



11%

The average of responses to the question:
"What percentage of your job do you
get done through your formal authority?"
asked in Master the Matrix Workshops.

Introduction

Influence Is How Things Get Done

Mike, an emergency room doctor, had just made the move from clinical practice to a role in administration, leading the efforts to introduce new information technology to the hospital system, when the need for influence hit him and hit him hard.

"I had what I thought was a title and credentials that could make things happen—I assumed the title and the letters after my name said it all. When I started, I knew I needed to make some big changes. That's essentially why they brought me in. I did a great job asking questions—I asked a ton of them. So I didn't fall into the 'know-it-all' trap. The mistake I made was that once I asked the questions, I just declared what I wanted done. I'd send an email, maybe call a meeting and tell people.

"What I didn't realize was that this approach (some it labeled 'Mike's Proclamations,' others called it strong arming, although I didn't know that at the time) was all wrong. I was relying on my title's 'power' and doing nothing to build ownership or understanding or real sustainable change. I was treating everyone as if it was the ER and they all worked for me, and telling them what I wanted. No collaboration, no working together—just declarations, based on my own opinions and needs. No real influence.

“So I got the feedback, and I started pulling people in. I finally saw that when working cross-functionally, I had to do things differently. But then something really blew me away. My boss pulled me aside and said the declarations weren’t working for my team, either. They needed to be influenced, and I needed to collaborate more with them to establish a sense of ownership in the changes.

“And then he said something that will always stick with me: ‘Mike, anybody can play the title card—that doesn’t take much skill or finesse. Real influence comes from building relationships, ownership and getting people engaged. Even the CEO has to influence—title just doesn’t matter.’”

Stephanie was in a different situation. She was a project manager with more responsibility than could fit in a job description and formal authority of exactly zero. She didn’t have the title, she didn’t have authority—but what she did have were some enormous milestones for a pharmaceutical product in her company’s development pipeline.

People thought she was crazy to take the job. In fact, the project had already spit out three other managers who either tired of not making progress or burned bridges so badly in their attempt to make progress that the organization rejected them.

She could have lobbied for resource authority—some direct reporting relationships to the project team. She could have made a case for a bigger title. Instead she focused on relationships—both on and outside the team. She deliberately reached out to people to build trust, get input and build buy-in. She got to know the business and business needs as well as the informal workings and the “chess game” required to get things done. She realized a crucial part of the game was thinking several steps ahead and anticipating the reactions of others. And she communicated, dialogued and persevered through a lot of information gathering, consensus building and difficult conversations that others simply weren’t willing to do.

Mike and Stephanie’s stories will unfold throughout this book. Mike provides great illustrations of the pitfalls, and through Stephanie’s story you will see what it looks like when it’s done right—how she used the energy that others exerted trying to fight the model to make the model work for her.



Worksheet
**YOUR INFLUENCE
INVENTORY**

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What ever happened to authority?

Mike and Stephanie represent a common reality in today’s organizations—formal authority (represented on org charts and in titles) simply isn’t the driver it once was. Cross-functional teams, project teams, center-led functions, centers of excellence, shared services and “flatter” organizations have blurred and in some cases completely erased traditional lines of authority.

Gone are the days when your title defined your power and decision-making rights. Today, influence reigns as both king and queen of our organizations.

The influence we are talking about here is not your traditional persuasion. It's not the used car salesman urging you to buy the "real gem" of a beat-up Chevy. It's not easy. Influencing takes strategy, planning, and plenty of patience and perseverance.

The problems we face, decisions we make and projects we run are complex—a reflection of the sophisticated products our organizations design and manufacture, markets they operate in and regulatory environments they must navigate. Very rarely does all this work reside neatly in one function, team or location—our work and our organizations have become *cross-functional*. It requires us to reach across functions and geographical boundaries. And once that reach happens, influence is required—because unless you have the biggest title on the organizational chart, your authority doesn't cover it all. And where authority ends, influence begins.

Now here's where things get really tricky: when you are influencing across the organization, goals, priorities, objectives and agendas often conflict. It's one thing to convince a fellow IT person of the value of a common technology platform. Try getting HR to buy into the same technology platform as Finance. Or any common platform at all—even the idea of a platform! Influence replaces authority with a twist: not only do you not have the leverage that authority provides, you must collaborate with people who see the organization from a completely different perspective.



Worksheet YOUR INFLUENCE ASSUMPTIONS

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Influence Ingredients: Proactive and In the Moment

There are two types of people who can influence—those who are persuasive conversationalists and those who build up influence equity over time. Not surprisingly, the latter are the ones who can have a sustained effect in organizations.

When you are influencing cross-functionally, relationships are key. I call these relationships "partnerships" (more on this in Chapter 1). In cross-functional work, you are either influencing a current partner (and through this influence opportunity have a chance to develop the partnership or leverage the current state of the partnership) or you are influencing someone who may well become a partner in the future. Influence in organizations rarely happens in isolation—it usually won't be your first or last interaction with the person you are trying to influence. What that means is that your level of influence starts well before you jot a few persuasive ideas down on paper or put together a couple of compelling PowerPoint slides—it's built over months and years



Worksheet
**WHO INFLUENCES
 IN YOUR ORGANIZATION?**

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and is all about your credibility and reputation in the organization. It also means that how you handle the opportunity to influence impacts not only the issue at hand but also your partnership and future influence prospects.

I introduced five influence ingredients in *Master the Matrix*. Here, I've expanded that list to six and built a new model to describe them. Three ingredients are developed over time, *proactively*. The other three are situational, opportunity-based and applied *in the moment*:



You reap what you sow when influencing in your organization. The “sowing” is what I call the “**Proactive**” ingredients. These include forging partnerships in your organization (*Chapter 1*), building trust by demonstrating willingness to be influenced (*Chapter 2*) and building knowledge of the organization (*Chapter 3*). This sowing takes place all the time. Each day is an opportunity to build trust, credibility and equity in the organization, which can all be applied when it comes to the moment of truth—actually influencing something.

The “**In the Moment**” ingredients are those you apply to a specific influence opportunity. They include *prepare*—identifying and assessing the people you will be influencing and framing your message (*Chapter 4*), *dialogue*—how you conduct a conversation that lends itself to influence (*Chapter 5*) and *follow-up*—making sure that what you have influenced actually gets implemented (*Chapter 6*).

We will look at each of these ingredients in the chapters that follow, but

know that for any given situation, you may not need all six. Establish the three proactive ingredients, and the in-the-moment ingredients don't have to be 100% buttoned-down. If you don't have the proactive ingredients in place, you will have to really excel in the moment—when trust is not established, a highly effective dialogue is needed to fill the void.

Using this model in the chapters that follow, I take the approach of slowing things way down—really thinking through and planning the process of influencing. Think of it like learning a physical skill, for example hitting a golf ball. The golf pro will have you slow down your swing (either literally or on video) to analyze it and make improvements. That's what I will be doing with influence. In the end, these techniques can be applied both in a planned way well ahead of time and spontaneously when someone stops you in the hall with something you need to influence on the spot.

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