The Influencing Formula

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I often get asked, "How can I get stakeholders to attend my meetings?" or "How can I get stakeholders' buy-in on the project?" These are complex questions and the easy answer is that you can't. That's right, you can't. As BAs and PMs we can't *get* anyone to do anything, but we can certainly influence them so that they *want* to. Similarly I hear other BAs complaining that they are given a solution and don't believe that they can step back and take the time to understand the business need. I'm told "Who am I to argue with the sponsor?" or "In our organization they shoot the messenger." How can we effectively influence when we have no authority to do so? I believe that there is an influence "formula" that includes building trust, being prepared, and having an overabundance of courage, and if we have those three ingredients, we will be able to exert a great deal of influence in our organizations. I will explore each of these concepts in future articles.

Terms, terms, and more terms

So what is influence, anyhow and how does it different from, let's say, persuasion or manipulation? What is authority? Let's start with the term "influence," which comes from the Latin root "influens" which means "to flow in." When we influence, then, we want our ideas to flow into others. That's different from "persuade," which comes from the Latin root "persuadere" which means "to urge." Influence, then, is more of a transference and persuasion more presenting an argument to convince another person. Personally, I prefer influencing to urging, since it feels more consultative to me. Another distinction I am often asked to make is the relationship between influencing and manipulating, the latter meaning, among other things, to "influence skillfully, especially in an unfair manner" and comes from the Latin "manipulus" meaning "handful." I have to say that in my experience, people who try to manipulate us are certainly a handful!

I would hope that as project professionals we would not manipulate others. How do I know that I'm influencing and not manipulating? I ask myself two questions: first, why am I trying to influence someone and second, is it for the good of the organization? It seems to me that if my purpose is to influence someone because it will help the project meet its objectives and help the organization achieve its goals, rather than for personal gain, then I am influencing, not manipulating. This aligns with the definition from the *A Guide to the Project Management Body of Knowledge 4th ed.* (PMBOK): "Influencing is a strategy of sharing power and relying on interpersonal skills to get others to cooperate towards common goals."(*PMBOK® Guide* 4th Edition, Appendix G5).

Do BAs and PMs have Power?

Authority is the "power or right to control, judge, or prohibit the actions of others." So far so good, but what is power? "The ability to do or act." Ah, so here we have come to the crux of the matter. As project professionals we do have power. But we do not have authority, which is a type of power. The table below helps explain the different types of power and the relationship between power and authority. This table provides the type of power, an explanation, and an example of each.[1]

Type of Power	Definition	Example
Reward	Inducement--the proverbial carrot	"If you work overtime, we'll give you a bonus."
Coercive	Punishment-- the proverbial stick	"If you don't work overtime, you will not be able to take vacation."
Expert	Use of skills and knowledge	"We need more time to install these PCs. My records show that this is how long it takes."
Referent	Reliance on another, higher source (e.g. quoting experts, sometimes incorrectly, name-dropping)	"I'm not happy about this deadline either, but the sponsor says it needs to be done by this date. "
Personal or leadership	The inner power that allows leaders to stand up for what they believe, along with the interpersonal skills and charisma needed to inspire and motivate others.	"I'll go with you to talk to the sponsor. I bet we can get her to approve more resources."
Positional/legitimate/authority	This type of power comes from one's position in the organization. This is what we mean by "authority."	"For better or worse, I'm the sponsor and a VP, and this is the budget I've approved."

Table 1

What this means is that project professionals, we BAs and PMs, have certain types of power and not others, although the exact ones might vary by organization. Most of us do not have reward, coercive, or positional power (authority). We can rely on referent power, but unless it is combined with personal power, it is weak and short-lasting. Therefore, generally speaking, we need to rely on two types of power to get others to act: expert and personal. Fortunately these are the strongest and longest-lasting forms of power.

What do we say to the project professional whose inclination is to be an order-taker, such as the BA who was reluctant to argue with the sponsor about the business need? I can't imagine an instance when I would argue with my sponsor or any key stakeholder. I remember the adage I heard years ago: "our sponsors aren't always right, but they are always our sponsors." How can we effectively influence them?

[1] Adapted from:
J. French & B.H. Raven, *Studies of Social Power*, Institute for Social Research, Ann Arbor, MI (1959). Viewed online on July 18, 2011 at: http://www.aspira.org/files/documents/youthdev08/U_V_M_6_top.pdf

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Here are some simple rules:

1. **Figure out how to build trust** and strengthen the relationship with your sponsors and key stakeholders, because trying to influence without trust might not be possible. Remember that building the relationship is more than "schmoozing." Sponsors might have neither the time nor the inclination to accept an offer to meet and greet or have lunch with you, and there are more effective ways to build trust (more in future articles).
2. **Know what you're talking about**. Rely on your business and professional expertise, past successes, and risks and horror stories from past projects. If you try to tap dance without being prepared, you risk your credibility and when that's gone, influencing will be next to impossible.
3. **Have the courage to recommend the right thing**. I have never been "shot" for recommending what I thought was best for the organization or project. That's not to say I have remained unscathed from trying unsuccessfully to do battle. But if I'm honest with myself, my scars have come from doing just that—"battles." "Arguing. Becoming emotionally attached to a position or result. Trying to change people's mind through persuasion. It has never been for recommending the right thing.

That's our "formula," then—trust plus preparation times courage. Stay tuned for more on this critical skill.

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