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Exerting Influence Without Authority – What’s in Your Toolbox?

Candice Benson
WITI Boston
September 9, 2015



Congratulations - you've been asked to lead a change initiative or large project! But there's a hitch - its success depends on the cooperation of several co-workers across your organization over whom you have little or no formal authority.

If you're like most individuals, you face this sort of challenge frequently and need to get things done through peers inside and outside your organization. In this age of virtual teams and multiple functions within and even between companies, how can you influence others?

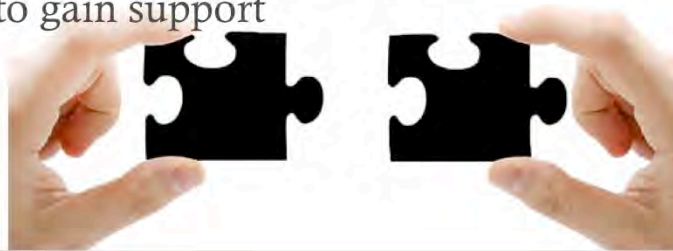
During this session you will learn ways to develop skills and techniques such as:

- Constructive persuasion and negotiation
- Personal styles for effective communications
- Political support or access to important resources

Our Objectives Today

Learn:

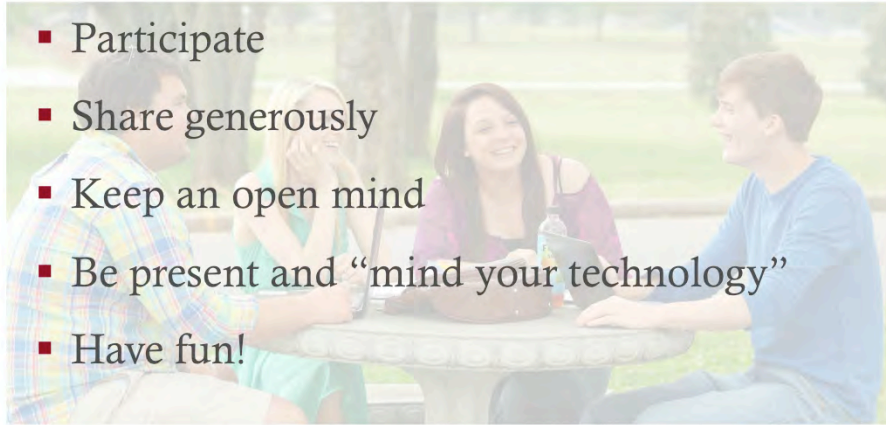
- tactics for taking charge of your project
- methods to hone your persuasion skills
- how to be a great communicator
- tactics to gain support



Today's objectives.

Ground Rules

- Participate
- Share generously
- Keep an open mind
- Be present and “mind your technology”
- Have fun!



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Ground rules.

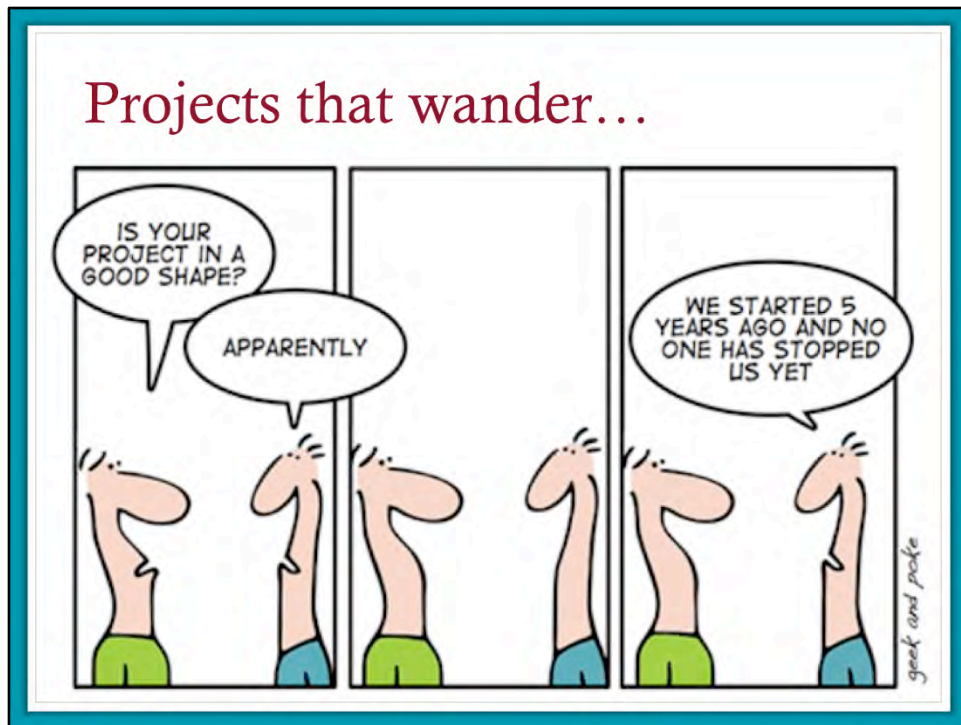


I. The Power of Process

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Section 1. The power of employing a project management process.

Projects that wander...



We've all seen these projects that go on for years – they must be going along fine if no one is stopping us!

Identify all the participants

- Project team members
- Stakeholders
- Influencers
- People to keep informed



Steps to taking charge of the project team:

Organize the project team members.

Who are the stakeholders?

Who are the influencers?

Who are the people who need to be kept looped in but are not on the core team?

We'll talk in more detail about this later.

Harness the power of process



Locate or create
a Project
Management
Process (SOP)

If the organization has a documented Project Management Process, locate it. If not, work on developing one. It builds the foundation for team-member agreement and ensures everyone knows the operating procedures.

If you need help developing this, get in touch with me!



It's vital that you get everyone to agree to support the documented Project Management process. Once everyone has publicly agreed to it, you've leveled the playing field and established your leadership role because everyone has committed to supporting the process you are managing. If anyone deviates from the process, you can discuss the agreement with them, what isn't working, and how to fix it.

Success Fundamental #1

Organize, and embrace the process!



Success Fundamental #1: Organize, and embrace the process!



II. Persuasion and Negotiation Techniques

Section 2: Persuasion and negotiation techniques.

Use message boosters not stealers

Message Stealers	Message Boosters
<ul style="list-style-type: none">▪ “We don’t...”▪ “We can’t...”▪ “We’re unable to...”▪ “We only have...”▪ “Unfortunately...”▪ “Unavailable”▪ “...but...”	<ul style="list-style-type: none">▪ “We do...”▪ “What we can do is...”▪ “We will be able to...”▪ “We have the...”▪ “Fortunately...”▪ “We have this available...”▪ “...and...”

Be sure to speak positively when talking to others about the project. Use Message Boosters, not Message Stealers. If someone comes to you and asks to make a change on something, frame your response in a positive way. You may not always say yes but the way you send the message makes a difference. Do it positively! Ensure they know that you’ve listened and taken their needs into consideration. Tell them, we can do this!

When talking with a stakeholder, be honest about where the project is. If it’s not positive, you might be tempted to use negative language, but use the more positive words: “Here’s where we are, here’s what we’ve been able to do well, we really could use such-and-such, here’s what I need.”

Success Fundamental #2

Focus on *them*! How can you help?



Have you ever been at an airport counter when someone is very upset because their luggage didn't arrive with them? Sometimes you'll see people who will yell in frustration at the man or woman behind the counter. This is rarely a productive tactic. It will work much better if you focus on THEM and ask what you can do to help achieve a successful outcome.



In teams of two, practice framing messages positively and focusing on helping the other person to achieve mutual goals.



Section 3. Communication styles and tendencies. Applies to leadership, teams, sales, service, and building relationships.

To increase our effectiveness in any capacity, we need to increase our awareness of how we project ourselves and how we impact (or don't impact) others. In addition, if we recognize the communication styles of others, we can leverage techniques to supply information the way they wish to receive it.

When you understand your communication style, you can approach your own work in a manner that best suits your style, including how you manage your time, problem-solving, best approaches to decision-making, and dealing with stress. It is also important to consider the best ways to communicate with people of different styles.

Remember that we humans are complex beings who shift styles from time to time, depending on life circumstances, and no person operates exclusively in one style.

Communication Style Grid

Thinker



Driver



Amiable

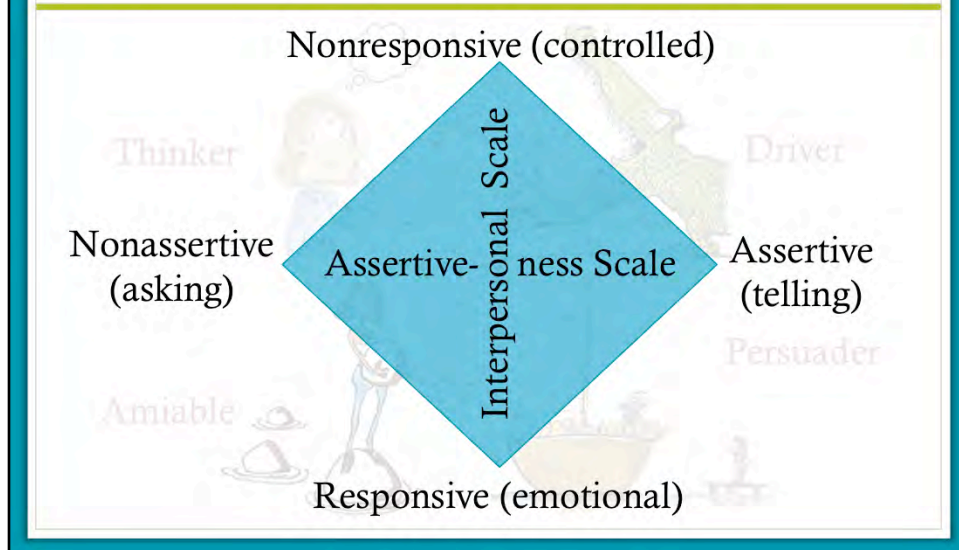


Persuader



The model that we'll discuss includes the four broad categories of **Thinker**, **Dominant/Driver**, **Social/Amiable**, and **Expressive/Persuader**.

Communication Style Grid



These communication styles can be placed on a grid that corresponds with a person's level of responsiveness on one axis, and his or her level of assertiveness on the other axis.

Take the test!



Answer the following 8 questions, choosing the option that would usually apply to you most frequently or most accurately, and the option that would least apply to you. Write down both corresponding letters from the right-hand columns.

Communication Style Questions - 1

Question	Most	Least
When speaking, you...		
- Are soft spoken	C	A
- Speak loudly	B	D
- Speak self-assuredly	A	C
- Speak unemotionally	D	B
When speaking, you...		
- Have a calm, friendly tone	C	A
- Speak rapidly	B	C
- Cut off small talk	D	B
- Try to control the conversation	A	D

Communications Style Questionnaire – Questions 1 and 2

Communication Style Questions - 2

Question	Most	Least
When listening, you... <ul style="list-style-type: none"> - Answer very quickly - Are receptive and friendly - Are lively and respond energetically - Are very attentive to what others say 	A C B D	C A D B
When questioning, you... <ul style="list-style-type: none"> - Inquire about feelings - Seek key facts - Seek more information - Ask "how to" questions 	B A D C	D B C A

Communications Style Questionnaire – Questions 3 and 4

Communication Style Questions - 3

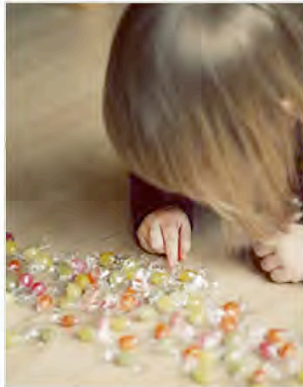
Question	Most	Least
Describe your physical behavior		
- I pace or move around a lot	C	A
- I gesture a lot with my hands	B	D
- I am reserved in my expressions	D	B
- I maintain friendly eye contact	C	A
When responding to people and events, you...		
- Are enthusiastic	B	D
- Are relaxed	C	A
- Are restless	A	C
- Keep your distance	D	B

Communications Style Questionnaire – Questionnaire 5 and 6

Communication Style Questions - 4

Question	Most	Least
Describe your interaction with others		
- I am friendly	C	A
- I observe without interrupting	D	B
- I try to take charge	A	C
- I express feelings openly	B	D
When responding to tasks or relationships, you...		
- Are spontaneous	B	D
- Draw quick conclusions	A	C
- Respond cautiously	D	B
- Are cooperative and systematic	C	A

Communications Style Questionnaire – Questions 7 and 8



Count the letters

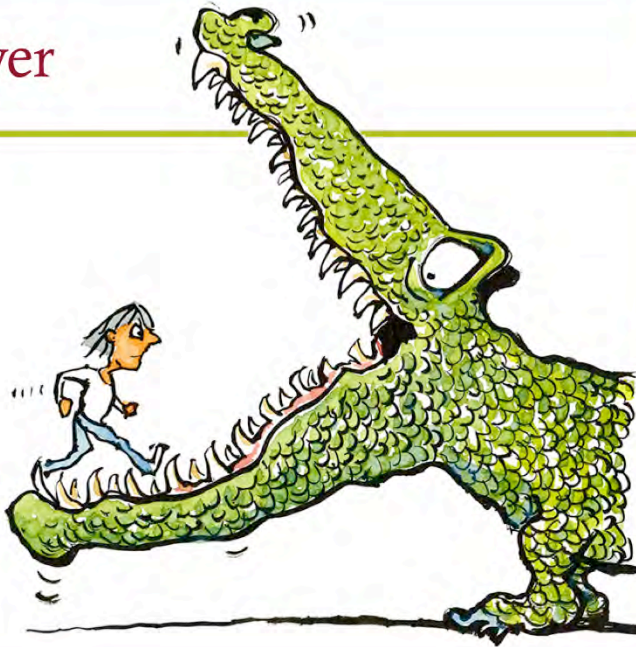
- Count ALL the letters
A, B, C, D
- Which has the most?
(Your primary style)

The Communication Styles test has 3 levels (degrees of intensity). Download the full scoring system here:
bit.ly/BensonResources (case sensitive)

Visit the Benson Consulting website to download the full Communications Styles questionnaire and scoring system.

A = Driver

Direct
Forceful
Decisive



High Intensity: Direct, Forceful, Decisive

Moderate Intensity: Competitive, Self Reliant, Unobtrusive

Low Intensity: Cautious, Mild, Modest

- Drivers are generally the dominant people on your team. Not all drivers are bosses and not all bosses are drivers.
- Drivers act as our masterminds, inventors, architects, and field marshals. They are pioneers. They are natural leaders.
- Drivers understand control and willingly exercise power. Ambitious, forceful, and determined, Drivers actively tackle challenges.

A = Driver

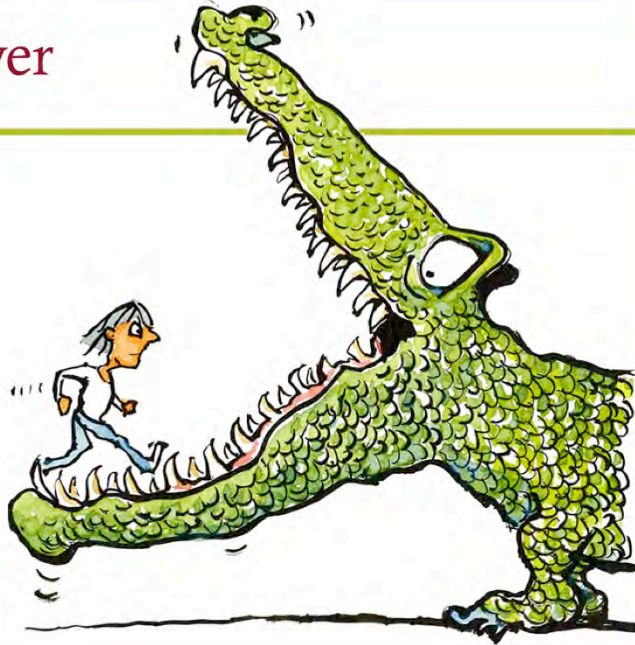
Direct

Forceful

Decisive

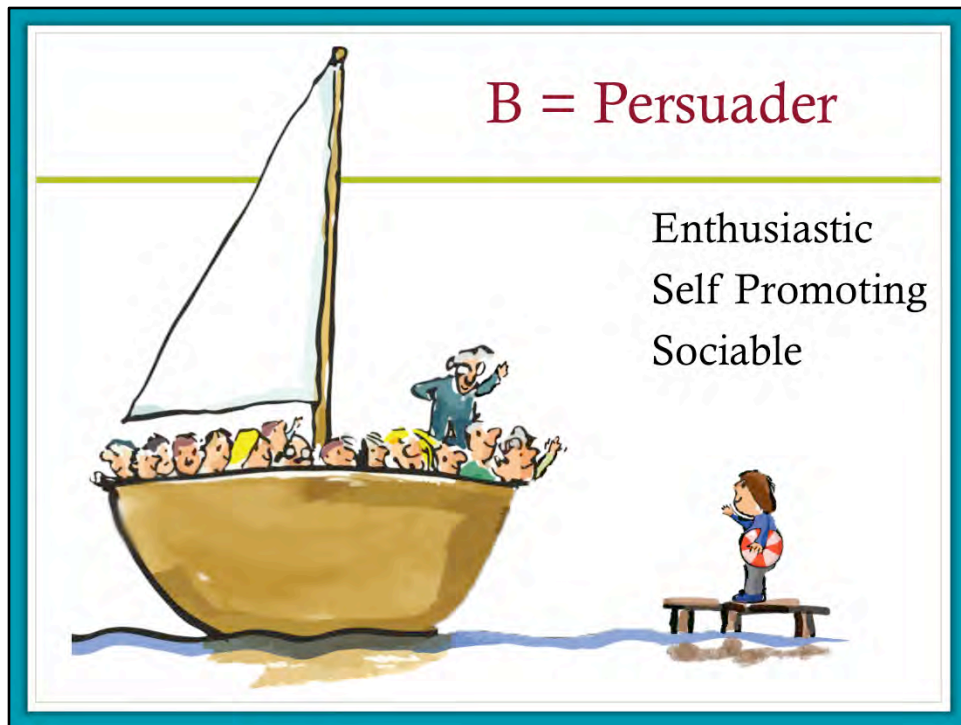
They value
action and
results over
process.

Mirror their
faster pace.



To work with a Driver, know that they value action and results over process. Mirror his or her faster pace, high energy, and focus on the horizon. Arrive well-prepared and keep your commitments.

A Driver's potential weakness is unintentionally leaving others feeling as if they have been mowed over because Drivers don't naturally account for the emotional implications of their style or decisions. Drivers may tend to not include those affected in decision-making, or they may not allow enough research to be done or voices to be heard. They sometimes come across as egotistical when, in actuality, they are just concerned and committed to the result. They don't see themselves as better than others.

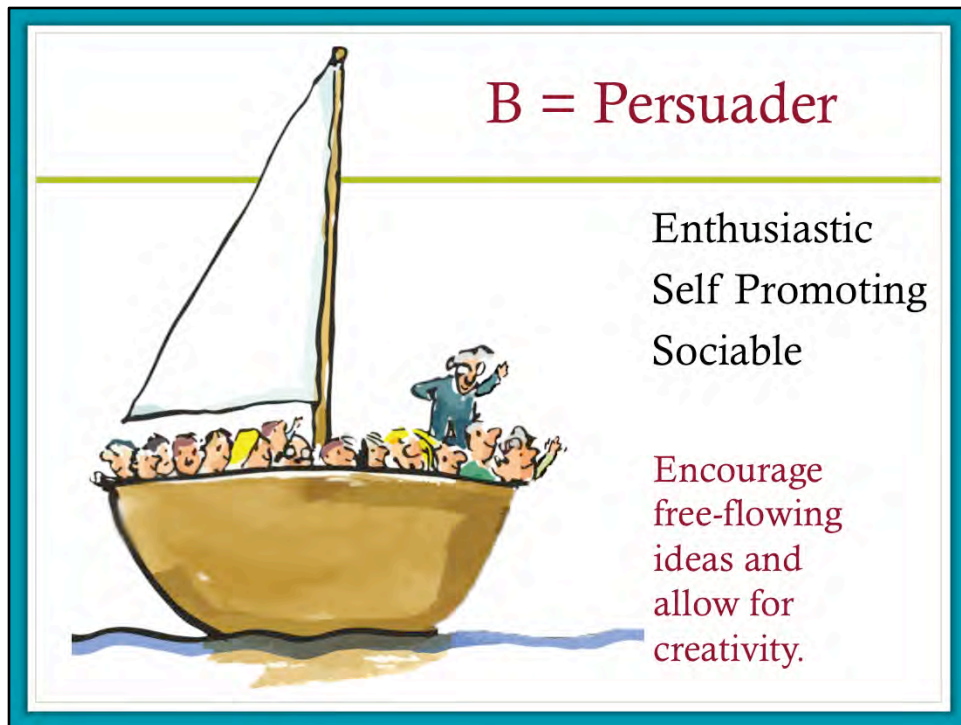


High Intensity: Enthusiastic, Self Promoting, Sociable

Moderate Intensity: Poised, Confident, Reflective

Low Intensity: Controlled, Pessimistic, Withdrawn

- Persuaders are colorful and optimistic champions who are the promoters, performers and persuaders on your team.
- Persuaders excel at delivering creative work and influencing others to support your mission.
- Persuaders can deliver terrific campaigns and programs, including fundraising, and can inspire others beyond anyone's expectations.



To work with a Persuader, encourage free-flowing ideas and allow for creativity. Have a white board and pens handy. They value energetic interaction. Be candid and forthright (they hate not being on the inside track). Let them “think out loud.” Bend the rules when you can and don’t get hung up on paperwork or process.

A Persuader’s potential weakness can be in overwhelming people with too much talk or over-the-top enthusiasm. Usually somewhat disorganized or scattered, they can also come across as pushy or opinionated. Their impulsiveness and lack of concern with detail can get your organization in trouble.

C = Amiable

Patient

Predictable

Cooperative



High Intensity: Patient, Predictable, Cooperative

Moderate Intensity: Mild, Deliberate, Mobile

Low Intensity: Critical, Restless, Spontaneous

- Amiables build relationships naturally and network easily. They get their energy from being around other people.
- They are natural teachers, care-givers, healers and counselors. They are generally seen as warm, cooperative, loyal, and dependable.
- Amiables value consistency, stability, security and a steady pace. They value diversity, excel at bringing others along, and thrive in participatory learning.

C = Amiable

Patient

Predictable

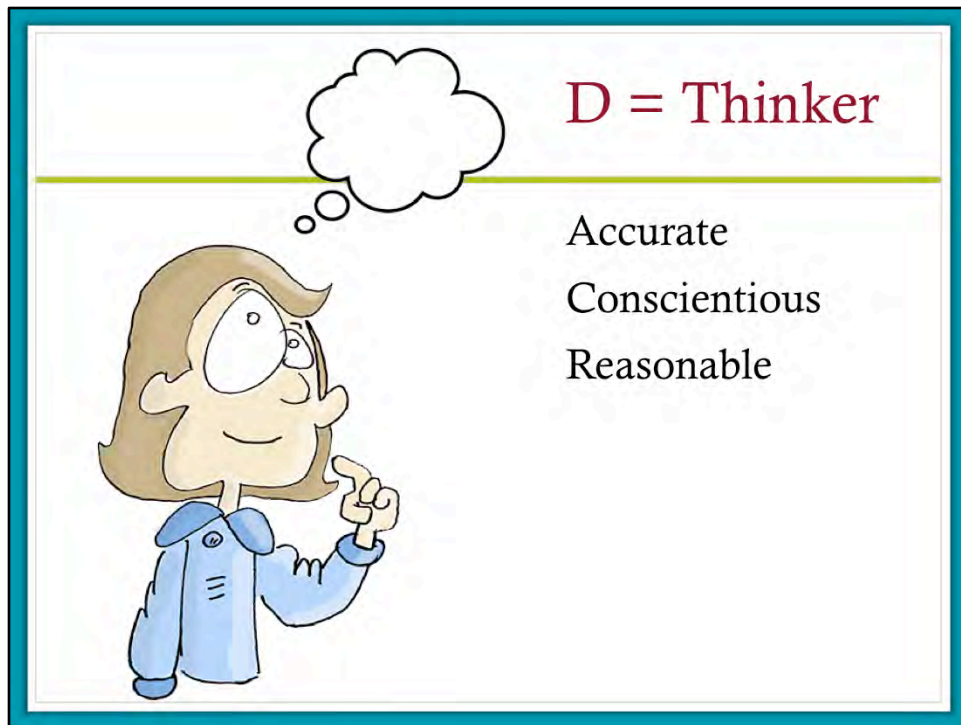
Cooperative

Use friendly
repartee and be
gracious. Share
stories and food
at meetings.



To work with an Amiable, don't forget the friendly repartee and be gracious. They value frequent interaction. Share stories and food at your meetings. Include others, welcome newcomers and allow plenty of time for discussion. Plan carefully and keep things running smoothly.

An Amiable's potential weakness is that they typically struggle with change and don't do well with uncertainty or shifting priorities. They like life to be linear (which, of course, it often isn't). Unless you walk in with homemade blueberry muffins, they don't generally do well with surprises. They usually resist new ideas, and can come across as barriers to innovation.

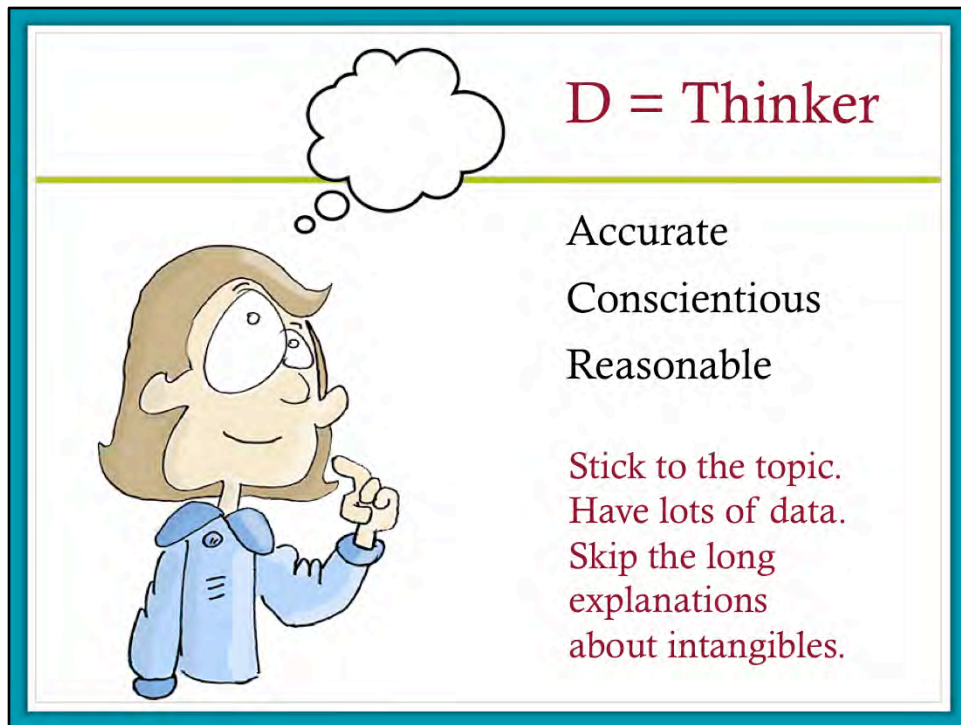


High Intensity: Accurate, Conscientious, Reasonable

Moderate Intensity: Analytical, Indirect, Persistent

Low Intensity: Random, Daring, Reactionary

- Thinkers are the framework leaders in our organizations who build infrastructure, organizational systems, procedure, and consistency.
- They focus on the concrete and measurable, valuing a deliberate process and regulations.
- Thinkers make logical, thoughtful decisions only after careful research and deliberation.



To work with a Thinker, stick to the topic and have lots of data on hand. Thinkers value substantive interaction. Ask and answer questions directly and skip the long explanations about intangibles. Don't make a lot of small talk or press to be a confidante or pal.

A Thinker's potential weakness can be in "analysis paralysis" — being unable to make a decision until ever-more information is gathered and absorbed. They might not see the hidden emotional, political, or unspoken undercurrents of a situation. They sometimes come across as antisocial, skeptical, or critical.

Giving and receiving information

Get to the point!



Tell me everything!



Generally, you'll observe two ways people prefer to receive information:

Get to the Point! People who communicate in this style thrive on short and sweet. Give them the gist of what they need to know in as few words as possible. (They're not going to pay attention to the rest anyway.)

Tell Me Everything! These people need the details or they may find themselves frustrated or overwhelmed. Provide specificity and thoughtful guidance to build confidence, as well as the relevant back story or overall project perspectives as needed. Modify your communications to their needs, but be careful not to let an excessive need derail anyone's output.

By working with each person in their own communication style, you'll improve their efficiency in completing project deliverables on time. Look for clues as to each team member's communication style during both your team meetings and your one-on-one interactions, then use their style to boost their performance and reach the team's goals.

Success Fundamental #3



Recognize and
leverage
different
communication
styles!

Success Fundamental #3: Recognize and leverage different communication styles!



IV. Achieving Success

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Section 4: Achieving success.

Working with all participants



- Project team
- Stakeholders
- Influencers
- People to keep informed

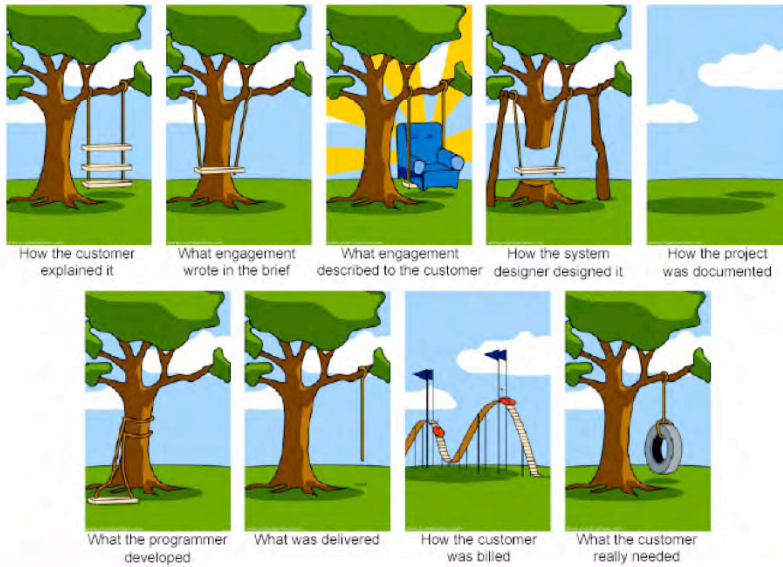
Earlier we talked about identifying all of the project's participants. Now we'll talk about techniques for working with them.

Use your communication skills



First, use the communication skills we've talked about.

Set clear expectations



Set clear expectations. This drawing is a humorous look at confused expectations.



It's very important to be transparent and straightforward with all participants. Be sure to talk about risks, actions, issues, and decisions (RAID) and obtain clear understanding and agreement.

Be prepared to have the difficult conversations. You must escalate any matters that threaten your project or have the potential to do so. Sometimes project managers are tempted to hold off on this action because they believe they may be perceived as ineffective or not up to the task. However, failing the task completely would be a much worse outcome, so expect to take charge and deliver the unhappy message if the situation arises.

Working with the project team



Working with the project team members.

Get team members to agree:

- Roles
- Responsibilities
- Meeting schedules
- Status updates
- Functional communications
- Escalation parameters

Soon after your project kick-off meeting, work with the team to structure the project's Functional Communications, which articulate:

- when information will be distributed,
- by whom,
- who will receive it,
- what will be included, and
- how it will be sent.

Agree on how often meetings will be held, who will be included, and what areas will be covered.

With the team, articulate the escalation parameters – when and how will issues be communicated?

Working with stake- holders



Determine who all your key stakeholders are. Some of these people will be evident, such as your boss, the project's overall leader, the division's highest executive, the company's CEO, or your project's executive sponsor. However, there are likely to be additional people who are impacted by your project but might not be as readily apparent; these people should be identified and added to the list. For example, department heads impacted by the project's deliverables or its timeline may need to be informed, consulted, or invited to attend selected meetings.

Here are additional ways to uncover stakeholders:

- Start off your project with a thorough kick-off meeting, including the team's identification of project stakeholders and their relationship to the project.
- Speak with key contacts about prior projects and their stakeholders. Also determine whether a steering committee or executive board should be involved.
- Investigate whether there are documented organizational policies or processes that identify additional stakeholders. For example, representatives from the company's legal, audit, or compliance departments may need to be looped in.

Ask for what you need



Communicate with your stakeholders effectively. Clarify with each stakeholder what they require and what you require.

What do they require? Articulate what is expected of you. What are the success metrics? Also establish how often each stakeholder expects to receive reports from you, what information they need, and in what format. Identify the circumstances in which you would be expected to escalate matters to their attention.

What do you require? Project managers often focus on what stakeholders expect from them and how they can be successful; however, it's equally important that you articulate to each stakeholder what *you* will need from *them* to ensure your success. Don't skimp on this step or you may impede the project's outcome. Strive for clarity. Examples include:

- You'll need the stakeholder to declare their support for the project and for you as the project leader. (An executive sponsor is especially helpful.)
- You'll need them to actively participate at particular times or in particular ways.
- You'll need specific commitments, or prioritization of key elements, such as certain resources or deliverables.

After each meeting, write and send an email that summarizes the discussion and bullets the specifics of your agreements.

Managing influencers

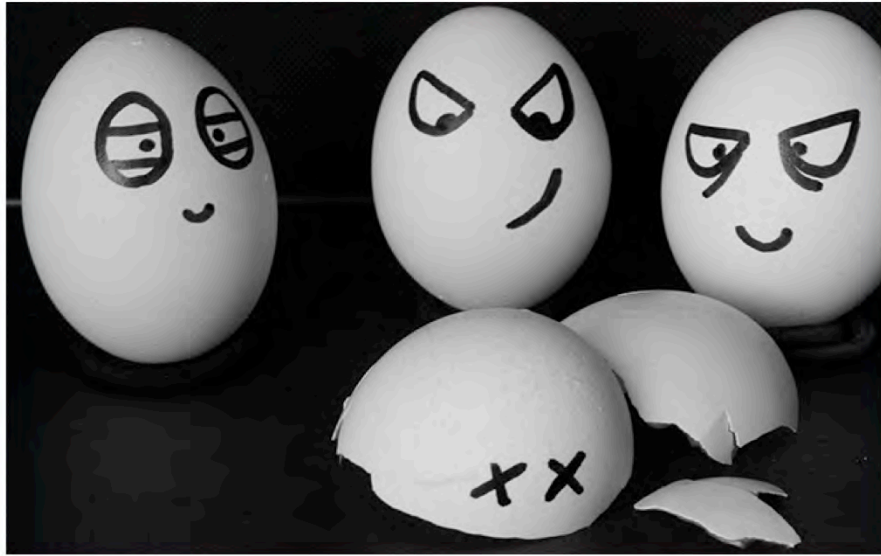


An influencer may be a stakeholder or one of the project's decision makers, but in reality is even more powerful. Influencers are capable of swaying the thoughts and actions of those around them even if they hold no title or authority. This is the person who says, "Try this restaurant/movie/etc.," and everyone beats a path to the door. Identify them as soon as possible because they have an impact on your project outcomes.

Influencers may be on the project team and you can spot them by the group dynamics or how often their names come up in conversation with others. Or, they may not be part of the project at all. They often have a strong relationship with a key decision maker, or they may be in that chain of command.

This is a key group to consider because if they support your efforts, that can be a great enabler – but if they don't, they can push you off the swing.

Managing negative influencers



Pay special attention to negative influencers. Influencers with a lot of negative energy tend to suck the air out of the room upon arrival. When influencers support the project's direction or they support you as the leader, it's great -- but if they don't they can create resistance -- even without your knowledge -- and impede your progress. Negative influencers can impede your project in other ways, too: they may refuse to commit resources, or make sure they're not available for key discussions, or fail to provide important information or specialized knowledge the project needs at the right time.

If you find yourself in this situation, try these things:

- Identify each influencer.
- Determine each person's communication style and how he or she likes to receive information.
- Proactively involve the influencer in discussions and decisions.
- Create a congenial relationship by communicating that you value his or her input and you can tell that others do, too.
- Find out what goals or objectives the person has and, where possible, explain how your project can help meet those goals. Help him or her to see the project's benefits.
- Invoking the project's documented Project Management Process, help him or her articulate what aspects of the process aren't working and how you can make them better.

Success Fundamental #4

Communicate, communicate, communicate!



Success Fundamental #4: Communicate, communicate, communicate!

Most importantly:

Take action!

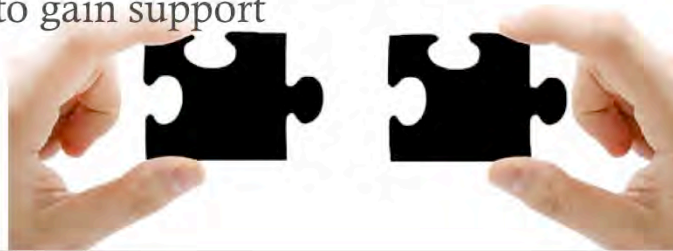


Please speak with me if you are about to embark on a significant change effort or see the need to do so but don't know how to get started. I would love to chat further with you about it!

Our Objectives Today

We covered:

- tactics for taking charge of your project
- methods to hone your persuasion skills
- how to be a great communicator
- tactics to gain support



What we covered today.

Questions?



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Please contact me if I can help you with additional questions!

Let's stay in touch!

- Candice Benson, CEO, Benson Consulting Inc.
- Phone: 603-232-8297
- Email: candice@bensonconsultinginc.com
- LinkedIn: www.linkedin.com/in/candicecbenson
- Twitter: @BensonConsult
- Web: www.bensonconsultinginc.com

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