



SOCIETY OF ACTUARIES

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Critical Influencing Skills for Advancing Professionals (Part 3)

By Raymond E. DiDonna

Beyond possessing technical skills, actuaries must be outstanding communicators and influencers in order to maintain the critical roles they play within insurance organizations. Parts 1 and 2¹ of this series discussed how to influence your team and your peers. In this final installment we will focus on influencing leaders.

INFLUENCING MANAGEMENT

Here's the first thing you need to know to understand how to influence those above you: They are primarily interested in just one thing ... *how you can help them be successful.*

It's really just as simple as that. If you bring them problems without solutions or requests that are not germane to making the business or the team more successful, you will be tuned out immediately. So, you need to convince them that what you want helps them. And I want to focus on two areas to help you do that.

The first is about taking **ownership and accountability**. You cannot make a compelling case to influence leaders unless you "own" the topic with complete conviction—you have to believe in what you're asking for. You have to be persuasive; you have to be passionate. Trust me, leaders (among others) can see right through someone who is not really committed to an idea or a course of action. And if you're not, why should they be?

So as professionals mature and gain greater responsibility, there is a greater need to become accountable for what you are doing ... for what you are working on, for ideas, for solutions, for recommendations. Don't walk around thinking this (whatever this is) is not mine, I'm just one of the workers. Walk around thinking "*It is my responsibility to drive to the right conclusion. I will be successful if I do that, and I won't be successful if I just take a back seat and let others be accountable.*"

The second area is **knowing your audience**. Many otherwise compelling arguments have been lost

simply because the person making the case (trying to influence) did not understand his or her audience.

Not everyone receives and absorbs information the same way. Some are data people (like many actuaries). The case needs to be proven on paper, with all the numbers adding up to make logical sense. Others like to make sure they are considering all the options. They don't just want to know what your preference is; they want to see other choices and why you may have ruled those choices out. And still others just want to know the bottom line. They don't want to get wrapped up in all the details, nor do they want to have five options. They just want to hear in a concise way how what you want is going to help them.

Besides absorbing information, there are also different decision-making styles to understand. For example, analytical types like to mull over the information you provide. They may not only want to see all the data that backs up your argument, but they may also want time to make a decision. They will likely not accept your proposal on the spot. Consequently, you had better account for their style in your influencing process.

Other leaders prefer to be quickly decisive—they like to review the information presented, make a decision, and move on. If you are faced with this type of decision maker, you need to make sure you have all the information available during the meeting. You can't defer if the leader is ready to decide.

Finally, you might run into a consensus-building decision maker; someone who likes to involve others. Here, you need to make sure you know upon whom the decision maker relies. If you do, you may be able to influence them in advance, clearing your path with the decision maker.

The last thing you have to think about when trying to influence management is how much time you will have in front of them. If you don't know this in advance, I suggest thinking in terms of three



Raymond E. DiDonna, FSA, is currently senior vice president and chief operating officer of mL3 Global Life, a joint venture company that provides consulting services and technology solutions to the North American life reinsurance market. He can be reached at ray.didonna@ml3globallife.com.

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different potential time frames: 30 seconds, 10 minutes, and an hour. Trust me when I tell you there is no precision to this. However, what I have found is that whatever idea, concept or solution I'm trying to "sell," I know that I need to be able to communicate it:

- (1) Very quickly (in one or two sentences)—the proverbial elevator speech, or
- (2) In a short amount of time within the bounds of another meeting (you might find yourself with 10 to 15 minutes of a two-hour senior leadership team meeting, for example), or
- (3) In a forum designed for my topic alone where I must bring all the details—could be 30 minutes, 60 minutes, 90 minutes, etc. However, I know if I have that length of time that I must know my topic inside and out because there's a lot of time being granted for me to try to influence.

So remember: To influence the leaders above you, take ownership and accountability for the topic about which you are trying to influence and make sure you know your audience. ●

ENDNOTE

¹ Published in the August and November 2013 issues of *The Stepping Stone*.