



The Influencing Process



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THE INFLUENCING PROCESS

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INTRODUCTION

I started off my life in America selling life insurance, a business where if you don't have the ability to influence your customers to buy policies from you then you don't reach success or make money. Since I was new to the country and in need of both, I learned pretty quickly that I had to follow the direction and instructions of my boss in order to learn HOW to be good at sales.

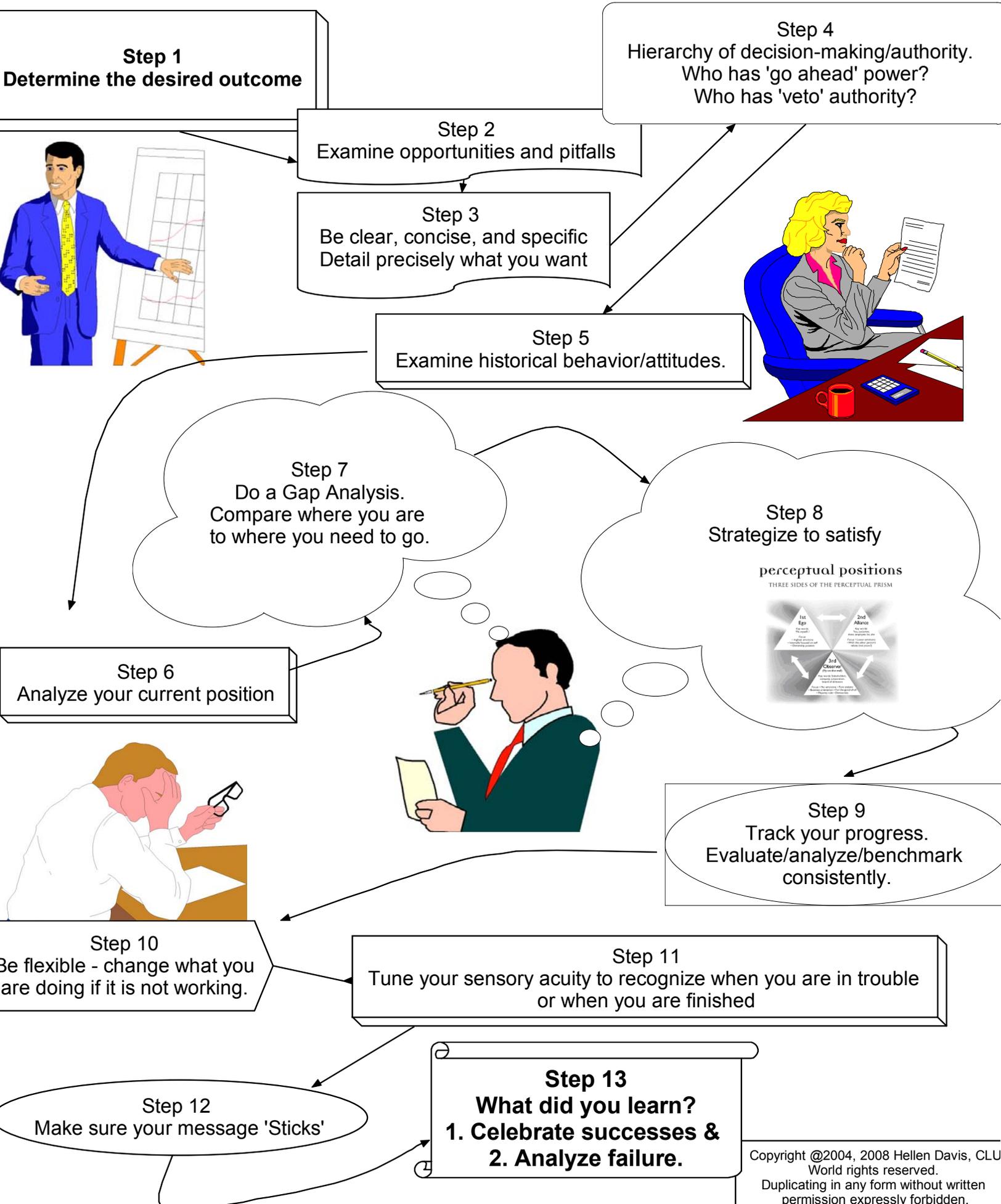
The best lesson that I learned was of the power that influence (the ability to persuade someone to share my viewpoint) had over the entire sales process. It was then that I realized that influencing other people in and of itself was a process! I looked at my sales approach and discovered that I would take specific steps to influence my clients to purchase their insurance policies from me. The psychology of human behavior holds that there are certain ways that people act or react to and in certain situations. With that knowledge I was always a step ahead of my clients, because I would know what to say or do to either support their decision or counteract their objection to my goal. When asked by friends and co-workers alike how I did so well in sales, I would always tell them that it was all about "influence". They would smile and say to me that if what I had could be bottled up and sold then they would be the first in line to buy it!

Once you have a basic understanding of how the influencing process works, then your ability to apply and/or understand the Laws of Influence will increase dramatically. By applying the steps in the influencing process to a goal that you want to achieve, you have developed a clear strategy to reaching your goal. Would you drive to a restaurant you had never been to before without getting directions? Only if it didn't matter what time you got there or even if you got there at all! However, if you wanted to get there on time and with as little stress as possible, you likely would check out a map, plan the best route for getting there, and write down the directions, before heading off. Now, if you would take these steps just to get to a restaurant, isn't it worth it to put in the same effort towards achieving the truly significant goals in your life? Just as there is a "process" to getting from one location to another, there is a "process" to most effectively getting what you want out of life.

The influencing process can be applied to any goals that you might want to achieve -- from convincing a client to buy your product, persuading the CEO to implement a new policy in the workplace, getting a raise at work, encouraging the kids to do their homework... Once the process is clear, all that is left for you to do is apply your new knowledge of influence to your goals.

**You make up your mind before you start that sacrifice is part of the package.
M. DeVOS**

The Influencing Process Flowchart



STEP 1 - DETERMINE THE DESIRED OUTCOME.

The first step is simple. Decide what your goal is and write it down.* Writing your goal down makes what you hope to achieve more concrete, and serves as a reminder down the line to refocus you on your goal. As you go through the influencing process, your goal needs to be kept in the forefront of your mind. This will help to keep you on track. At each step throughout the influencing process, it is helpful to review your goal in your head.

Once you have identified your goal, look at it from a “perfect world view”. Write down what you ideally see happening, what a perfect outcome of your goal being achieved looks like. If your goal was to sell your product to a new customer, then your perfect worldview might include - getting a referral from that client, a commitment from that person to make you their sole supplier or the receipt of praise and recognition at the office for being a superb salesperson. Whatever it is that you would like to see result from your goal being reached, write it down.

After you have done this, analyze the probability of your goal resulting in the desired way. This will help you to realize if the goal you set is realistic, necessary and important at the present moment, and even achievable at this point in time.

*It is entirely possible that your goals will change because of circumstances beyond your control. This is an important fact to know from the beginning. It is totally acceptable for your goal to change with a good reason. If this does occur and you set a new goal, write down the new goal just as you did with the first one.

STEP 2 - EXAMINE OPPORTUNITIES AND PITFALLS FROM ALL VIEWPOINTS.

The second step of the influencing process requires you to look at the costs and benefits from the viewpoints of all parties involved. It is essential that you look beyond yourself and focus on the opportunities and pitfalls from the perspective of the person/people you are trying to persuade. If you concentrate solely on your goal and getting what you want, without taking into account the other person then you risk reaching your goal. Who would be influenced by someone who doesn't focus on anyone but themselves? You need to be able to relate with the person you are attempting to influence. This rapport (ability to relate with a person) can best be attained by putting yourself into the other person's situation to better understand where they are coming from. If you don't know where they are coming from, how will you know what will influence them?

Different people are influenced by different things – hence there are twenty-one and not just one law of influence. Be sensitive to what the other parties' goals are and you are that much closer to getting your own goals achieved.

Ask these questions to determine the opportunities and pitfalls of your goal for yourself and the other person/people involved. Reducing risk, maintaining long-term relationships and increasing profitability should always be considered.

For yourself:

What opportunities could arise from my attempt to influence this person?
What pitfalls could I encounter if I attempt to influence this person?

For the other person/people:

What will they gain from what I am offering to them?
What do they stand to lose by my offer?

What you may gain or lose is obviously going to be very different from what the other party stands to gain or lose. If we are talking about a product, when the client makes a purchase the influencer gains a sale and a client (goals achieved!!), and the client gains a product but loses some money. The product (the client's gain) has to be seen as being more valuable than money in pocket (their loss) to the customer.

There are times when you will need to decide if the work necessary to persuade someone to change their mind is really worth the battle. Rarely in negotiations is it a win/win for both parties. It can take a lot of hard work to convince someone to see things in a different light. If it would require you to focus all of your energy, time and effort on just one person in order to achieve your goal, then you might want to evaluate if the goal is one that you want to continue to pursue. What are you giving up to achieve this goal? If you are relinquishing a pre-established client base to acquire a new and seemingly resistant customer then a new goal might be called for. The loss of 10 clients cannot justify the gain of one!

STEP 3 - BE CLEAR, CONCISE, AND SPECIFIC ABOUT THE DETAILS OF THE OUTCOME.

Once you have evaluated what everyone involved in the influencing situation stands to gain or lose throughout the process, you need to write down in detail what you see resulting from your goal being successfully reached. Since we previously addressed the sale of a product we can use that example. If your goal is to sell a product to a new customer, what does that look like? It looks like more than you handing over a product and the client handing over the money. Or if it doesn't look like more than that, then your repeat business with that customer is likely to be nil.

Before you can reach the successful outcome of your goal you have to know what that looks like! And you have to be complete. Your goal is dependent on the satisfaction of the person influenced. If they are not satisfied then you likely will not get what you want.

Be sure to address all aspects necessary to convince them that your goal is something that will benefit them. Ask yourself:

What is your relationship like with the client – are they a one time buyer or will you establish a bond with them that turns into a working relationship?

What will you need to do to earn their business?

What expectations do they have of working with you?

When do they expect the product to be delivered? And when can you deliver it?

Is the product under warranty? What is the return policy?

When is payment for the product due? What type of payment is accepted?

It might be helpful for you to ask yourself “Okay, for me to influence this person what do I need to do and know?” Once again put yourself in the position of the person you want to influence. For example, if someone were to approach me about buying a TV – what would I want to know? What would this person have to do or say to convince me that their television is better than the one I already have? These types of questions have to be addressed in the beginning of the influence process. If they are not you will not be prepared to effectively answer their questions or counter their objections.

STEP 4 - DETERMINE THE HIERARCHY OF DECISION-MAKING AND AUTHORITY.

Whenever you are attempting to influence someone, you must keep in mind that often times the viewpoints and opinions of many people (both seen and unseen) have to be considered. In an influencing situation you are usually responsible for persuading more than just one individual about your goal. You must take into account the people who have veto power and clout over your proposition. They are the ones who can either help you to reach success or can put an end to your objective being met.

At this step in the influencing process it is assumed that you have established a comfortable level of rapport with the person and feel confident that they support your objectives. However, in order to ensure that your progress towards goal completion continues, you need to discuss with them who else they think needs to be informed and educated about the decision and what the best approach to doing that is. In other words you need to have your client help you to plan out how to influence the people who can make the final decision regarding your goal. Or, if the client him/herself is the one with the most power then you need to determine what s/he might say to talk him/herself out of the decision they made.

Don't waste your time trying to convince someone who has already been convinced, if they don't have the power to help you get your goal accomplished. It will do you no good if you convince your friend to buy your old car when his wife (who IS the final decision maker in these matters) wants a new car. The only possible way for you to sell your car to your friend and his wife would be if you were to convince HER that it would be a good investment for them. You can tell your friend a hundred times over how great the car is and how perfect it would be for him, but you are wasting your breath because he doesn't have the authority to buy the car. Don't waste your energy on the wrong people and be certain not to offend the right people – either action can result in a dead end!

STEP 5- EXAMINE HISTORICAL BEHAVIOR AND ATTITUDES.

Once you have discovered who has the most power over the decision-making, then your job is to uncover how this person feels about the specific goal that you are attempting to achieve. Look at their typical behavior when they have encountered your topic in the past. Was their attitude positive or negative? Did their viewpoint support or reject the idea, concept or product? You can gather this information from a variety of sources – individuals who work with the decision-maker (be cautious of whom you request information from), your contact (if it is not the person with the decision-making power) i.e. How has Mr. Jones responded to this sort of proposal in the past? Utilize any resources that you can to understand the perspective that “Mr. Jones” has regarding your goal. This information will help you prepare a strategy to convince the decision-maker to see things from your viewpoint.

If you do not take this step you risk going into this phase of the influencing process essentially “un-armed”. The chances for failure are greater than those for success, because you have no idea what approach will work successfully with the decision-maker. If they already support your idea and you go in with an overaggressive approach – your idea could be nixed based on approach alone! OR if you are meeting with a person who is a stickler for detail and you take a laid back, unassertive approach you could be seen as not being serious about your goal and thus not the type of person they want to do business with. They certainly are not going to be influenced by the type of person who does not emanate characteristics that they respect. Your ability to persuade them to see your viewpoint would be gone, because you did not take the time to research WHO they are.

STEP 6 - ANALYZE YOUR CURRENT / PRESENT STATE.

Now that you have collected more information on the target of your influence, you need to step back and take a clear look at how to proceed to most effectively accomplish your goal. You need to identify two things – where you are and where the other person is in the influencing process.

First, where are you today? What is your understanding of your outcome – has the goal changed at all? Do the opportunities and pitfalls that you may encounter balance one another out – is it worth it to continue to pursue the goal that you initially established? Have you been specific about both the steps you will take to reach your goal as well as what the accomplished goal looks like? What will the person influenced receive and or have to do? What will you receive and or have to do? Have you gathered enough information about the person you need to influence to be able to successfully do so? Do you know their opinion on your topic and how to persuade them to see things from your viewpoint?

The second thing that you need to assess is where each of the individuals that you are attempting to influence is in the process. You need to figure out what their opinion of your product, viewpoint, idea etc. is. You can discover this through many means; observation of their body language, by watching their response when the topic is discussed, by soliciting the opinions of others who know the person being influenced well. Depending on the type of relationship you have developed with the person in the power seat, it is possible that you even just ask them outright “What is your current feeling on what I have shared with you today?”

When looking where you and the other person (people) are today, be certain that you are looking at the situation from as close to reality as possible. This step of the process should be analyzed without rose-colored glasses. Don't make any assumptions.

It is also important to analyze the degree of trust between parties. Do you need to establish a greater degree of trust before you can convince the person? If so, how can/do you accomplish this? This stage of the influencing process can be used to assess the work that still needs to be done on your part to successfully reach your outcome.

STEP 7- DO A GAP ANALYSIS.

A Gap analysis is when you simply use the information that you gathered in the previous step to compare where the person is today regarding your topic, and where you need them to be to help you satisfy your outcome. You are essentially identifying the 'gap' that needs to be closed for your goal to be achieved as you intended. Often one of two things is revealed at this point in time.

First, you could find that you and the person you are trying to influence have established a strong degree of trust. Your level of rapport is at a peak and the likelihood of your goal coming to fruition is great. People are more inclined to help others to get their goals achieved if they see them to be similar to themselves and trust them. The focus now is to maintain the relationship and continuing following the steps of the influencing process to ensure success.

On the other hand, this stage of the influencing process could also indicate to you that the gap that exists is either too large to close in the time period required OR that a different approach needs to be taken to create the level of rapport and trust that is currently lacking, but necessary to get your goals achieved. Your initial goal may need to be modified if the current situation is not meeting your expectations of where you need to be at this phase in the process, or if it seems that your goal is unrealistic due to circumstances beyond your control.

If you skip doing a Gap analysis, you risk failure because you won't have appropriately assessed how far along in the influencing process (how close to being convinced and seeing your perspective) the person you are trying to influence is. Look at it like this, if you are out for a jog and see a stream up ahead, you likely would tell yourself "If I want to get to the other side to continue on this route then I will have to jump over it." You also may tell yourself " If I want to get over the stream without getting wet and having to run along for another half an hour with wet shoes, then I had better know how wide the stream is before I attempt to jump over it!"

At this point in time it is required for you to slow down your jog so that you can appropriately assess the "gap" in the land that is filled with water. To just keep on your course, with no change in pace to allow you to assess the width of the stream - you have no idea how much energy and force your body will need to use to successfully jump over the stream. The chances that you either underestimate or overestimate how far you need to jump increase. You risk either hurting yourself through overextension, or getting soaked and having a less than enjoyable run home. To neglect doing a gap analysis when attempting to influence someone you put your desired outcome at risk.

STEP 8 - MAP OUT THE STRATEGY TO SATISFY ALL PERCEPTUAL POSITIONS WHENEVER POSSIBLE.

You have set a goal – complete with its possible costs and benefits – and defined what the completion of the goal will look like for all parties involved. You have gathered data about the decision-makers, identified their opinion (past and current) on the topic of your goal, and have examined how closely their perspective matches yours. The next step is to put all of your research into play and create a strategy to achieve your goal while affording the most benefits possible to all parties involved.

Identify how the achievement of your goal will benefit the person you are attempting to influence. What will they gain by seeing things from your perspective? What will they need to do to help you move closer to your goal and how can you make that as easy as possible for them? For example, if your goal is to get a referral from the aforementioned new customer, explain how both they and their referral will benefit if your client gives you their name. You cannot just say to your client, “If you give me a referral it will help me to establish my client base” because your client’s concerns probably aren’t about your client base! Your client would be more inclined to provide you with a name if you make a request for it based on the fact that you simply want your client’s referral to have the same opportunity as that of your client.

For example, “Wouldn’t it be great if you could go out and play tennis with your brother because he just purchased the same tennis racket that you did? Then you both could spend time together, while you release tension from the workday and get a great workout!” By proposing an idea that makes logical sense in the mind of your customer and is appealing because of what it means for them (family time, release of stress, exercise) you set the stage for completing your goal.

This strategy phase of the influencing process is where using the 21 Laws of Influence is essential. You will need to choose which law(s) would best help you to achieve your goal. Make certain that the laws that you implement help to satisfy the needs of your “target”. If their needs are being met, or will be met, through the action that you are asking them to take, then they will be more willing to see things from your perspective.

Build a verbal battle plan based on the 21 laws of influence. Use your research to determine which laws would work best on the people you want to influence. As mentioned before, different people are influenced by different things. You need to modify your strategy to reflect the personality and values of the person you are approaching. Never forget to analyze the perceptual viewpoints of all people with power over the final decisions that are made. Show them how they will benefit by adopting your perspective.

Be prepared for yellow flags and potential stoppers. These are the unexpected things that have the potential to alter the progress that you had been making towards your goal. If you can foresee a potential stopper or yellow flag then work it into your strategy from the beginning. Identify what it is and how you can work around it. What can you say or do so that this potential blocker does not influence your target? How can you use the influencing laws to overpower or negate the obstacle that threatens to arise between you and your objective?

Here is an example, a couple enters a sporting goods store and you approach them to try to make a sale to the man, who had been admiring the tennis rackets. Some quick research indicates that a major decision-maker (the customer's wife) is not too keen on the idea. This customer's wife is a "potential blocker" to your cause and must be considered when attempting to influence. You must work into your strategy how the purchase of a new tennis racket will benefit her.

"Look at what you get if your husband decides to purchase this racket! You can use it when he is not playing and get the same benefits that he does - spending time with someone you enjoy playing with, releasing stress and getting fit! Picking up a new hobby like tennis also means that you will have some quiet time (that is so hard to find these days) when your husband is off playing! You can also get a tennis racket for much less than you can a membership to the gym and can use it right in your driveway or at one of the free tennis courts in the area. Saving money and time and increasing my health are all important to me, how about you? "

By working a prospective blocker or stopper into your strategy, you are prepared to overcome objections from the beginning rather than being required think on the spot and jeopardize your goal's success.

STEP 9 - EVALUATE AND BENCHMARK CONSISTENTLY TO ENSURE YOUR GOAL TRACKING PROGRESS.

The concept behind this stage of the influencing process is simple – measure what has been accomplished so far to identify how far along you have come, as well as how far you have to go to reach your goal. The difficult part of this step is often figuring out how to go about doing this. How will you determine/measure your progress? How will others evaluate your progress?

If you had a goal to measure the speed of snow falling over the course of one day, how would you go about tracking your progress? You would need to determine first how you wanted to measure the snow – are your measurements going to be in inches, centimeters, cups? Then you would select the tools needed to gather the data. Assuming you wanted to measure the snowfall in inches you would need to have a ruler or yardstick to accomplish this. You would need to decide the intervals at which you wanted to take measurements of the snow and do just that at the times you had specified (let's say you chose to do it on an hourly basis). You would go out each hour – starting one hour after the snowfall began – until the snow stopped falling. Every hour you would place your yardstick into the ground and record the height of the snow. You would record the difference between the current and previous hour to see how much snow had fallen. If you skipped an hour or two throughout the day you would be able to get a fairly accurate rate of the snowfall, but you could not be precise in the measurements. Your conclusion as to the rate of snow falling therefore is inaccurate. The point is that you need to assess which parts of your strategy in reaching your goal have been completed and which points still need to be addressed. A review of how the influencing process is moving along for you will help you to realize what still needs to be attended to, to help you move closer to your goal.

This step can almost be renamed the “Have you done everything on your checklist” step.
Ask yourself:

Has my prospect changed his/her perspective on my topic?

If NO has s/he moved any closer to it?

Is there conversation that suggests commitment to my goal? Is there talk of a future together?

Have I established rapport with prospect?

Have I shared the benefits of my goal (for them) with my prospect?

Do others see positive change (movement towards the goal) in the attitude of the person being influenced?

How will other people evaluate your progress? This is a question that is very important to address because the observation of others will contribute to your ability to influence them. Other people will look to see if promises were kept and if you can be trusted regarding your commitments. While working towards your goal you may be required to do things for others as a part of the influencing process. Do you follow through with the things you committed to do or was it just talk to convince someone of something? If you do not follow through on your word, your level of credibility will decrease dramatically and this can negatively influence your prospect's final decision on whether or not to help you reach your goal.

STEP 10 - HAVE THE BEHAVIORAL FLEXIBILITY TO CHANGE WHAT YOU ARE DOING IF IT IS NOT WORKING.

There are different ways to communicate with and influence people. If the approach that you have been using to convince someone is not working – then it makes sense to conclude that a continuation of that approach will lead you nowhere. While that seems to be an obvious and logical statement, you would be surprised at how many people continue to use the same method (that has not been working) to try and get their goals met!

You must be able to evaluate if the approach that you are taking is effective and moving you closer towards your goal. If it is not, then you need to stop what you are doing and create a new strategy to use to influence your target.

The first part of this step talks about behavioral flexibility and change. Human behavior is only partially predictable. While there are common actions and reactions by humans, when certain things in life happen to people, there are always underlying or unexpected circumstances that can come into play. This means that you have to be sensitive to (aware of) the behavior of the person/people that you are attempting to influence. It is necessary to establish rapport and trust when trying to influence – your job is to determine the best way to accomplish that with different individuals. This may require that you change your typical communication approach. This is not an easy thing to do if you are used to interacting with people in a standard “one way fits all” mode of communication. You may believe that with constant repetition that the person will come to see things from your perspective. Not likely! There is a greater chance that they will become irritated by your approach and put an end to the conversation (and your goal) right then and there! You are better off to pull back – do some more research and try using a different law to influence the person.*

* This pointer is necessary when you are trying to influence two different people. If you have been thorough in your research, you should have a fairly clear idea as to what appeals to the decision-maker, and what law would most likely convince them to share your viewpoint. If for some reason the approach that you thought would work does not, then try a different approach!

The second part of this step contains the words “is not working”. You have to be able to realistically assess if your approach is working and if you are moving your target closer to your goal. Pay attention to their body language and verbiage – do they look excited and involved in what you are saying or is there a frown on their face and do they keep looking at the clock? Are they using words that would lead you to believe that they are moving closer to agreeing with you? Or does it look as though the words ‘no’ or ‘don’t’ are about to roll off of their tongue? Since the focus is on accomplishing your goal, the word COMPROMISE needs to be center stage. Can you compromise your approach? Can you be flexible with the terms of your goal? Don’t accept less than what you truly believe you need/deserve/want, but be realistic and compromise if there is space for it.

STEP 11 - TUNE YOUR SENSORY ACUITY SO THAT YOU IMMEDIATELY REALIZE THE MOMENT YOU REACH YOUR DESIRED OUTCOMES DURING THE INFLUENCING PROCESS.

Sensory acuity addresses the skill that one has in correctly reading body language. To effectively read body language, you must use your primary senses and fine-tune your ability to ascertain what various postures and gestures mean. You will rely on your sensory acuity a lot during the influencing process. People use their body language to express those things that they are not saying aloud. Those 'things' can refer to either a connection between people, or distaste for something someone has said or for an idea or even of a person or place. Body language is used to establish rapport and trust. If you cannot read body language, then how can you utilize it to create these two essential ingredients in influencing someone?

Be certain that you act appropriately and congruently according to your plan. Don't get caught up in what you "could" get beyond what your initial goal was. If you push too far beyond your desired outcome, you risk offending the person and being seen as being too aggressive. You don't want to be like the little child who asks, " Mom, can I have a cookie?" and is given permission to have one. On the way to the cookie jar, the child feeling lucky – and of course oblivious to the fact that his mom was stressed out - decides to ask, "Mom how about, TWO cookies? She of course being short on patience at that moment responds "How about NO cookies?" The child then realizes that he has jeopardized his chance for a treat at all and that he should have just asked for the initial cookie.

Identify when people see your point of view and stop trying to convince them! Note: Too many people talk too long! In sales, recognize a buying signal and then close your prospect. When managing people, be able to identify when your people grasp the meaning of your words and stop talking!

STEP 12 - REHEARSE TO ENSURE 'STICKINESS'¹

Future Pacing and on-going buy-in are concepts that ensure that people stay on track after the influencing goal has been achieved. Once you have successfully persuaded someone to see your perspective on something, you need to follow up on the goal to make certain that all commitments are kept and that all services are provided and accounted for. Beyond just influencing the person to see your viewpoint, you need to influence them enough so that **they** can influence others to see your (and now their) way of thinking. If you cannot influence them to a degree where they will not be swayed to reject their new viewpoint – then all your effort and work was for nothing.

There are times when a decision has been made and agreed upon and you and the person you have influenced leave and go your separate ways. You get to work the next day to find an email from them saying that they changed their mind. They write that while your viewpoint is good and they do agree with it, that they cannot help you to achieve your goal at this point in time.

What happened overnight to change the person's decision? It could have been a partner, parent, child, personal experience that changed their mind and their viewpoint away from yours. To avoid this, you would do best to discuss any potential factors that might influence the prospect to deviate from the plan. Brainstorm the scenarios that could emerge and then rehearse what your prospect will do if something causes them to feel reluctant to carry out the actions you both agreed were necessary for the goal.

¹ Malcolm Gladwell coined the phrase and detailed the importance of 'stickiness' in The Tipping Point. Stickiness is a critical component in tipping. "Unless you remember what I tell you, why would you ever change your behavior or buy my product?" Stickiness refers to the "memorability" of a message. This can be achieved through both the presentation and structure of the information. **A message is influenced by both the content and the messenger.**

STEP 13 - CELEBRATE SUCCESSES AND ANALYZE FAILURE.

This is the final phase of the influencing process. It is not to be skipped because a review of your actions and the outcomes throughout the process serve to help you in future influencing attempts. Begin this phase by looking back at the original goal and where you began. Asking a series of questions can better help to analyze your experience with the influencing process.

In hindsight, what would you have done differently?

Did the initial goal stay in tact or was it altered?

Did you successfully identify all of the pitfalls and opportunities of your goal and which of them have come to fruition?

Did anything unexpected occur?

Did you experience any difficulty with any of the steps of the influencing process? If so which steps?

How specifically were you met with success in the influencing process?

How specifically were you met with failure during the influencing process?

What skills do you need to improve upon to be more effective during the influencing process?

How did you grow through the experience?

How did you enhance your relationship with others?

How did you make the company better?
