

Influencing Without Authority: Rev up your Internal Consulting Skills

Part 2: Overcome the Barriers - Start Influencing!

Elizabeth Larson, PMP, CBAP, CSM and Richard Larson, PMP, CBAP
Principals, Watermark Learning, Inc.

Industry Article

Watermark Learning

7300 Metro Blvd, Suite 207
Minneapolis, MN 55439 USA

Phone: 1(800)646-9362

Website: www.watermarklearning.com

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Part 2: Overcome the Barriers - Start Influencing!

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In part 1 of this article, we explored several barriers that prevent project professionals – Project Managers and Business Analysts – from influencing without having the authority. We listed four main factors that we’ve seen and exist in virtually every organization: lack of positional authority, lack of sponsor support, unclear roles and responsibilities, and other factors such as company culture, product complexity, time pressures, etc.

Now we’re ready to explore some ways that help overcome these barriers. They revolve around the theme of project professionals acting as consultants, whether you are an internal or external one. We both worked as internal consultants early in our careers. It taught us the value and power that comes from a consultative approach. Your clients will thank you for using it because it helps solve business problems and gets things done.

Overcoming Barriers to Influence

Consultative Model

What’s missing is a consultative approach. This type of approach involves working with the business to understand the organization problem or opportunity, recommending the appropriate solution, and facilitating the implementation of the solution. We call this “Doing the Right Thing” because it involves probing into the real need behind the stated need to avoid delivering products that don't meet business needs or are difficult to use. This approach helps avoid “jumping to solutions” and dramatically reduces the “Oh, darn you gave me what I asked for” phenomenon.

A consultative approach is to:

1. **Understand the Business Problem or Opportunity** based on the actual business problem or opportunity, and its underlying Root Cause or Business Driver, then
2. **Recommend Appropriate Solutions**, which is to say, find out the “Right Thing” that meets business needs. Finally, to ensure proper delivery, we then need to
3. **Facilitate a Workable Implementation Approach and Evaluation Measures** to ensure the solution meets business needs, and will continue to do so.

1. Understand the Business Problem or Opportunity

Getting to the Real Situation

There are a variety of methods to understand and solve business problems, including:

- Six Sigma has been popular for some time, although it is stronger on process than on project management.
- BPM. Various flavors of Business Process Management, Improvement, Analysis or whatever your organization may call it.
- The PMBOK addresses business needs, but in a limited way and mainly from a PM standpoint.
- SARIE. A simple but effective consulting approach we use in working to do the “right thing” is based on an acronym for Situation, Analysis, Recommendation, Implementation, and Evaluation. It starts with the situation, and focuses analysis on the underlying causes or drivers behind the situation.

Whatever the approach, better outcomes will result if people follow it consistently, which requires training and organization commitment. It also requires trust between you – the consultant – and your client. There are ways you can work at building trust, summarized in Figure 1. Some of these things we may do naturally, such as acting with integrity, but others, like establishing a communications protocol, are things you can practice.

Be honest and authentic	Communicate bad news
Act with integrity	Act consistently
Respect, value, and accept others	Acknowledge mistakes
Respect differences	Acknowledge others' contributions
Get input from others	Share information
Be credible	Make and meet commitments
Facilitate communications protocol	

Figure 1. Methods of Building Trust.

Change Agent as Consultant

Another way of ensuring the right thing gets done on projects is to concentrate on *facilitating* the change, not *owning* it. In many ways, this is what happens whenever a sale is made.

There are many sales processes in the sales industry. SPIN Selling®, consultative selling, Zig Ziglar, and so on. Here is our recommended consultative sales process, which closely follows our consulting model, and can be directly applied by PMs and BAs to project work.

- Prospecting
- Qualifying and Needs Awareness and Analysis
- Proposing and Closing
- Follow-through and Servicing what was sold

As with any consulting process, understanding the business situation requires sincere questioning of our buyers and their needs. It is the first step in “engaging” sponsors and can help in building their respect for you. Questioning is part of both prospecting and “qualifying” buyers. We need to ask good questions to discover what those needs are as opposed to being a walking product encyclopedia where we spew forth feature after feature of our process or product.

An example of how *not* to do this is a project manager at a customer of ours who spent time during status meetings with clients reading to them from the PMBOK! An approach like this is sure to irritate most business partners and will do the opposite of engaging them.

Questioning Tips for Consultants

- **Probe Deeply.** To facilitate a successful “sale,” we need to probe deeply to find out what motivates buyers. For instance, in order for us to really get at the real need behind the stated need, we would not ask an executive “what is your business need for an ERP system?” Instead, we would want to determine the pain related to not having integrated systems. “Deeply” means you may have to ask “why” up to 5 times to get to the real needs.
- **Use Listening Skills Well.** This is essential to really understand answers. Summarize, follow-up, and keep probing deeper.
- **Watch Non-Verbals.** Remember, only 7% of communication is verbal. Over half of communication is visual.
- **Open-ended vs. Closed-ended Questions.** Use them appropriately, employing open-ended questions to uncover **needs** and closed-ended questions to **confirm specifics**.
- **Avoid Leading Questions.** A good way to break trust is to ask leading questions. Examples of leading questions: “What do you think about SAP?” “Have you ever thought of having a PMO?” “Have you ever thought of a web site?” Non-leading questions encourage prospects to “open up” and reveal their needs.

In general, consultative questioning as discussed here helps to discover needs together, which increases buy-in. Probing for selling something is very similar to gathering project requirements.

Practical Tools for Understanding Business Problems and Opportunities

There are many tools and techniques that can aid in the understanding of business problems and opportunities. Some of our favorite ones that are practical and highly reusable include:

- Process Maps and Workflow Diagrams
- Cause and Effect Diagrams, particularly fishbone diagrams
- Pareto Charts and corresponding analysis

2. Recommend Appropriate Solutions

As we know, but people don't buy a product for its own sake; they buy what the product can *do* for them. For instance, we buy certain brands of toothpaste because we want whiter teeth or less plaque, or fresh breath. Business leaders don't want to invest in technology or project management for its own sake, no matter how compelling a discipline they are for *us*. The reason business executives invest in a project or new technology it is to reduce costs, increase revenues, make happier customers, etc. The solution and any alternatives we recommend should reflect that.

All too often, as PM or BA practitioners, we focus on the features and functions of the products we are producing. Whatever the project, a significant amount of time is spent on defining the requirements for what the product *IS* (features) and what it will *DO* (functions). Much *less* time is devoted to determining the **ADVANTAGE** of using the new product (in other words, the benefits to the business).

The second part of our consulting model involves recommending solutions that **match** what was discovered in the first phase, *Understand the Business Problem or Opportunity*, so the recommendation is in balance with the need. Effective sales people and consultants always focus on benefits to the “buyer.” For example, a benefit of a web site might be to reduce calls to the help desk, so focus on the most common types of help desk requests, and put them on the web site first.

Working with Stakeholders

Part of the consulting and “change agent” process is to respond appropriately to various types of stakeholders. Effective consultants instinctively adjust their style and approach depending on the type of buyer they are serving. We can do the same as internal consultants to maximize our effectiveness. Consider the 3 types of sponsors described earlier. Figure 2 lists various strategies for adapting to each type.

Sponsor Type	Extreme Case	Strategies for Dealing with Type
Dominant Sponsors	Tell us EXACTLY what they want, then blame us when the solutions don't work	<ul style="list-style-type: none">• First ask “what business problem are we trying to solve” with the solution they bring us (appropriate for all types of sponsors; even more so with this type)• If solution is fixed (e.g., a contract is already signed), then reframe the situation as a gap between that solution and the true business needs
Weak Sponsor	Come to us for solutions, but then often don't like the ones we develop	<ul style="list-style-type: none">• Explain risks of not spending time discovering requirements• Present alternative recommendations with benefits and risks; get sponsor to approve and sign off• Keep sponsor well informed during project (appropriate for all types of sponsors, even more so with this type)

"Missing" Sponsors	Are present only in name or at project kick-off. To fill the void, we guess and/or tell CLIENTS what they're going to get, both of which are risky.	<ul style="list-style-type: none"> • Insist on project charters developed by and approved by sponsors (appropriate for all types of sponsors, and even more so with this type) • Use techniques to uncover stakeholders (e.g., RACI, Use Case Diagrams, etc.) • Use "prospecting" techniques to find "buyers" and determine sponsors
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Figure 2. Challenging Sponsor Types with Strategies.

Practical Tools for Recommendations

Some of our favorite practical tools for facilitation recommendations include:

- Decision-making matrices, including weighted ranking and pairs compares
- Decision trees
- Prioritization selection matrix

3. Facilitate a Workable Implementation Approach and Evaluation Measures

An important part of the influencing process is to recognize a simple truth: *even the best recommendations will go to waste if they are not accepted.*

One thing that can help in assessing how well your recommendations will be accepted is to perform some simple audience analysis. As mentioned earlier, effective consultants and salespeople adapt their approach to fit the audience. So, it can be crucial to categorize your stakeholders and concentrate on the ones with the most authority: those who can champion or sabotage your efforts.

Evaluation Measures

The key to evaluating a project outcome is to do it in business terms. Yes, it can be important to have project metrics such as earned value, variances from baselines, etc. But, those are *project* evaluations.

The SARIE method previously mentioned has two separate steps that deal with Implementation and Evaluation. Implementation typically involves a project, and normal PM methods and measurements would be employed for that. The Evaluation portion of SARIE is meant to remind us that we need to facilitate the evaluation of our change or new product. The evaluation measures used should be meaningful to the business.

Remember to find out what the business cares about in order to link alternatives and recommendations to those benefits. As you are putting evaluation criteria together, remember to determine meaningful measures of the benefits. Typical measures include: a) Cycle time of a process, b) Number of inputs and outputs in a process and their cost, c) Customer satisfaction, d) Cost of rework (waste, scrap, defects), etc.

Practical Tools for Recommendations

Some of our favorite practical tools for facilitating recommendations include:

- SARIE forms
- RACI charts to document roles and responsibilities for the change effort
- Project charters for the business to document the need for and sanction projects

Summary

In this article we focused on the problems presented by a lack of influence, and insights into why those problems typically occur. By employing a formal or informal consultative approach, project professionals can gain the needed influence to facilitate positive project outcomes. This approach combines good analysis skills to uncover real needs, plus corresponding “change agent skills” to aid in working with the human aspects of change that invariably arise in projects. The outcome is greater influence on projects and other work efforts. See Figure 3.



Figure 3. The consulting route to influence.

Why do we want greater influence? If we can more often facilitate clients to “Do the Right Thing,” it will lead to less rework on projects, and will save time, money, increase the satisfaction of those clients, and provide us with almost immediate credibility. Any good consultant would be happy with that!

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- See our course called [Influencing without Authority](#).
- Read our article “**101+ of the Most Effective Questions You Can Ask to Elicit Requirements and Uncover Expectations**” at <http://www.watermarklearning.com/articles.php>.

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