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Influencing for All Seasons: Creating and Influencing Specific Business Relationships

by Libby Wagner

A lot of times, actuaries, like all professionals, imagine it takes entirely different skillsets to influence different people. This may be partially based on their positions in their companies or on their work relationships with their peers and other people in their firms. For example, some believe that influencing "up," that is, toward your clients and/or superiors, is the most challenging of all. Others believe they have no power to influence vendors or suppliers.

In reality, the person sitting across from you at a conference table or desk is exactly that: a person. There are dynamics that come into play, for sure, but one thing I feel certain about: relationships pretty much trump anything. The strength of your relationships and the level of trust that you have with those in your "circle of influence" is directly related to how these conversations are going to go.

As you enter into important conversations with the people who make up your circle of influence, there are some general and specific things to keep in mind:

- Context of the situation.
- Relationship between you and those you are trying to influence, including history and familiarity with, or attachment to, the issues at hand.
- The existing power dynamic, i.e., are you influencing up, down,

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or across, internally or externally?

- Your skill and experience with delivering high levels of "core dimensions," especially empathy.

That's why—when I help people hone these skills—I always suggest that they assess the relationship based on two foundational elements: trust and commitment.

Question 1: What's your relationship like with this person? What is your level of trust?

Question 2: Do you have commitment to shared vision and/or goals? Are you on the same page?

Here are some general things to keep in mind when you find yourself in these influencing situations:

Influencing the People Who Work for You

1. Normally, when influencing anyone, you always have the three effective choices to use when considering your options or if someone says "no" to you. These are: influence, acceptance or removal. However, when the case involves poor performance, acceptance is not an option. You cannot "accept" poor performance because that means you're really not fulfilling your responsibilities. You either need to *influence* the employee to improve performance or you need to *remove* him or her.
2. Keep in mind the power dynamic here. You need to create opportunities for open, honest communication among you and your team. Your relationship with your employees is the single biggest leveraging point in an organization, since the relationship between the employee and the immediate supervisor is what influences performance, morale, productivity, employee engagement, etc.

Influencing Your Peers and Colleagues

1. Having a high-trust colleague at work is invaluable. Cultivate these relationships and develop them. When you need to confront or influence a peer, keep in mind that saving face may be incredibly important to him or her. Be conscientious of where you have conversations and keep them confidential, if possible.
2. Work to create win-wins if a peer or colleague is creating a roadblock or not performing to standard. Confront and discuss directly rather than borrowing position power and going above someone's head.

Influencing Clients

1. If you take time to develop relationships with your clients, they will not only be satisfied (or better yet, delighted), they will be loyal. Relationship-based selling trumps price and the competition almost all the time. There are exceptions, but not many. Your clients will buy from you because they believe you have great value for a reasonable price. Try not to focus on the one-time sale, but rather on the long-term relationship. That will help you create many sales along the way.
2. Most of the time, influencing clients effectively involves more listening than talking. If you can discern—through careful listening and clarifying questions—what they really need, you can help them. Don't concentrate on yourself—focus on them.

Influencing Superiors

1. Influencing up is necessary! One essential thing to try to keep in mind when using influence as a power dynamic is that another person's focus is most likely very different from yours. The mistake people often make is that they feel like they have to build a strong case and so they spend the whole time focusing on themselves. Really appeal to the WIIFM factor: what does this person care about? What's important to him/her in this scenario?
2. You *can* influence someone to stop micromanaging you! Your language use is critical. Tell your manager what you want, which is increased autonomy. Focus on how allowing you more space or authority will benefit him or her. Offer reassurance that you'll keep him in the loop so he won't be surprised by anything. Again, his or her reputation, how others see him as a leader, and their credibility, are probably important to them. Superiors generally want to be seen as competent, confident and carrying out the mission of the organization. Use alignment to help you.

Boards or Governing Groups

1. Depending upon your direct relationship with a board (or members on a board), you will want to remember that their scope of responsibility and charge is different from yours. If you are the CEO, president or director, the dynamic is such that they may support or not support you as a group, but the group is made up of individuals. Cultivate relationships with individuals. Furthermore, take steps to refine your speaking skills.
2. If you are working with agencies or governing bodies (such as councils, departments, etc.) made up of elected officials, this can cause a complex dynamic as well. Again, your ability to influence

people in this group will be enhanced by having one-on-one relationships and getting to know and earn the trust of members. It isn't about manipulation or "politics" (even if it is politics). It's about gaining buy-in, commitment, creating common ground and really working to define a win-win scenario.

Influencing Vendors, Suppliers and Contractors

1. Sometimes, influencing vendors, suppliers and contractors is similar to influencing peers because you have worked to establish a collaborative, collegial relationship. One way to positively impact these relationships is by thinking about how you can help their business outside your typical transactions, i.e., referrals, resources or opportunities you hear about, etc.
2. If you have a misunderstanding or a disagreement with a vendor, supplier or contractor, it's important to confront and resolve it respectfully. They are in your network of "success" partners and you want to make sure that you develop strong ties. If it's not a good relationship, and you decide to end it, always take the high road. Cut ties expeditiously and respectfully.

Your ability to use language well, to enter into conversations boldly and confidently, and to create strong relationships and demonstrate understanding across multiple groups and situations will absolutely determine your ability to create, sustain and maintain a profitable culture. Use the tips presented in this article and watch your profit culture grow.

Libby Wagner, Libby Wagner & Associates, is perhaps America's only poet regularly welcomed into the boardroom. Author of the new book *The Influencing Option: The Art of Building a Profit Culture in Business* (Global Professional Publishing), she has been labeled The Influencing Coach™ by her clients. Her expertise in leadership, strategy, management, and executive team development helps organizations create environments where clarity and increased trust lead to unrivaled results, shaping such Fortune 500 cultures as Boeing, Nike, Philips and Costco. For more information, visit Libbywagner.com or Influencingoptions.com.