achieve+forum™

Leading with Influence

Preparation Materials

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Contents

Preparation Materials

Nobody has the formal authority to achieve what is necessary, not even with those who report to them. It is an illusion that once upon a time managers could make their direct reports do whatever was needed. Nobody has ever had enough authority—they never have and never will. Organizational life is too complicated for that … Whatever your job, you are expected to join your colleagues in doing important work, which will lead you to influence and be influenced.

—Allan R. Cohen and David L. Bradford[1]

INTRODUCTION

Today, most leaders must achieve many of their priorities and objectives collaboratively with and through people over whom they have no direct or positional authority.[2] These non-positional leadership situations require that leaders use the only “authority” available to them: influence. In other words, the complex collaboration environment today increasingly means that leaders must forgo the idea that position and reporting relationships give them the authority to get things done. They must lead with influence. AchieveForum defines “leading with influence” as *the ability to generate results collaboratively, in a variety of contexts, without direct or positional authority*.

Companies whose leaders influence effectively outperform industry peers. Recent research by McKinsey & Company shows companies that “crack the code” of complex collaboration outperform industry peers as evidenced by significantly higher earnings before interest, taxes, depreciation, and amortization (EBITDA) per employee. A portion of the code-cracking relies on having the systems, climate, and technology to support complex collaboration, but personal effectiveness is equally important.[3]

AchieveForum’s two decades of research in the area of non-positional leadership and influence form the basis of this program. This research shows that people who effectively lead with influence focus on doing three things very well:

- They create highly strategic portfolios of influence relationships that are directed toward helping them achieve specific objectives and priorities.
- They know how to work with others to ensure the effectiveness of their collaboration investments.
- They understand the importance of relationships and actively seek to build personal relationship capital with the people they need to influence.

1 *Influence Without Authority, 2nd Ed.* (New York: John R. Wiley & Sons, Inc., 2005).
2 Direct authority exists between a manager and a direct report; by virtue of position within the organization, senior leaders in organizations also have positional authority.
3 Scott C. Beardsley, Bradford C. Johnson, and James M. Manyika, “Competitive Advantage from Better Interactions,” *McKinsey Quarterly*, May 2006.

Leading with Influence is a program that teaches strategies and skills for leading effectively without direct or positional authority—which is essential to delivering results in today's increasingly matrixed and collaborative environment. Leading with Influence enables you to exercise more effective non-positional leadership.

PROGRAM OBJECTIVES

Upon completing Leading with Influence, you will be able to:

- Improve your ability to achieve business priorities using non-positional leadership
- Create a portfolio of strategic influence relationships
- Build clarity and accountability and limit unproductive conflict with people on whom you rely to achieve your objectives
- Sustain and enhance your influence relationships
- Improve your personal influence

PREPARATION MATERIALS

These Preparation Materials include two activities to complete prior to the session:

- *Preparation Activity: My Business Priority.* You are asked to identify and analyze a business priority or objective that you must lead without direct or positional authority.
- *Preparation Activity: Influence Profile.* You are asked to assess your own Influence Profile.

The work you do to prepare will be used in the session during several activities. After you complete your preparation activities online, save the Preparation Materials document to your hard drive ("save as" and rename to your chosen folder), and then be sure to *print the document and bring it with you to the session.*

Preparation Activity: My Business Priority

PURPOSE

To choose and complete an initial analysis of a priority or objective that you will work on throughout the session

INSTRUCTIONS

Step 1: Choose a Business Priority or Objective

Choose an important ongoing business priority or objective you are responsible for that relies primarily on collaboration with people over whom you have no direct or positional authority. (See below and the next page for some examples.)

Select one priority. You will spend time throughout the session planning how to enhance your efforts working non-positionally (without positional authority) to drive results for this priority. Use the following criteria to help guide your selection:

- It is sizeable enough to be important to your success and to the organization.
- It requires the input and actions (work/time) of people over whom you have no positional or direct authority (in other words, people you have to influence).
- You wish to enhance your ability to lead this priority or objective more effectively.

What not to choose: This program is not about team leadership, your ability to lead a group of direct reports, or “project management” in the traditional sense. It would be best not to choose these kinds of priorities or projects to work on during this session.

Step 2: Complete the Analysis

Use the My Business Priority Worksheet following the Sample Priorities and Objectives to analyze your ongoing business priority or objective.

SAMPLE PRIORITIES AND OBJECTIVES

This list provides examples of the types of non-positional business priorities and objectives you could choose.

- A manager needs to engage colleagues in completing a series of requests and committing some of their resources so that her objective succeeds.
- A marketing manager needs to get input from the sales force on the content of a marketing campaign.
- Due to her technical expertise, a technical support manager has responsibility for determining the new software additions to be implemented on the company intranet—she must achieve international input and agreement.

- A marketing manager needs to get salespeople in a certain region to cooperate in a leads-generation and follow-up process.
- An account director must orchestrate a response to a major RFP. This will involve contributions from a cross-functional group of Sales, Service, and Product experts.
- The manager of a customer service team needs to get members of Sales and Marketing to make better handoffs to her team, with more complete information.
- An HR manager is implementing an annual performance review process and is getting uneven compliance from various groups across the company.
- The Marketing department finished work to reposition the company brand in the marketplace. A Sales department manager is now responsible for the sales force understanding and communicating this information to their clients.
- A Customer Service leader must investigate a series of service failures with a key customer, analyze what went wrong, and put a service recovery plan in place. To do this, she must work across several areas of the organization.
- An IT manager is responsible for ensuring two customer service departments migrate to the new software platform on time, within budget, and with no loss to customer satisfaction.
- The HR department developed a much-requested program to build employee development capabilities. An HR professional now has the responsibility of increasing adoption of this capability throughout the organization, which includes sites in the U.S. and Europe.
- A product development project leader needs others in the organization to participate in critical prototype testing to determine further development.
- A technology manager needs to get the business unit to adopt new customer service software in a short time frame.
- A call center has adapted a new process for responding to inbound customer requests. A call center manager is leading the effort to integrate this process in other call centers both in the U.S. and in their (the company's) centers in India.

Note: You will share the following information with the group during the session introduction activity; be prepared to share your thoughts succinctly and clearly.

- Write a brief description of your ongoing priority or objective.
  - What larger organizational goal does this effort support?
  - Why is this effort important to you?
  - Why might it be important to others (inside or outside the organization)?
- What is the desired business outcome? How will success be measured?
- What is your key challenge for leading this business priority without positional or direct authority?

Preparation Activity: Influence Profile

PURPOSE

To identify your baseline Influence Profile

INSTRUCTIONS

The 30-item Influence Profile will provide you with a baseline measure of your current approach to important aspects of leading others without direct or positional authority.

As you complete the assessment, think particularly about working with people over whom you have no direct or positional authority.

Complete the self-assessment. After you have done so, turn to the following page to score your findings.

Bring your work to the session, where you will analyse your results.

WHAT IS IT?

In order to deliver results today, most of us need to work very effectively with others inside and often outside the organization over whom we have no direct (managerial) or positional (high rank in the organization) authority. This ability is called “influence” and literally means *the ability to generate results collaboratively, in a variety of contexts, without direct or positional authority*. This assessment contains the 30 influence practices shown by AchieveForum’s research to be highly effective in enhancing your ability to achieve your objectives.

This tool is a self-assessment. Completing it results in an Influence Profile that provides a baseline measure of your current influence strengths and vulnerabilities.

WHY USE IT?

Use this tool:

- To help you learn more about your influence strengths and weaknesses
- To get feedback from trusted others to test their perceptions of your influence effectiveness
- To help you focus on areas in which to make improvements to your influence

HOW DO YOU USE IT?

1. As you complete the assessment, think particularly about situations in which you must work with people over whom you have no direct or positional authority (inside and outside your organization).
2. Use the scale to rate the extent to which each statement is true of you.

REMEMBER

- The assessment provides you with an idea of your influence strengths and vulnerabilities.
- You may use the assessment to obtain feedback from your trusted peers, your manager, or other people in your organization. Ask for detailed feedback, especially in areas in which you would like to make changes.
- Do not take the assessment as the final word on your influence; it is a high-level assessment designed to help you identify areas in which to focus your efforts to increase your adaptability.

Use the scale below to rate the degree to which each statement applies to you.

1	2	3	4	5
Almost Never True	Seldom True	Sometimes True	Often True	Almost Always True

Rating	Item	Statement
4	**1**	I focus on creating influence relationships designed to achieve particular goals and priorities.
4	**2**	I am courteous, respectful, and patient when interacting with others.
3	**3**	I link the decisions that must be made by others to agreed upon goals and objectives.
4	**4**	I seek out relationships with those who can connect me to others across and outside the organization.
3	**5**	I create general awareness of my areas of resources, information, and expertise.
3	**6**	I identify and recruit the diverse skill sets I need to achieve my objectives and priorities.
4	**7**	I build and maintain relationships of reciprocity and trust.
4	**8**	I link the efforts by others required to carry out my objectives to a compelling organizational need.
3	**9**	I extend my own influence by helping others build effective relationships upon which they can rely to achieve their objectives.
3	**10**	I know the typical things that trigger conflict for me and manage them as they arise.
4	**11**	I am well aware of my own unique abilities, resources, information, and expertise.
4	**12**	I use objective criteria to guide the decisions that I or others must make to carry out my priorities.
3	**13**	I regularly assess the effectiveness of my influence relationships and take steps to improve their extent, quality, and focus.
3	**14**	When working with others, I identify and emphasize relationships we have in common.
3	**15**	I identify the needs and expectations of each person who is helping me to achieve an objective or priority.
4	**16**	I build relationships with people who can help me anticipate and identify future priorities.

Rating	Item	Statement
4	**17**	I acknowledge the unique talents and contributions of the people who help me achieve my objectives.
4	**18**	I seek mutually satisfying solutions to conflict.
3	**19**	When working with others, I uncover and highlight the real similarities we share.
2	**20**	I clearly define what each person must do to successfully contribute to my priorities.
3	**21**	I know what the people I need to influence personally value.
4	**22**	I use my own and the organization's goals to prioritize the relationships I need to develop.
3	**23**	I approach the people I need to influence as equals.
3	**24**	I go beyond my close colleagues, friends, and functionally related parts of the organization to build the relationships I need to achieve my objectives and priorities.
3	**25**	I connect my requests to a personal benefit for the individual.
2	**26**	I take steps early to acknowledge to another that a conflict exists.
3	**27**	I make sure that others know the specific ways I can help achieve their objectives.
4	**28**	I know my own skill and knowledge limitations.
3	**29**	I identify who should own or provide input to each decision that impacts my effort.
3	**30**	I contribute—proactively and regularly—to the priorities of those whose help I may need in the future.

1. **Transfer your ratings**

Transfer your ratings for specific items to the columns below. Sum the columns in the "Column Totals" row.

	Part A: Strategic Influence Portfolios		Part B: Strong Collaboration Investments		Part C: Personal Relationship Capital	
	Item #	Rating	Item #	Rating	Item #	Rating
	1	4	3	3	2	4
	4	4	8	4	5	3
	6	3	10	3	7	4
	9	3	12	4	11	4
	13	3	15	3	14	3
	16	4	18	4	17	4
	22	4	20	2	19	3
	24	3	26	2	21	3
	28	4	29	3	23	3
					25	3
					27	3
					30	3
Column Totals		32		28		40

2. **Calculate your Influence Profile**

Transfer your column totals to the first column below.

In order to compare your relative standings on the three influence assets, you must first normalize your scores. To do this, multiply the column totals by the indicated weighting factors.

Part A Score: 32 x 2.22 = 71.04

Part B Score: 28 x 2.22 = 62.16

Part C Score: 40 x 1.66 = 66.40