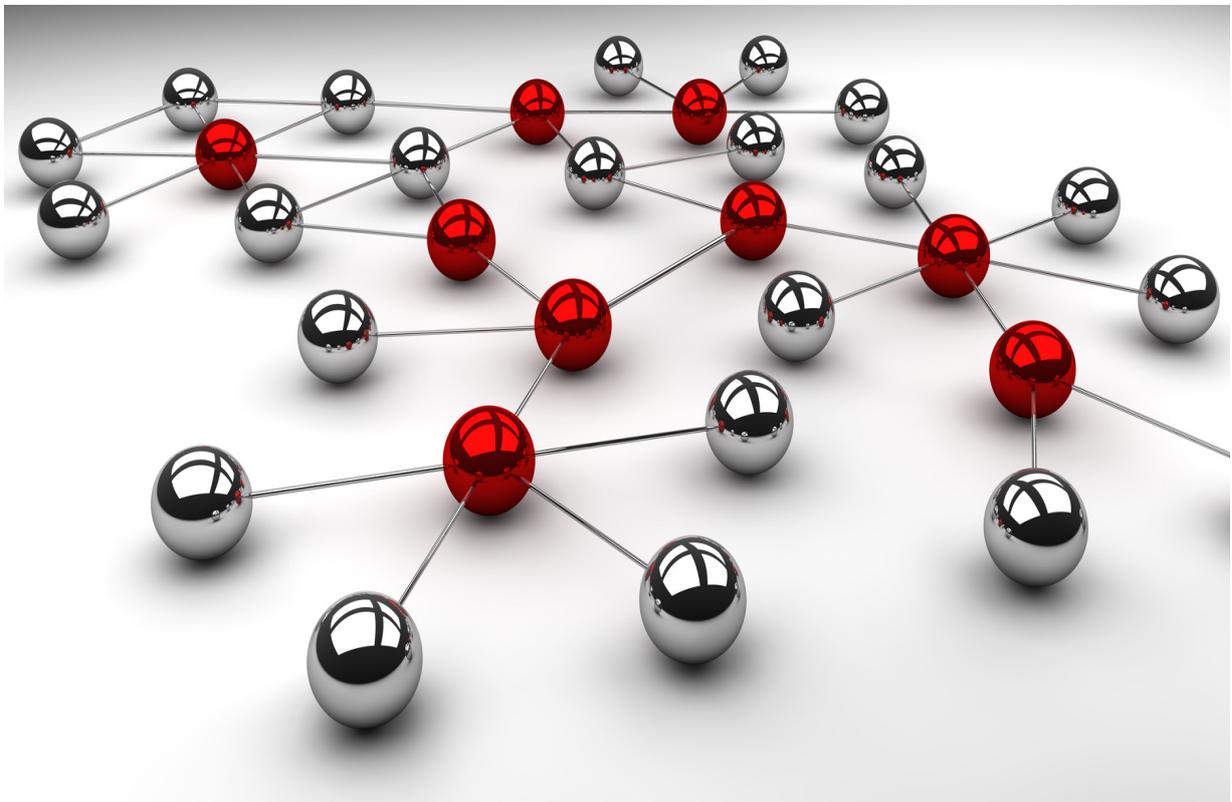# Strategic Influencing -

a practical guide

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A key account manager needs to maintain and build excellent relationships with a range of different people in the customer organisation in order to build and retain the business – there is no one person who is the 'customer' and is the final decision maker.

An international project manager works with a team who are seconded from different functions and countries. None of these work directly for him and all have other priorities in their home functions and countries as determined by their line managers.

A safety and compliance manager in a matrix organisation structure is required to implement corporate guidelines and best practice in the line operation, but has no line authority to instruct or require the guidelines to be followed.

A manager has been tasked with integrating a new acquisition into the existing organisation structure, including closing some uneconomic sites. She has to work with every function and department to get them to harmonise their processes and systems, whilst building enthusiasm and commitment to the new organisation.

Do any (or all?!) of these situations sound familiar to you? If so, you are working in the area of strategic influencing – you have responsibility for a key organisational goal but this cannot be achieved in one step, or without the active involvement of a number of other people who have an interest in the outcome or are central to its achievement. Yet you also are unlikely to wield any positional power or authority over the vast majority of these stakeholders. You need to influence them all in different ways and at different times in order that you can achieve your goal.

How do you go about the planning and execution of a strategy in these type of situations? A case study from our own experience will show how to deploy different models and tools that provide a structure to strategic influencing:

Case study : Delivering a global business service:

Anna was managing a project to supply a business service to a global service company headquartered in Hong Kong. The project started as a local delivery to the European operations, and based on the success of this service, the client wanted to negotiate a global delivery contract. This would mean that Anna would have to take account of specific demands by the Asian and North American operations and deal with global purchasing, as well as influencing other key stakeholders who would have an influence on the final decision.

Until now Anna's main contact person and key decision maker was Elmar, the operational director for Europe. Now she would have to build a relationship with the operational directors of every region, their key advisers and central purchasing led by Kim Yong from purchasing. Anna had not met any of these people before, nor would it be possible to meet them face-to-face given the distances and timescales involved. Yet she needed to understand their needs and their demands for adaptation to the service and its costs whilst being able to maintain quality. The service had been built on a quality reputation in Europe, and this needed to be maintained.

Anna was also only the project manager, she needed to liaise with her partners based throughout Europe who would eventually be called on to deliver the service, and possibly find new partners to cope with the demand, the different languages and the different cultures.

Anna started to explore the specific requests from the regional directors and the ins and outs of the contract in April. In these discussions, Anna identified a number of issues that she would need to resolve :
- Elmar was very happy with the service in Europe, and was championing the service to his colleagues, but had no authority to specify to individual regions;
- the regional directors had no functional knowledge on the content of the service, but held the budgets;
- despite not having functional knowledge, the regional directors had their own ideas about the content of the service;
- the regional directors thought that the service should be delivered by local people who understood local conditions;
- the commercial and contractual negotiation took place with Kim, who had no functional knowledge of the service;
- Kim was concerned that 'standard' purchasing procedures were not being followed – normally a competitive tendering process, not a direct contract negotiation with one supplier;
- Kim also raised concerns about the lack of local presence by Anna's team, but from a budgetary perspective;
- the commercial negotiations did not include the budget holders and service users, and in particular, the service users on whose positive feedback the motivation to expand the service was based;
- Anna was concerned about the ability to deliver the quality required with the changes requested;

Individuals in the negotiation had different focus : content versus budget, local versus global, etc.. Anna had to deal with her own beliefs and assumptions like : 'one need time to deliver quality service', 'only well trained people can deliver the service to our standards',…

Other tensions emerged between individuals and functions on the client side which did not help in reaching a consensus on the way forward. Many meetings were held, face-to-face when possible, but mostly one-to-one via telephone and email as stakeholders were scattered over the globe and were never present in one place.

Eventually an agreement was reached by the end of June, services started in Q4.Each regional director was happy with the adaptations made for the local market, Anna was able to persuade the stakeholders to use the existing European based delivery team in order to guarantee quality, and a mutually acceptable contract and budget was agreed.

The process as described might come across as an easy flow with a desired outcome. The reality is, of course, much messier and confused. It is like looking back on a successful project

- the plan in hindsight looks obvious and simple, but at the outset it is hard to identify all of the tasks, which can be done simultaneously and which need to be in sequence, putting the priorities and timing together and then managing the process.

Success factors :

What helped Anna to reach an agreement ?
- being clear on the outcome desired;
- preparation;
- using appropriate frameworks and tools to create a strategic plan;
- being mentally at the same level of the client : both had a lot to gain by keeping the relationship going;
- understanding the issues raised by the stakeholders;
- listening to the clients' needs, acknowledging their concerns, expressing own needs and concerns, being clear with the arguments brought forward;
- influencing and negotiating rather than trying to persuade : Anna had no line authority over the client;
- maintaining the relationship by taking time and being open to each other's perspective;
- internal support from within Anna's company : trust was given to Anna;
- being aware of own mental models and beliefs and adapting to others;

Learning and Tools from the case study

1   Desired outcome

In the situation described above it seemed that the desired outcome was clear for all as from the outset. That's what it looked like, however when Anna started to explore expectations and needs further both on her side and on the client's side, different interpretations started to emerge. For example, 'delivering globally' had different meanings which, when explored, meant that there was less conflict than originally thought.

So, a first step to take is to make sure that your desired outcome is clear in your head and that it is clear in the heads of other parties, especially those in your own team. Having a clear, concise, precise desired outcome enables one to stay focused during the process and to move all parties involved in a common direction.

2   Preparation

Time invested in the preparation is time well spent, creating time to build and/or maintain relationships; having a strategic plan or road map to guide you; thinking about where to start; thinking about who to involve and when; thinking about timing and sequencing....

Bringing clarity to the preparation and guiding the actions over the period of the discussions, some models and frameworks were used as building blocks. In the case study, Anna's three main models were :

1- Stakeholder analysis & stakeholder influence strategy
2- The Rose of Leary
3- The 'Getting Results Without Authority™' model

All or some of these models and frameworks can be used to guide your strategic influencing situation :

2.1   Stakeholder analysis & influence strategy

The stakeholder analysis and strategic influence models have different but complimentary purposes which enable you to :
- identifying your stakeholders;
- understanding your relationship with your stakeholders;
- developing an influence strategy for each stakeholder;
- reflecting on which approach works best with whom;
- identifying who would be the best influencer besides yourself;

Stakeholder analysis
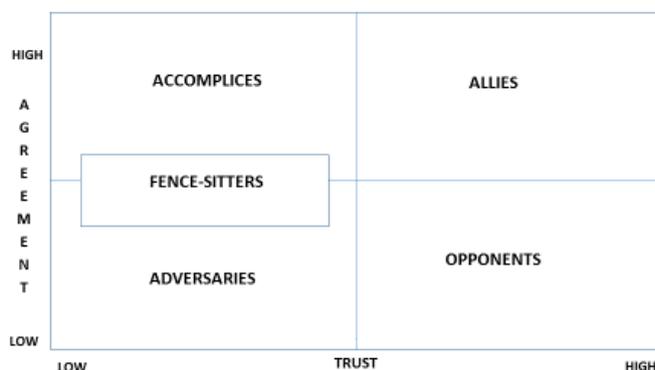
This stakeholder analysis tool, initially devised by Peter Block, plots your stakeholders' relationship to you in terms of their agreement with your intent, and in terms of how much you trust them. Plotting each stakeholder in the matrix helps to identify an influencing strategy depending on where the different stakeholders are placed. Your approach will vary in terms of content as well as intent – do you want to build a more trusting relationship or to influence towards agreement. Generally speaking the best strategy is to move people from left to right, increasing trust, before trying to gain agreement (it is better to have an Opponent who you trust than an Accomplice who you do not). You could also identify that it be useful to seek help from a colleague, another stakeholder,….to influence someone due to their better position or relationship.

Influence strategy

Listening to your stakeholders and exploring what helps or hinders them can reveal unexpected information, valuable to both parties. This is where the influence strategy tool comes into play – you can identify concerns and opportunities relating to each stakeholder to help devise a unique approach for each of them. Being aware of the global picture enabling to put the organisation before your own ego and being cautious with the relationship rather than 'pushing through' your outcome creates trust between the parties. Trust is a not to be underestimated value - trust can make or break a contract.

Stakeholder	Desired outcome / action / behaviours	Issues / concerns	Identify win/win	Influencing strategy			
				what	who	by when	measures

The outcome from this analysis:
- an extended network of people who support your idea, point of view, ….
- gaining insight in 'who should be your influencing target' or 'are you targeting the appropriate stakeholder – if not, gaining insight in what to do;
- possibility to build new relationships and expand your network;
- a network of people who are open to listen to each other, putting aside first judgements and creating together a space/environment to explore what is best for the organisation rather than for the individual;
- building trust;
- identifying a unique influence strategy for each stakeholder;

2.2   The Rose of Leary

Dr. Timothy Leary describes, in an easy to understand/apply way, communication patterns between people : whether you are working together with each other or opposed to each other, whether you are putting yourself above someone or below someone. Each position has its purpose, only some positions are more appropriate than others when it comes to influencing.
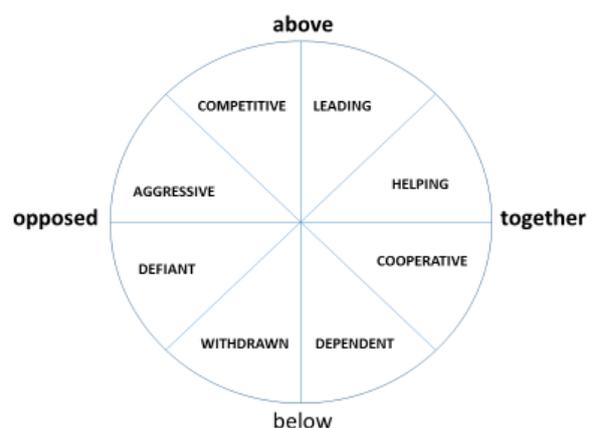
Understanding and identifying how you relate to your stakeholders enables to become aware about your own mental position and processes. The self-development exists in identifying what it takes to feel at ease with your 'counterpart'.

When feeling at ease, you are able to lead an influencing process constructively, helping the other person to accept your position. When not feeling at ease you convey a message other people could take advantage of – depending on your relationship with them.

Ideally, if all parties involved remain in a give-and-receive movement, a constructive dialogue is induced. And, given we are not living in an ideal world the model helps you to recognise what happens when conversations go sour. Having the ability to bring yourself and others back into the give-and-receive movement re-establish a constructive conversation.

Outcome :
- being aware of your own mind set allowing to undertake some self-development if required;
- adapting your communication style as required by the situation;

2.3   The 'Getting Results Without Authority™' model
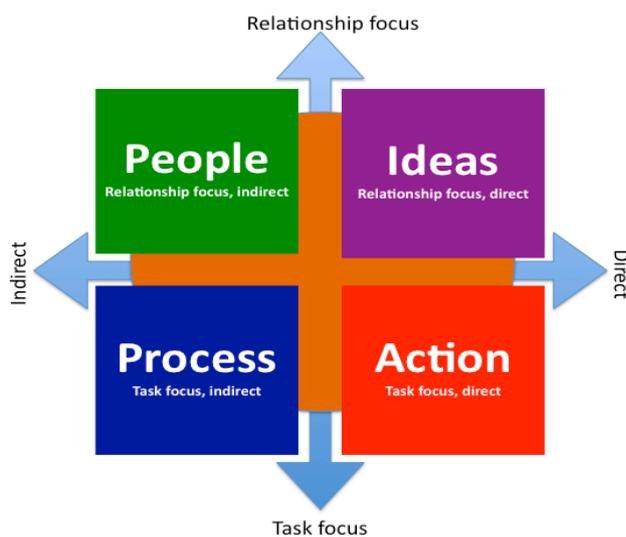
Developed by New Directions, the 'Getting Results Without Authority™' influencing behaviour model describes the impact you might have by using a behaviour. You can influence by focusing on the task or on building the relationship. And you can do this in a direct way, or in a more indirect way. Each gives a different approach or style of influence – Action style where the focus is on doing quick task deals to move forward, Process style which is about logical persuasion, People style where the focus is on understanding other perspectives and people, and Ideas style which builds cooperation through common interests.

Each of us has a personal style preference when it comes to influencing another. Equally the target of our influence have their own preferences. The strategic style choice lies in knowing and choosing to use the preferred style of the other party and choosing the style which gives you the outcome you need. In the end, all perspectives are needed and all are equal to each other. It is the ability to identify the most appropriate style for the situation, being able to adapt to 'speak the language' of the other party, and then being able to move effectively and flexibly between the behaviours that provides the key to success.

Outcome :
- being able to switch effectively between different influencing styles according to the required circumstances creating openings to unexpected revelations holding key information and to move together into the desired outcome;
- assessing which behaviour might be most appropriate to start, conduct and close a conversation sets the scene for a constructive meeting as well as a long standing relationship;
- applying the analysis from the stakeholder analysis and Rose of Leary to target your influence energy

Your own situation :

It is clear that when it comes to influencing strategically, preparation is key to the success. Planning a path through the confusion and chaos, that is the future when viewed from the present, is where the tools and models come into play. Getting a compass bearing by having a clear goal; creating a map of stakeholder relationships; understanding your own abilities and building networks and support systems to fill gaps; having a set of behavioural tools in order to deal with every situation and obstacle; and having a detailed route map for guidance. All this is what helped Anna to bring her project to a successful conclusion.

For your own situation, can you answer :
- Who are our key stakeholders and how well do we know them ?
- How can we build on and expand our network ?
- Can we manage this discussion on our own or would it be wise to involve people from our network – if so, who ?
- Which sequence of discussions will help to stay as close as possible to our outcome and yet still gives flexibility ?
- How can I stay in control when there is so much going on at different times and in different places ?
- How can we remain in contact with what we believe in rather than being attracted by the Euro's ?
- Where are the gaps in my own skills and abilities that need to be filled through some personal development ?

Using a combination of tools, personal preparation and self-reflection will help you to manage your own strategic influence situation as well as Anna. Like all strategic projects, planning for strategic influencing situations is often best done with help. Having a support team, ideally those involved in the delivery, helps to give clarity and new perspectives, especially in the analysis and use of the models. The authors regularly run workshops for people that focus on their real strategic influence situations and create a supportive planning and learning environment. For more information please contact Anita Vandevivere. anita@timeout.be or Geof Cox Geofcox@newdirections.uk.com

deploying your network