



PERSONAL DEVELOPMENT

# INFLUENCING DECISION MAKERS

How do you make your voice heard by those with sway in the workplace? In the latest in F&M's series on 'How to get better at ...', **Jennifer MacKay** offers some techniques for influencing the decision makers.



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When influencing others 'downwards', age and experience are on our side – plus, if dealing with the under fives, we can always play the 'because I say so' card. Influencing 'upwards', however, is a different and more difficult game: one in which the deck seems to lack those all-important aces.

For finance people, influencing upwards is further complicated by their having (in this context) a dual role. Their role has them serving as business partners on the one hand, driving the organisation forward by feeding into strategy discussions and decision making. On the other, they act as the conscience of the business, pointing out risks and saying 'no'.

Yet the obstacles can be overcome. This article offers a

## ‘A good communicator knows what is important to the other person, and how to present the information’

simple two-step set approach for successfully influencing upwards.

### Step one: planning your approach

When setting out to influence upwards, knowledge is definitely power. So it is important to:

- know your x factor;
- know your Goliath; and
- define the outcome.

#### What’s your x factor?

The very expression ‘influencing upwards’ implies the other person’s opinion carries more weight than yours. But don’t let that put you off. Instead, play to your inbuilt strengths.

Do an internal audit to discover whether your particular x factor is:

1. the ‘expert factor’ – as a finance person you may have information and skills that others don’t. If this sounds like you, remember to stress that you have what they need;
2. the ‘likeability factor’ – do you have an existing rapport or share mutual interests with the person you are influencing? If this sounds like you, capitalise on your commonalities and remember that being likeable can make the other party more open to hearing your point of view; or
3. the ‘track-record factor’ – have your suggestions proved profitable in the past? If this sounds like you, highlight your sensible judgement and reliability.

Once you’ve identified your x factor, use it to support your argument.

#### What type of Goliath?

You’re not the only one with an individual style. The person you seek to influence may be an obvious Goliath to your David, but you still need to analyse them more. A good communicator knows what is important to the other person, and how to present the information.

Decide which of the profiles below sounds like your Goliath – and adopt the suggested approach.

#### 1. Probing

They love detail and ask loads of questions.

Approach: be well-prepared and back up your facts. Don’t be thrown by questions, as these can indicate interest just as frequently as dissent. Get them to commit on what they like, then work out where to go next.

#### 2. Thoughtful

They may want to consider all the angles... in their own time.

Approach: don’t waste yours. Send information over in advance. Be clear about your own deadlines and know theirs. Getting something in writing may be faster than a face to face.

#### 3. Negatron

They find few positives in what you have to say, poke holes in your argument and make counter suggestions. It may be that this person is plain pessimistic. It may also be that they are a talented problem solver who tends to put a negative slant on their words.

Approach: leverage their suggestions and incorporate them where you can.

#### 4. Master

They can sit in silence for an eternity and don’t give much away.

Approach: don’t be tempted to fill the silence with gibberish or to climb down on what you want. Instead get comfortable with the silence and try asking them some direct questions.

#### Define the outcome

Having identified the cast of characters, you’re ready to define the outcome. Such planning is key, as it prepares us for possible outcomes and helps us stay

focused when both stakes and stress levels run high.

So, on your own behalf, work out:

- what outcome you want;
- the advantages and disadvantages of your proposal;
- how your proposal fits the big picture, in terms of values and vision; and
- where you can be flexible – eg is there more than one way to achieve your goal? Can you delay implementing a new strategy or can it be piloted in one part of the business?

And for the other party, try to discern:

- what is important to them;
- the best way to present the information;
- what makes this proposal good for them; and
- how they like to make decisions.

#### Step two: the conversation

You’ve planned out what you want to say and it’s time to influence.

Influencing conversations can be intense. To help yours succeed, let’s examine:

- why they go wrong; and
- how you can keep them on track.

#### Why things go wrong

Have you ever noticed that we can become preoccupied with getting our point across when we are trying to influence others?

Two damaging things tend to result. Firstly, we become distanced from the person we want to influence, because our energy goes into being right and pushing our point (and the other person also starts to dig in their heels).

Secondly, we stop really hearing the other person. When they speak we stop listening and start planning what we will say next. We reach what is effectively a stalemate with each repeating their points over and over.

The desire to be right – or at least heard – overshadows the effort to find a solution workable for all.

### Keeping your influencing conversation on track

For a more constructive approach to influencing upwards, see the tips in the box, right, 'Tips for keeping your conversation on track'.

### Conclusion

While at times influencing upwards may feel like an uphill battle, we have a responsibility to support others to make robust decisions. Getting better at influencing upwards also helps us improve how we perform our own job. And if you follow the tips, your Goliath might just be more amenable than you think.

#### FINANCE & MANAGEMENT FACULTY

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## TIPS FOR KEEPING YOUR CONVERSATION ON TRACK

### 1. Structure your argument with the three Ps:

- Point: make your point.
- Proof: provide proof to back it up.
- Profit: spell out how your point will profit the other person.

### 2. Manage the 'no' word

Saying no and sticking to it can be tough when influencing Goliaths.

- If someone is trying to distract you from your target, use a 'bridging' technique to bring the conversation back, eg 'that's an interesting point, but today we are looking at this'.
- If someone insists on asking you the same question over and over, use simple repetition, eg 'as I mentioned earlier, if we go ahead with x, y will happen'.
- If conversation is getting heated, keep sentences short and stick to the facts, eg 'our agreed budget doesn't allow for this'.

### 3. Develop delivery skills

What we say needs to be matched by how we say it. Your message may be 'this decision is right for the business', but a wavering voice can convey 'I am not in control'. To look the part:

- maintain steady eye contact;
- speak slowly in a calm well-paced voice;
- don't fidget; and
- befriend the pause – say what you want or ask a question... and then stop speaking.

### 4. Be flexible

Knowing what you ultimately want is important, but so is flexibility in getting it. Be prepared to entertain other options. If the other side feels browbeaten into agreeing, chances are the agreement won't last.

### 5. Ask more questions

Some people think that asking questions signifies you have lost control. But influencing isn't just about sending out information and persuading people; it is an opportunity for learning, problem solving and developing a deeper understanding of issues too. So ask:

- 'what would you like to see happen?';
- 'I know x is important to you. If we do y, will that satisfy x?'; or
- 'if your revenue is one third of what you are forecasting, will this still work?'

Thoughtful questions are also less likely to put people on the defensive. They open up the conversation and give you more information, so you can tailor your offer.

### 6. Be empathetic

While we may have opposing views, it doesn't mean we can't empathise. Build rapport and trust with language like:

- 'I understand your concerns';
- 'I see what you mean'; and
- 'I know this isn't ideal.'

### 7. Agree action points

Once you have confirmed an approach, agree the action points. Respond to yours quickly.