

# **The Magic Formula Checklist:**

**A Step-by-Step Guide To Getting Better Results With Less Friction**

**What is the magic formula?**

**Clear Expectations + Firm Accountability =**

**Better Results With Less Friction**

## Preparation Checklist for the Conversation

*Get clear on the answers to these questions before having your conversation.*

Questions	Your Notes
<p><b>1. What outcome do I want?</b>  <i>What will the beneficial result be if the person accomplishes what you want them to do? How will work life be better or easier? What strategic goals will this help? Try to become conscious of the entire context surrounding this issue.</i></p>	
<p><b>2. What are some of the actions I want done?</b>  <i>These actions are probably the first things that come to mind. Sometimes you'll know every action that you want the person to take. Other times, if you're kicking off a big project, you will know the initial actions but still don't have clarity on the later actions. That's OK—just try to be as complete in your list of actions as you can at this initial stage.</i></p>	

### **3. What are your “conditions of satisfaction”?**

*This is where most people trip up. They fail to specify all the items that are relevant to getting the job done well, and they assume the other person shares their perspective and is seeing all those relevant things.*

*Examples of relevant conditions of satisfaction include:*

- *Time frame*
- *Priority vs other projects*
- *Method of performing*
- *Behavior and attitude*
- *Reporting and follow-up timeline*
- *Who needs to be involved or kept in the loop*
- *What needs to be avoided (in other words, what could inadvertently go wrong, like offending a key decision-maker or having an adverse impact on another important project)*

### **Your Notes**

	<b>Your Notes</b>
<p><b>4. What might motivate this person to perform these actions?</b></p> <p><i>To be motivated, the person needs to see a future gain. This can be a gain to themselves (the most persuasive), a gain to others or to the organization, and/or a gain to you (important to acknowledge but the least persuasive).</i></p> <p><i>Examples of possible gains to the person you're asking:</i></p> <ul style="list-style-type: none"><li>▪ <i>Career ambitions</i></li><li>▪ <i>Eliminations of workplace problems that currently bother them</i></li><li>▪ <i>The chance to be seen publicly in a positive light ("You'll look like a hero")</i></li></ul>	
<p><b>5. What promises am I willing to make to this person?</b></p> <p><i>Promises are a highly persuasive way of moving people into action.</i></p> <p><i>Examples include:</i></p> <ul style="list-style-type: none"><li>▪ <i>The promise of support and resources</i></li><li>▪ <i>Your willingness to discuss alternative ways of fulfilling your request</i></li><li>▪ <i>Your support in fulfilling a different request the other person may have (quid pro quo)</i></li></ul>	

## Your Script for the Conversation

*Establishing clear expectations and good accountability*

*depends on including each one of these sections in your conversation.*

What To Say	Your Notes
<p><b>1. Connect</b> <i>Tell the person what you appreciate about them and why you're asking them to do something.</i></p>	
<p><b>2. Explain the outcome you want.</b> <i>Provide the person with the context from Question #1 in your preparation checklist.</i></p>	
<p><b>3. Explain the actions that you want them to take.</b> <i>Provide the person with the actions from Question #2 in your preparation checklist.</i></p>	

<p><b>4. Detail ALL your conditions of satisfaction.</b> <i>Describe the conditions of satisfaction from Question #3 in your preparation checklist.</i></p>	<p><b>Your Notes</b></p>
<p><b>5. Motivate the other person and make a promise.</b> <i>Use your answers from Questions #4 and #5 in your preparation checklist to help the person see what's in it for them if they are successful in fulfilling your request.</i></p>	

## 6. Get a proper response.

*Without a proper response, you lose the ability (a) to ascertain if the person understands what they have to do and is aligned with you and (b) to hold them accountable if they don't fulfill your request in line with your expectations.*

*The following are examples of answers you may get and how to handle them:*

- **Acceptance:** *Get explicit acknowledgement and agreement on what, when and how.*
- **Decline:** *Explore reasons for declining so you can see if there are options that will allow you to get to an acceptance.*
- **Counteroffer:** *Determine if the counteroffer meets your conditions of satisfaction and negotiate as appropriate.*
- **Promise to reply later:** *Get a specific time for the reply that's acceptable to you.*
- **Non-response:** *Ask, "Does that mean you'll do it?" Be polite but persistent in pinning the person down to one of the above answers.*

## Your Notes



Is Managing Director of Significa Group LLC and a former CEO of a well-known global company. She now coaches C-suite leaders and fast-rising high potentials who are being prepared for larger and more complex roles.

Significa also offers online courses and group coaching programs for individuals on the power skills of influence, persuasion, and presence.

## Kathy Dockry

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