



TRANSCRIPT

Episode # 7: Creating Momentum With A Persuasion Campaign

Hi, everyone! You know, world-class persuaders don't just rely on their presenting and debating skills. They think about persuasion as if it were a campaign in and of itself.... a campaign to make it easy for others to understand the value of their ideas.

Like any good campaign, that means taking the time to plan and prepare. If you've been working on your influencing skills all along, you may not need a lot of preparation time. You've already done a lot to build productive relationships. But investing a little more time to prepare for your pitch can still increase the odds of winning approval for your idea.

Today, we'll go over a good preparation checklist that will help you increase the chances of winning acceptance for your idea. Some of these things are

just plain common sense. But the use of a checklist also helps ensure you don't overlook critical preparation when you're busy and moving fast.

But before I do, let me share a story from my past that.... well, let's just say it didn't go so well at first! I think it shows pretty clearly the risks that can happen when you don't put a persuasion campaign in place before pitching your idea.

This was back in the 90's, and I had recently joined a very large company that didn't have someone at the corporate level to oversee environmental, safety and health issues. Now this wasn't necessarily as bad as it sounds. There were ESH staff at the divisional levels, and the company had a good track record of taking the high road and always doing the responsible thing. Their culture was very good in that way.

However, as we now know decades later, not having an enterprise-wide resource to oversee these issues is risky for all sorts of reasons, regardless of how responsible the company is. And this was especially true given the industry that we were in.

So, I pointed this out to my boss who was on the management team, and he agreed. He asked me to put together a case for creating a new position at the

corporate level, and I put together a rock-solid presentation. I explained the risks and the reasoning, provided information on practices at competitors, proposed a job description, and even discussed why such a position would enhance our already strong brand.

My boss took the presentation and pitched the idea at the next management team meeting. He was normally a pretty persuasive guy with a lot of credibility, so I was sure it was a done deal.

Until it wasn't.

My boss returned from the meeting, and said "Sorry, Kathy. They didn't go for it." I asked him to explain why, and all he could do is provide a bunch of comments from other members of management that really didn't add up and make a lot of sense to me.

I was left scratching my head and wondering what to do next. And that was an important question, because we now not only had an unmanaged risk on our hands, but also, we also had evidence that management had rejected the opportunity to address that risk.

Now later on in this episode, I'll tell you how it all turned out, but I bet a lot of you can see that I had overlooked certain things in how I managed this. I could have just blamed the management team or come to the conclusion that my boss was more ineffective than I had realized.

But in fact, I came to understand that I was the one who had failed to prepare adequately for pitching this idea. I had failed to think of persuasion as a campaign. I had just seen it as a single event.... the presentation to the management team.

So, let's make sure that doesn't happen to you. I'm going to give you a preparation checklist that will help you create the momentum you need to win approval for your ideas.

In other words, you want to go into your presentations already having tipped the balance in your favor. You may not always win, of course, but you do want to know that you did your best in preparing.

The first thing that you should have on your preparation checklist is to assess your environment.

#1: ASSESS YOUR ENVIRONMENT

At any given time, there's a lot happening in the workplace environment, and those circumstances can either work for us or against us. The first part of your preparation should be to assess what you're dealing with, so you can make wise choices about next steps.

For example, who are the key decision makers? What motivates them, and what are their hot buttons? That can tell you how best to appeal to their preferences and likewise what you might want to avoid in your pitch.

And what is their current mood? If they're dealing with a looming challenge or a worrisome personal issue, this might not be the best time to approach them. I know that may sound obvious, but, you know, I'm always surprised to hear that a client is planning to make a pitch to his or her CEO right before a board meeting or just after news of a business downturn.

We'd all agree that's when the CEO is most likely to be distracted or stressed out. Yet when you're busy, goal-oriented and focused what's on your own plate, it can be easy to overlook the obvious. Make sure you're assessing the frame of mind of decision makers before you make your pitch.

Other things to assess in your environment include the politics that are going on among key decision makers; their personal preferences; or a particular business or organizational project that may be on their minds. These are all factors that can tell you what to link to in your pitch or maybe what to avoid.

For example, if I know that a decision maker might be risk-averse or conflict-averse in his or her preferences, I might show in my pitch how my idea lessens risk or conflict.

Or if I know if a decision maker has a hot button about ideas that aren't pragmatic, I might not emphasize why my idea is conceptually strong (even if it is) and instead I would focus on the positive business results the idea has actually delivered for other organizations.

#2. TEST YOUR ASSUMPTIONS

Once you've done some preliminary assessments of the environment and determined what's going on that may help you or hinder you in making your pitch, you're ready to learn more about how people will react to your idea.

Remember, you're still in the exploring stage of your campaign. Your primary goal when you test your assumptions is not to pitch or to defend your idea. Instead, you simply want to see where you have support or opposition and also to learn more about why people support or oppose the idea. You're gathering information so that you can design your campaign well.

So, what frame of mind do you need have at this stage? You need to commit to openness and curiosity. My favorite approach here is to start with a desired outcome, and then float the idea as a trial balloon.

So, for example, if I were in HR, I might refer to the fact that if the organization became even more agile, we could consistently stay ahead of the competition.

Then, I might ask, "What do you think will build more of that agility in our organization? Would investing more in development programs be a good idea? I'm thinking that could be helpful because of X, Y, and Z. What do you think?"

You then enter into a dialogue and see where the conversation takes you. You want to fully explore that person's thoughts and feelings. Notice that I said feelings as well as thoughts.

As I mentioned in Episode 4 of this podcast, understanding the feelings of key decision makers can be useful info for you.

Just because this is an open conversation, however, doesn't mean that you don't have some specific goals. I usually want to identify the one main thing that worries the person about my idea and the one main thing they like.

That's going to help me develop the perfect approach to the pitch I make later on, and I specifically ask those questions if I haven't already picked up that info in the dialogue.

For example, if the person is generally in favor of my idea, I might ask "What's the one thing you think might be an obstacle to this?" Or if the person is somewhat dubious about my idea, I might ask "What's the one thing that would make this workable or worthwhile?"

I'm sure you immediately see what is really happening in these conversations. I'm building connection in advance of my pitch, and I'm gathering valuable ammunition so that when I make my pitch, I'm as close to bullet-proof as I can get.

#3: DEFUSE THE OPPOSITION

Once you've tested some of your assumptions, you're now in a better place to identify who might oppose your idea and for what reasons.

You could simply stop here and start planning out how you're going to approach the formal pitch for your idea. But there's yet another step that you can take to smooth the way for yourself. That's by dialing down the anticipated opposition ahead of time, so you don't have to rely on your formal pitch itself to do all the heavy lifting for you.

How do you defuse opposition? One way is to use other people and the other is to do it yourself. The last one is my favorite, and I'll explain why in a minute. But first let's talk about using other people.

Getting other people to help you defuse opposition is a time-honored approach in the workplace. If Tom is not a fan of your idea, but respects the opinion of Angela, then you can ask Angela to speak to Tom on your behalf.

So, this approach can definitely work, but it also can occasionally backfire.

Sometimes Tom sees this intervention as manipulative or an attempt to pull rank,

and you lose credibility with him. So, I would carefully think through the pros and cons before going this route.

Much better is to go back to Tom yourself. Your excuse for going back is to suggest a potential solution, and you say something like this:

“When we were talking about investing in more development for employees, you raised a concern about X. I’ve been spending some time thinking about that, and I think I have an idea about how to alleviate your concern. How would you feel if we did X, but we did it in this way vs the way we were originally discussing?”

So clearly if you can persuade Tom to shift his thinking ahead of your formal pitch, you’re in much better shape. But interestingly enough, you’re also in better shape even if Tom doesn’t change his mind.

Why is that? You’ve been demonstrating to Tom fair-mindedness and collaboration in a way that almost always will lessen the intensity of his opposition at the formal pitch. And when you’ve lessened an opponent’s intensity, then you’ve also lessened their ability to sway other people at the formal pitch.

That's why I almost always prefer this method when I'm preparing to advocate for an idea vs having someone else speak up on my behalf. I'm strengthening the connection between myself and the person who opposes me, and stronger connections always have a way of smoothing your path forward.

So, the 4th thing on your persuasion campaign checklist is to...

#4: RALLY YOUR POSSE

Now, at the risk of contradicting myself, you do want to use certain people during your prep to help you out, and those people are your posse. What do I mean by your posse?

Well, "posse" is the word I use to describe a certain type of work friend. Your posse are the people with whom you share some common beliefs and objectives about the direction the organization should be going in.

They often are scattered around the organization at different levels, which is a good thing. That's because they serve as an information channel, alerting you to

valuable information and serving to get your message out more broadly in the organization. They have your back, in other words, and you have theirs.

In the future, I'll be doing a whole podcast episode on the concept of a posse--- what it is, how to cultivate those relationships, and how to support each other so everyone succeeds.

Creating a posse is an advanced influencing skill, and it's a powerful one. But for now, just think of your posse as work friends who share your interests and support your goals.

Your posse can be important to you in several ways when you're preparing to advocate for an idea. First, they can help you assess possible supporters or opponents elsewhere in the organization so that you know more about how key decision makers think, and then factor that into your pitch.

And secondly, in advance of your formal pitch, your posse can seed your idea to others who you might not be connected with. Now I'm not really contradicting myself here. Notice that I didn't say they should actively advocate for your idea.

I'm always a little wary of that. I personally believe that no one else can ever advocate for your own idea as compellingly as you can. So, I don't particularly like relying on others to make the pitch for me.

But your posse can point out to their own networks the value to the company of the outcomes that your idea will produce. And they can also let others know that you have some good ideas as to how to get there. In other words, your posse can prime the pump and get your audience ready for you.

They're an effective way of enhancing your credibility with people who may not yet know you well but who nonetheless may have a voice in approving or vetoing your idea.

So, there you have it.... four steps to take that help smooth the path for your pitch and that enable you to collect all the ingredients you need to put together a persuasive argument.

So, let's go back to that time earlier in my career where I struck out in convincing the management team that they needed an enterprise-wide role for managing environmental, safety and health issues. How did I recover from that?

Well, I did what I should have done before the pitch to management team. I sat down and realized that I hadn't assessed the environment.

I hadn't tested my assumptions or floated any trial balloons, and I really hadn't learned much about any of the concerns that other members of the management team might have had about this new idea.

I just figured that if any of that was necessary, my boss would be doing it. I was acting passively rather than empowering myself.

So, I decided to go to each member of the management team and just be honestly curious about where they were at on this. I explained the value of the idea, but I also invited them to poke holes in it so I could learn how I could make the idea better.

And once I learned about each of their concerns, I went back to the drawing board and did a new version of the pitch, one that addressed any concerns they had about role clarity and accountability.

I then took the new proposal back to each and every one of them and asked "What do you think about this approach? Does it meet all your concerns?"

In other words, I made it easy for them to see the value of the idea. I had taken it from conceptual to something that was more clearly and tangibly beneficial.

I ended up with unanimous approval for the new role at the next management meeting, and I had gained more as well. Talking to the management team members in the way that I had done ended up building stronger relationships. I had earned greater trust and credibility in their eyes.

But perhaps the biggest reward of having this experience was the learning that I gained. Never again in my career did I fail to think through what my persuasion campaign would be when I had to pitch a new idea.

As a result, by the time I got to the presentation stage, I had at least evened the playing field and my win rate started to increase over time. Hopefully that will be the same experience for you as you use this checklist and develop your own persuasion campaigns.

Alright, my friends--have a great week ahead, and I'll see you in our next episode!

We're celebrating the launch of the podcast here, and I'd like to include you.

I'm going to be giving away AirPods Pro to five lucky listeners who follow, rate, and review the show. Now, of course, you don't have to give the show five stars, although that would be awesome and I do hope you love what you've heard so far. But I'd also love your honest opinion and feedback as well as your questions so I can create a show that's a valuable resource for you.

So visit significagroup.com/podcastlaunch to learn more about the contest and how to enter and I'll be announcing the winners on the show in an upcoming episode.

Thanks for listening to this episode of Mastering The Power Skills. If you like what was offered in today's show and want more insights and resources from Kathy, check us out at www.significagroup.com.