build a plan for specifically what you are going to do to improve with these people. On the next page is a simple template for building your plan.
## Influence with Integrity Planner

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<th>Where Do I Want to Be</th>
<th>Actions to Take</th>
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