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## Session 37TS

### Influencing Without Authority

**Track:** Management and Personal Development

**Moderator:** CHRISTOPHER D. RUCKMAN

**Instructor:** TERRY TESCUŁA†

**Recorder:** CHRISTOPHER D. RUCKMAN

*Summary: Are you responsible for the completion of work that requires the assistance of people you have no authority over? How do you get things done if you're not in charge and can't do it all yourself? Do you have peers, project team members, and at least one "boss" who impacts the results you are able to achieve? To be more effective, how can you enlist the help of others who do not report to you?*

**Mr. Christopher D. Ruckman:** I'm with Lincoln Financial Group from Fort Wayne, Indiana, and I'm also a member of the Management and Personal Development Section Council, which is sponsoring this session.

The Management and Personal Development Section, if you haven't already heard, has as one of its objectives the goal of bringing sessions such as "Influencing Without Authority" to the actuarial membership as part of our goal to broaden actuarial topics to include managerial, general business, and interpersonal skills, which can sometimes be overshadowed by the technical nature of our profession. So if you're not already a member of the Management and Personal Development Section, please consider sharing with us your ideas, especially with respect to ideas for future sessions that you might be interested in hearing on a particular topic.

Today, we're very fortunate to have Terry Tescula with us. Terry is a training consultant for Training Solutions Group, which is also in Fort Wayne. Terry has more than 20 years of experience in the training and insurance industries working on both the design and the delivery of adult training programs in both the corporate and the consulting arenas.

**Ms. Tescula:** As Chris said, I've been training, designing, developing, and facilitating for 20 years. We'll be moving pretty quickly. If you have questions on the information, feel free to ask as we go along. A lot of this is figuring out more about you and your style. How many people have ever done a DiSC-style assessment or some sort of other style assessment to tell you what kind of style you are? OK, a few of you have. So you know what I'm talking about.

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†Ms. Tescula, not a member of the sponsoring organizations, is a Training Consultant for Training Solutions Group in Fort Wayne, IN.

There are lots of different styles. When interacting with other people, it's really good to know your style. When you're interacting with someone else, how do you incorporate that? I'm threading that throughout my presentation because really what we're talking about, again, is working with people. My expectation for you is that you'll participate. I'll give you information and then I'll turn it back to you to figure out where you're at on some of these topics. I'll ask you to talk to a neighbor and do some of these activities.

What we want to be able to do at the end of this session is understand the power of collaboration—working with other people, their perspective, your perspective, and how we work together. Also, be aware of your own personal strengths. A lot of times we don't realize just how we come across when we're talking to another person or working with other people, whether it's via the phone or in person. There are perceptions about everything whether you're looking at somebody in the eye or they're looking you in the eye. Can you trust them? These are the sort of things that go along with the influence and with that relationship building.

Also, be familiar with goal setting. I'll talk about the "smart technique" to make sure you have smart goals. Learn techniques and tools to influence others. That's the big thing; influence others. I'm trying to get the basic needs. Is the water right? Is there candy on the table? Is the temperature in here right? A lot of times it's just some of those basic tools that we need.

And also, lead by example. You are the model, and you are constantly modeling. If you have little children, you know what I'm talking about. The first time you say a few words you shouldn't you hear them saying them. In our household, I have three brothers who visit, and sometimes they say things they shouldn't. We model all the time whether we think we are or not, so keep that in mind.

And also, we want to have fun. So feel free at any time to ask if you want examples, situations, or if want to hear more from the group. All of you have great skills. There are situations that a lot of you have in common, so we want to make sure that we get to share that.

Let's talk about the power of collaboration. Why is it important to collaborate with other people?

**From the Floor:** To get more work done.

**From the Floor:** We don't have all the answers.

**Ms. Tescula:** We can't be experts in everything. If I could be an expert in numbers, wow! I'd be really happy, but I'm not, so I find somebody else who is. What else?

**From the Floor:** To build rapport and enthusiasm.

**Ms. Tescula:** Right. Build rapport and enthusiasm. You're trying to motivate other people. If you can, get other people to understand the big picture. Adults really want to know the big picture. What is the end result? What is this new product going to do? What's the bottom line for the customer? What's the bottom line for us and the company? It's the old radio station, WIIFM. Anybody know what that is?

**From the Floor:** What's in it for me?

**Ms. Tescula:** 'People who you're working with want to know WIIFM: what's in it for me? So if you can answer that question and have the facts and the data present to be able to do that, you're going to engage them a lot more. You're also going to give them the data that they might be questioning up-front.

Organized effort. Now, when I work at my desktop, I have all my piles and I know where everything is. Now, the person next to me, his desk is totally clean so he thinks I am just totally disorganized and getting nothing done, and I'm thinking he's totally dysfunctional because he has nothing on his desk. So again, it goes back to that perception and being able to work back and forth with each other. But bottom-line, I can tell you in the fifth pile, the fifth paper down what it is. So it's a matter of, where am I coming from and am I organized?

But if you're working with other people and you're trying to influence them and get them to believe your facts, your data, your figures, that product, the bottom line, and they feel that you have too many piles going on, again, they're never going to say that, but that's another way that we're influencing other people.

A clear vision and purpose is really important if you're the project leader or, more importantly, if you're not. Why are we even working on this particular task, item, or project? People who are working with you are trying to understand that. If they can get on board with that it's a lot better.

The key thing is communication. What I'd like you to do is take a colored card and write the word "influence" right in the middle of the card. Now, draw six lines out from that. When you think of influence, what six words or phrases do you think of? I would like you to turn to your neighbor, introduce yourself, and share a few of these words.

**Ms. Tescula:** I'm just going to write whatever words you came up with. What common words did you hear at your table?

**From the Floor:** Persuasion.

**From the Floor:** Teach.

**From the Floor:** Agreement.

**From the Floor:** Lead.

**From the Floor:** Sell.

**Ms. Tescula:** Sell. You're always negotiating. You're always selling. You're always trying to get your ideas across. What else?

**From the Floor:** Power.

**Ms. Tescula:** Chris said control.

**From the Floor:** Enthuse.

**From the Floor:** Win over.

**Ms. Tescula:** Win over. See it my way.

**From the Floor:** Constrain.

**Ms. Tescula:** Constrain. It's amazing. We're all thinking about one word. Some of you thought the same words as other people, and some of you had a lot of different words. How about a couple more?

**From the Floor:** Play.

**Ms. Tescula:** Play. Oh, that's a big word. Part of that negotiating back and forth. Good.

**From the Floor:** Get results.

**Ms. Tescula:** Results-oriented. The bottom line. The reason why you're in business is to be profitable, to get something done. A lot of you work with the state regulators, trying to sway them to see it your' way. Again, if you can help them see it from the perspective of what is in it for the customer, that's what their point is.

When you want to work together to accomplish a goal, what kind of reactions do you get from people?

**From the Floor:** Resistance.

**Ms. Tescula:** Resistance. They're not swayed to your ideas. What else might you run into?

**From the Floor:** They're busy. They have' their deadlines, too.

**From the Floor:** I can't do it.

**From the Floor:** Put it off until later.

**Ms. Tescula:** Wait for the very last minute and get it done just in time. We're going to talk about those goals, deadlines. Who's responsible for what? Who's on first?

**From the Floor:** Let's do it my way.

**Ms. Tescula:** Do it my way. That's more of a way of just being in control. It goes back to controlling versus collaborating. When you're collaborating, you need to get that dirty laundry out on the table, and you have to agree to disagree. When it comes to collaborating, it's good to have some ground rules right up-front and say, "You know, we need to agree to disagree." And you have to not take things personally. You have to agree to that, too.

You're telling me to have work rules. That sounds childlike, but it's so true. Every time I think I can get a group of people together and not come up with just a few meeting rules, it does not work. But if you come up with just a few rules, it indicates we're here to get the work done.

Let's say Rick is talking about something important, but it's not what we want to talk about. You can put that issue in the parking slot. Then when you say, "You know, Rick, that's kind of related to this issue, however, not exactly what we need to be discussing today. Let's put that over in the parking slot and we can get back to it this session if time permits, or put it on the agenda for the next time we get together." That helps people to stay focused while you're working with them. If you are in a one-on-one or group meeting, it can be the same thing. It doesn't always have to be a big group meeting.

It's really important to figure out who is your leader. A lot of times you might be the project leader. Maybe you are the leader, but make sure everybody knows who is the leader. If you're not the leader, you can still be an influence. You can ask, Who is it that we go to if I need more information? Who's the one who's going to get the barriers out of the way? So if you're not the leader or you're not the person in control on some of these issues, ask who is. Make sure that these items you're talking about get designated.

**From the Floor:** When you're the leader, are you talking about the person who has the authority to accomplish what you need to do, or the person who is, in fact, the driver with the most energy?

**Ms. Tescula:** There are a lot of people who you have to work with. There's that person who is in authority and who makes the final decisions, but you need to still be able to ask, "Who is that person?" If somebody else is usually driving the process, then ask, who is driving the process?

You need to be the person who states your ideas, issues, or concerns. You don't have to be the leader, but you need to share your idea or a thought and say, "We're going to come at it from this other angle. This is where we need to go." You need to be able to throw out those ideas. A lot of times it's just having the

synergy to think a little bit differently to get people influenced. This is the same thing that we were talking about before—enthusiasm, motivating, and understanding what the whole process or project really is about.

What are the deadlines if there is a project per se? Who is the driving influence, and what do we need to do as far as the project or the work that needs to get done? Where is this going? What are the time lines? And make sure that people have a focus on that.

Because if you think it's one thing and other people think it's another, perception is a huge barrier that gets in the way and really slows people down. Marketing leadership people are telling you, "Go out there and create X." So you go out and you price and create X, and the next thing is, "No, that's not what we were talking about. It was something else." Again, that's where you need to give them all the data. Help them understand the big picture and pull that together.

Have you seen the old lady/young lady picture? You look at it one way and you see the old lady, and you look at it another way and you see the young lady?

**From the Floor:** Yes.

**Ms. Tescula:** Here's the new and improved version. What I want you to do is think of looking at these pictures and see if you can find the old and young ladies. If you cannot, help each other see what people are not seeing. It takes a bit of trust to say, "I don't see the old lady", but that's OK. Let people know. Coach and help each other to see what might not be seen.

**Ms. Tescula:** Since you've taken a look at those pictures, how many people saw the old woman first? Just a few. Is there a right or a wrong answer as to which you saw first?

**From the Floor:** No.

**Ms. Tescula:** No. Is it OK if you still don't see one? You don't see one of those pictures?

**From the Floor:** I don't see anything.

**Ms. Tescula:** There you go. How do we tie perception into relationships with other people?

**From the Floor:** We don't see or hear the same way.

**Ms. Tescula:** You're looking at the same paper, but some of you are seeing the old lady first and some see the young lady first.

**From the Floor:** But what do you want to see?

**Ms. Tescula:** Ah-ha! There you go. Now, you know, I thought about taking the clues away. Now I think that would be really interesting because I think it would take a lot longer because people won't know; we don't set the expectation of what we're trying to look for. So, again, if you're trying to influence somebody, you want to influence by setting the expectation up-front. Again, it goes back to the data. What is the expected outcome, the expected result?

What did you have to do on some of these to see a picture one way versus the other way? What did you do differently?

**From the Floor:** Move the paper.

**From the Floor:** Add a lot of distance between myself and the picture.

**Ms. Tescula:** I didn't hear anybody say, "Terry, would you hold this?" But occasionally, at the table somebody will hold it across the way for someone else to take a look at it. Again, just looking at it a little differently helps. Sometimes you have to focus in on the details. You do that a lot in your day-to-day job. You're focusing in on the details. But sometimes to see the other picture, you have to focus on the whole picture. So again, when you're thinking about your work and influencing other people, are you giving just the details or are you giving the big picture? Adults really like the big picture so, again, it goes back to what I said earlier. The more data, the more information, the facts that you can provide, the what's in it for me, the why is going to help people figure that out.

Now if you want to do a little self-reflection here, think about what your strengths are. There are five categories: how are your organizational skills, how are your communication skills, how well do you deal with conflict, do you work well independently, and what are your efficiencies? What I'd like you to do is review the scale: low, medium, and high. This is just for you. I'm not going to ask you to tell your neighbor, but I'd like you to be humble. Think about your skills in each of these categories, and, if there are any items or thoughts that you might do to improve or change the way that you currently communicate, the way that you're organized, the way that you're working with other people, or people who you're trying to influence. Think about your own work and with whom you're working.

Let's talk about organizational skills. What can we do to improve our organizational skills? Think about where you're at now. Are you very organized?

It's a matter of creating files. Some of us use a 31-day suspense system where you put your information. Every day you go in and you pull out whatever is in that particular folder. It's a great way to be organized. You don't have papers all over the place. You don't have sticky notes telling you what to do.

A to do list. I carry around these little cards. I keep one of these little cards in my Day-Timer, and I put all I need to do on that list. So it's not all over the place in different ways and different methods. Now I can just write something about the particular project or whom I need to talk to or data I need to get, and I keep that

with me, and then day to day I can review it. As soon as it gets half full and I cross things off, I start a new card. It makes me feel like I accomplished something. That's another way that you can do that. A lot of times it's just prioritizing your tasks and taking the time to get that work organized.

What about communication skills? What kinds of ways do you receive or get communication or do you communicate with others? What are all the things you're using in today's technology?

**From the Floor:** E-mail.

**From the Floor:** Voice mail.

**Ms. Tescula:** But, you know, there are still a lot of people who don't like to leave messages on voice mail. Sometimes you can spend a lot of time trying to talk to someone personally. You should be efficient when you're leaving a voice mail—leave your expectations and phone number. Again, it's a great way for you to be able to have that control. Not that we're trying to dominate but you have to take charge of your time. If you're going to influence them, it's not just whenever you need that particular information or data.

**Ms. Tescula:** Those of you who write e-mails—do you enjoy this communication tool?

**From the Floor:** Yes.

**Ms. Tescula:** There are all these notes and documents and lots of e-mail. Sometimes you have to manage it as well. Communicate that you don't want the e-mails that go back and forth. Give me the real stuff. On e-mail, if you type all your text in capital letters, what do they call that?

**From the Floor:** Shouting.

**Ms. Tescula:** A lot of people are still doing that because they don't know. The person on the other end is thinking that you're yelling at him or her.

A lot of times we say too little or we say too much. So again, who are you trying to influence? What is the information you're trying to get across? What is the information you need? Communication, especially in your field with a lot of technical information is often abrupt and to the point. People sometimes need more of the why, where did you get that data, where is it coming from, why should it be this way? And that's what you could really do to give them more than just the facts. It's that people part of it.

**From the Floor:** Being technical we have a lot of jargon.

**Ms. Tescula:** A good point. The point is not using too much jargon with people especially if they're not actuaries. If you're talking to somebody who's not an

actuary and you're pushing around all those terms and jargon people may make assumptions. It is a very important point.

How about conflict? Really, conflict is good. We were talking about being a change agent. Conflict causes change. A lot of people don't like it too much, but conflict causes change. It's how it's dealt with. So you put a new item on the table and everybody's going to get upset or riled up. That's OK. You expect that. You expect that they're going to get anxious. You come back in with the expectations, the reasons, the what, the why, giving them the information that they need, pulling it together, giving them time to bounce questions or get a little rash with you, "What do you mean by this? What's going to be the end result if we do that?" It's OK.

There's a great new book out on change titled *Who Moved My Cheese?*. It's a very thin book. I read it in two hours on my way to Florida on spring break last year, and it really is thought provoking, too. So if you really want to develop your skills and you want to deal with change and conflict, whatever it is, change or conflict, that book really helps you to deal with those two skills independently and together.

A lot of people avoid conflict. That's not going to get you anywhere. A lot of people compromise. But here's where collaborating comes in. Collaborating, again, is getting the issues on the table. What are the issues? Deal with those issues. Get the data that pertains to those issues and, if you have to bring in more people, do what you need to do.

Collaborating is getting the issues on the table and really getting to the root cause of what's going on and coming out with a situation in which both people feel that they're winning. But collaborating is really getting to the root cause of what is going on versus the Band-Aid of compromising and dealing with conflict. There are a lot of different ways that you can deal with conflict.

The bottom line is that you just have to talk about it. Again, a lot of times there are people coming from different angles wanting different things, and we get into that a lot. But following-up with the data, with the results, what's in it for the customer, what's in it for you, what's in it for everybody that's involved, helps. Is it better to ignore conflict?

**From the Floor:** No.

**From the Floor:** You don't set off an emotion.

**Ms. Tescula:** Right. How do we get past the emotion in people? Sometimes one of the biggest tools that you use in influence is listening. There's a whole other assessment and class that you can do on listening. How many people in here are good listeners? There are some of us who are listening and you're telling us the situation and halfway through I go into problem solving. I have my Super Woman outfit on and I just want to go into fixing it. There's a challenge to hear everything—listen to what the issues are.

A lot of times people just need to vent and get it out. If you can, take that information, write down your questions when it's their turn to talk and you actually listen. If you are in person, it's the eye contact. Some of us have technical difficulty with eye contact. Some cultures really don't have a lot of eye contact. So you need to figure this out and ask, "Is it a culture item?" I'm not saying do the direct stare the whole time you're talking to somebody, but there's a happy medium.

There's a lot of body language that goes into influencing. If you sit directly across from someone, some people will say, "You're getting too much in my face or space." Instead, sit catty-corner. If you have a rectangle or corner table, one person can sit at the end and another sit on the other side so it's not a me-versus-you situation.

**From the Floor:** What does it mean if I'm doing an interview and the person is looking out the window?

**Ms. Tescula:** You're asking the person questions in an interview and he or she's looking out the window. They should be directing their attention to you.

**From the Floor:** Should I hire them?

**Ms. Tescula:** I cannot answer that. But I would question their personality and behavior. I would question if that person was engaged in the conversation you're trying to have. Personally, I'd think the person is disengaged and not really that interested. Does the person have the people skills that you need? That would help influence your decision. You're talking about a conflict of interest. If you're looking out the window and I'm trying to talk to you, I'm not going to feel very respected at all. So, even body language and active listening when somebody else is talking is key—let them finish; write your questions, do your doodles, or do what you have to do.

And a lot of times when I'm training, I'm walking around holding a marker, and I open the marker and subliminally I have to remember to bite my tongue and listen. Before I ask a question I wait 20 seconds. I had to train myself because if you ask me for an opinion on anything, I have one. I'm one of those kinds of people.

Going back to style that I was talking about earlier, you're in a meeting, you're trying to influence, you're trying to get them to make a decision today. We need to make this decision today. You already have all the answers in your head. You've had time to process it. This is the first time they've heard it. I call some people ponderers. They like to think about it. Even if you're in a rush, say, "You know, think about it over lunch and let's get back together at two o'clock." Give them some space. Just because you are ready to make a decision, doesn't mean they are. And if you're truly respecting that other person, building trust, building a relationship, you need to give him or her that time.

**From the Floor:** We are always in a time crunch.

**Ms. Tescula:** You bring up good points about how much time you can give them. You deal with time frames. If you don't necessarily have that much time to think about it in a meeting, make sure they get an agenda or pre-note so they can think about it prior to the meeting.

They just heard about it now and they have to give you a quick shot answer. You're not going to influence anybody that way. They're going to think you're a total dominator. Forget the controlling. You're a total dominator, and that relationship of building trust and working that out is not going to happen. So you need to plan out as best as you can to allow time for a decision. I know you don't always have the amount of time some people want. "No, you have overnight." "No, we want it the first thing in the morning." But those are different tools that you use with your style to be able to do that.

Working well independently is again, setting your priorities, getting your tasks done, what issues you have, knowing what work you have done, using your Day-Timer, using your problem highlighter, or whatever tools you're using to keep organized. Can you be self-disciplined and get that work done? If somebody has to constantly follow up with you or you're constantly following up with that person, that's not a good influencing factor. So part of this is totally being organized on your part and knowing the big picture, being able to give the facts, and being able to communicate and listen.

Right now, what I'd like you to do is find a partner in this room. You might even have to get up out of your chair and go find somebody. For the first two minutes one person is going to be the talker, and can talk about anything. Talk for two minutes. The other person will listen. He or she can write questions, but can't say anything.

If you're listening, you're totally listening. If you want to write something down, go ahead, but you're doing the active listening. If you're sitting down, you're nodding, so you're practicing this skill. You might say, "Terry, this is really goofy," but you may have never thought about this before.

Next, figure out who's going to talk first. That's important. Who's influencing first? One person talks for two minutes. The other person listens.

(Two minutes later.) OK. Stop. The first person is done talking.

Now we reverse roles. The person who spoke before is now going to listen and vice versa. (Two minutes later.) Good job, I must say. We even have people who stepped outside of the room to have their conversation.

It's much easier to engage in your conversation if you're doing what? What were some of the things you saw other people doing as you were the listener?

**From the Floor:** Taking notes.

**From the Floor:** Raising their eyebrows.

**Ms. Tescula:** Those are clues indicating they were listening. This probably wasn't a topic to turn red on, but sometimes when you're talking to somebody, if you're truly listening and watching, you'll see people turning red. That's a sign they're a little tense. You need to watch that. What else did you see?

**From the Floor:** Nodding their head.

**Ms. Tescula:** A lot of head nodding. But this is what's happening. If you are truly a good listener and you feel yourself squirming, get that pencil out, write your notes, doodle, do what you need to do, but truly give them that intensity when you're working with other people because then they're going to know that, number one, there's respect, you're trying to build a relationship with them and vice versa. You want them to do the same thing as well. Comments or questions on that activity?

**From the Floor:** The talking seemed a lot longer than listening for two minutes.

**Ms. Tescula:** That's a good observation.

**From the Floor:** Talking is easier.

**Ms. Tescula:** It's easier to do the talking. When you're talking you're in what?

**From the Floor:** Control.

**Ms. Tescula:** Control. I always say as a facilitator and a trainer, While I'm doing all the talking, you're not necessarily doing all the learning. That's why I turn it back over to you because it doesn't just come from me. Only 15% of the people get it or retain information when you tell them something. That's why sometimes you might give somebody a formula. If you were working with me, well, let me tell you, I'm a very kinesthetic learner. I need to see it. I need to hear it.

If you're working with somebody and you're hearing yourself say to a colleague, "I've told them five times. I don't know why they're not getting it," they're not getting it because they don't learn from just an audio presentation. So if you're sharing information whether you're in a group setting or whatever, get out your paper. If you're just one-on-one, have your doodle paper. Get some colored markers. It gets creativity going. Do some of those things because that way you're going to engage the other people in that process more, and it's not just you throwing everything at them. There are many other ways that you can get them interactive in that process.

**From the Floor:** You're right. I don't learn by just hearing the information.

**Ms. Tescula:** Know that you need to work and think it out. That's a really good example. What is your first name?

**From the Floor:** Jill.

**Ms. Tescula:** Jill. When talking to Jill, give her paper and pencil . She needs to work it out. She needs to see it. I've had people hand me paper and pencil just to slow me down. Can you draw it? Draw pictures. Tell me what you're saying in pictures. Slow down a little bit. Some people need to be able to read it and hear it. It's really good to know your learning style and to know what other people's learning styles are. We have a whole session for that, too.

I want you to know that there are lots of tools that you can use to assess your learning style. If I train just in my style, I'm missing out on three other groups of people during that session. So that's why I do different kinds of things throughout sessions so that at some point in time, everyone is engaged in their style. You're all engaged the whole time, but some are more engaged at different times because it is their style.

When I say just take a couple of minutes and write down your ideas, there are some people who love that and other people who say, "Oh, can we move on, please?" When you're working with somebody else and you're trying to influence them, figure out whether they may be a thinker or if they need to do the talking and you need to do the listening? Figure out who you're working with and what their styles and needs are as well as yours, and be sure that you're not just totally dominating.

Here are five elements to get things done. Defining the purpose, making sure people are clear on what we are talking about, what's the plan of execution, how we are going to get the information, and experiment. Sometimes it is pencil and paper. Maybe it's LEGOs. Who knows what it is? But, get some different things going. What's the commitment? Who has the ownership? Who is part of this process? Who's going to be doing what? And always collect feedback and give support.

A lot of times I ask, When's the last time you got good feedback on how you're doing in your job? When's the last time you got some negative feedback on how you're doing in your job? We need to know that. And as an influencer, you need to make sure, whether it's good or maybe a little bit more negative information that you need to share with somebody else, that you are able to do that.

Start with yourself. Develop your personal plan and sharpen your skills. We talked about whether your skill level was low, medium, or high. You need to figure out where you're at and what you need to do to improve. Again, formulate a purpose that motivates and guides you. What is it that you need as well?

If you're the influencer, what's going to keep you going? Do you have everything you need? Think of it in terms of "in order to" instead of "because." In order to accomplish X, this is what needs to happen. Not just because that's the way it's always been. Sometimes you're trying to influence those people. Then it's your job to get the details, the facts. Help them to see that picture. It's going to work

this way if we do it one way. It's going to work this way if we do it the other. There's a bottom-line difference between the two.

You need to set goals: short-term, mid-term, and long-term. Set the criteria. Now how are you going to evaluate or measure when you're done? How are other people going to be able to give you feedback? Were you able to give them the information they needed? You're looking at how people are working, how you are interrelating with other people, and how you are getting the work done.

Get some feedback from people who you work with quite a bit. Find out where your skill areas are that you need to develop and work on those. You can always go home and ask a significant other, "How well do you think I listen?" Then ask some people at work the same question to get another perspective. Again, it comes back to—where you are and where you are focused.

One, inspire collaborative efforts. Members of a group will understand the purpose if they help create it. Two, a muddy purpose can be a hindrance. As the number of people working together rises, the importance of a clear, commonly understood purpose increases geometrically. Three, help to formulate objectives. This increases commitment. Four, define a purpose that will keep everyone aimed at achieving the end result, instead of working at cross-purposes.

Inspire collaborative efforts. This is also idea versus telling. What if we did this? What if we did that? What is your opinion on what we should do with this or that? Again, the more you can get people to buy into that process, the more they're part of the project.

A mighty purpose can be a hindrance. How are we going to measure what the end result is? Helping to formulate objectives increases commitment. If people really know and if you know, you can influence them. Do you totally know what you're trying to get out of this situation that you're working on? So I'd say, let's have smart goals.

Goals need to be specific. So anybody who looks at a one- or two-line statement can tell specifically what we are talking about.

Measurable. Are you just getting the rates calculated in this first objective? If that's what you're doing, you want to get the rates calculated, whatever the product is.

Achievable. Do you have the skills to do it? People sometimes get confused between the "A" and the "R". Beside the "A", you might want to write or remember skills.

Realistic or reality-based. Do you have the time yourself to do it, or are other people working on this? I also call it resources.

Time-based. Every goal should end with a date for completion.

So when you look at one- or two-line objectives, anybody looking at them will know what you're talking about and know the deadline. It goes back to the big E word, expectation. What are the expectations you need to have done?

Sometimes we need to organize ourselves a little bit more, and you can do that by making sure that you have smart goals. Comments on goal setting?

**From the Floor:** Being flexible.

**Ms. Tescula:** For yourself there's innovation. How would you change that? Let's go back to the group. If your focus is innovation, think outside the box. We always say we want to do something a little bit differently. We'll be one step ahead. How would you change that?

You have to look for short time periods because a lot of times you set some goals and if they don't happen in a short amount of time, then everybody gets frustrated and they come back in and ask, "What's happening here?"

**From the Floor:** There are times where they're doing something that hasn't been done before. For instance, you're doing a new product line.

**From the Floor:** So they're not really quite sure what to do.

**From the Floor:** So there's a place where innovation requires setting goals on those decisions that need to be done and there is no road map to follow.

**Ms. Tescula:** But you have some sort of an idea of what this new thing should look like. Are we talking about a ball that is squishy and has many tentacles sticking out of it, or are we talking about round foamy balls? Somehow there's an expectation of what it is that you're trying to get done.

Maybe you're trying to set variable rates. You work with annuities. Are you trying to get variable rates, or are you trying to have flat rates with your new type of contract? What is it that you're trying to do? Include different formulas. Is it fixed or is it variable? Now you want to come up with something totally new, and you want to add an indexing feature from the market. So, again, what you can do then is put some of the specifics in it. This is where we're headed. So anybody looking at that has an idea of where you're trying to go.

A lot of times to be innovative, what you have to do is get in a room and brainstorm and get people together. . Even on your own desk to have stress balls or Slinkys sometimes helps to think outside of the box.

A huge tool that you can use when you're trying to influence somebody else is not to use a leading question. "Don't you love my black suit today?" Also don't have just direct questions that require a yes or no response. Use open-ended questions to sway somebody who maybe is a little stern in their ways and has always done it one way: So how would you do it differently? What would you see the end result

to be? How would it be different from what I've shown you? How, what, when, why? Use those open-ended questions and have them give you some information back.

Also, you can have way too many details. You have your detail people, yes, but you can have way many details to see the big picture.

**From the Floor:** How do we get it started?

**Ms. Tescula:** Sometimes it causes synergy to at least talk about some things like this. Maybe you don't come out with something that's totally finite, but a lot of times it's the conversation that people have about what the end result might be. That's going to be even more important than coming out with that specific goal. And sometimes you know that by whom you're working with and who your products are for. There's not a formula that you can use for every group of people or for every person or product. It's just a matter of putting things on the table. It's a matter of really doing a lot of thinking out loud and asking those kinds of open-ended questions to get people going.

**From the Floor:** What if I cannot get input from people I'm working with?

**Ms. Tescula:** What you can do at that point is to give everybody colored cards. What you're talking about is to get the big picture. What are we thinking about? What's this new product going to look and feel like? What are some of the features that go with that? Use the cards to get everyone's input, then review the cards and process them as a group.

A lot of times what we have to do is just get people thinking and get them synergized, and get energy and motivation in that process. Some people are good at verbalizing that information. Some are not. So you can use cards. Have the people write their ideas on the cards and then put those up and storyboard with them. You can prioritize. You can have people vote. Again, it's more of the vocabulary and the processing of the information that gets you to be more creative and do some of the brainstorming differently. There are a lot of techniques for that, too, that allow people to open up and get outside of their box a little bit more.

If you knew that you had to come in here and talk to somebody for two minutes or just sit and listen and you couldn't say anything, you'd probably say, "I'm not going in there." But, sometimes we have to stretch. I always say we have to get uncomfortable to get comfortable. That means you, the influencer, need to get uncomfortable. You're going to go places. You're going to deal with conflict. You're going to talk with people. You're going to deal with information you totally don't know a lot about. You have to get uncomfortable to be more comfortable to influence other people to even think differently, to be innovative, to think outside the box. Sometimes we have to stretch ourselves to be able to do that.

A lot of times we're working with people who we're trying to influence, and they ask, "Well, you know, it looks OK to me. Why do we need to change anything? Somebody else is going to take care of it. I don't have time." So what do you do?

Let's say you're working on a new product and features are not incorporated into the pricing structure, what do you do? You're not the one who's running this whole game. You're just part of the process. How can you influence the people who are putting together the information and building the process? Do you kick back and say, "Somebody else will take care of it." What do you do?

**From the Floor:** Let the leader know.

**Ms. Tescula:** Good. What else?

**From the Floor:** Personalities sometimes get in the way.

**Ms. Tescula:** Yes. Was it incorporated? You sometimes get into some of those people issues. That's why we listen. Go back to brainstorming or idea-generating. Write down everybody's idea and put it in their words. If you are writing things down and you're putting it in your own words, you lose some of that trust and that relationship building. What else can you do to get people in that process?

**From the Floor:** Expectations.

**From the Floor:** Talk about options. You don't have to have all the answers, but provide options or choices.

**Ms. Tescula:** Good. What are other choices? What are other options? What are other ways we can get this done? Again, ask other open-ended questions. Of course, you might be like me. You have an answer for everything. But open it up first and see what other people are saying. And sometimes you literally have to hold the marker or bite your tongue. You have to practice this.

This is another skill you can do in the car. Just think about it. If I asked a question and didn't say anything for ten seconds, I'm reminding myself not to say anything for ten seconds. If you're in a meeting and you want to provide all of the information, that's more dominating—instead put out an open-ended question and influence more by sitting back and letting other people get engaged in that process. All of these are common-sense factors that lead into the process.

The planning process. Do we have our act organized? Do we have all the data? Do we have all the facts? Do we know what we're trying to get to happen? Who's doing these tasks, these shared responsibilities?

What can you do or say? This is where you're influencing people. Report the facts, put in the data. You're not going to just say, "Oh, well! It's totally accurate all the time." You might have a certain amount of assumptions, right? What you want to do is get the facts and the data. What's the direction? Clarify. Influence by asking

what are other people's questions. If you're not open to that input, again, you're not going to get it and you're not going to be as powerful in your influential mode.

Propose the next step or ideas. Ask for their input. Of course, you have your own. You came prepared. You're ready. You can share. Also, use people's strengths. Figure out what other people's strengths are that you're working with. If they really like going into details and writing things up and getting that word and grammar just perfect and they want to do that, let them do it. Use complimentary skills. You don't have to be able to do everything. But you do have to say, "Well, maybe this isn't quite what we're looking for in order to submit it." That's dealing with the conflict aspect.

Assemble your thoughts. Take a risk and share your concerns. We're going to the edge a bit. They might say, "Oh, we don't like it," and really push you back a little bit. That's OK. You're going to have your information and your reasons why you came up with that plan to begin with. You also want to give input and direction. I'd say be the guide on the side, not the sage on the stage. Help and cope. You don't always have to be that controlling person we talked about. You're trying to influence people, but it doesn't have to be all your way. So it's a matter of getting everybody's ideas out on the table.

**From the Floor:** How do I get other people involved?

**Ms. Tescula:** Use other people's strengths. I use that with the proposed next step and/or ideas. Help build that trust in the relationship.

Again, look at the big picture. What are the data? What are the goals? What's missing? What are the underlying causes? A lot of times we don't get into underlying causes or even keep track of what the issues are. You have to have a place where you can follow the issues. You're influencing other people by having answers to this information. Sometimes you're in the leadership role and sometimes you're not. But you're able to influence other people by asking some of these questions and making sure that this is part of the process.

So what is the next step? Watch your own biases. We all have them. Become aware of what your biases are and how much they may be getting in the way for other people. So watch for either your own or other people's traps. Work, listen, and watch. Step out of the box. Get creative. Create enthusiasm. What are different ways that we can get new ideas? Think about who should be involved and how you're going to stimulate other people. Lead by example. All these things have key aspects to how you're influencing and working with other people.

We talked earlier about commitment. Let other people get involved and give their input. People who you're influencing have their opinions and you have yours as well, but there's commitment when people feel they have had input and influence on the project. What's your motivation? What's other people's motivation? Think about what they want to know. What's the bottom line? What's the end result?

And what do you want? You should have both sides as you're working with other people. It's going to help you better influence because you know the big picture.

Are the tasks assigned appropriately? Does everybody know what it is we're trying to accomplish? If we're trying to create something totally new and different, make sure everybody knows we're doing something totally new and different. You know, we might fall down. It might be the perfect thing, but here's our range. Here's what we're able to do and what we're trying to do.

Recognize effort. If they've done their part and they've come through on time, tell them. It doesn't have to be major highlights, but you're influencing other people with communication and feedback.

Give your feedback. Stress yourself. Make yourself sometimes uncomfortable. You'll find that once you get uncomfortable a couple of times dealing with conflict, the next time it comes up you're just asking an open-ended question. So how would you see it differently? Let me hear it from you. Now, sure you might not hear what you want. Maybe there's some sort of collaborating effort there, but it's just not one way or the other as your end result. Support other people. Collaborating and supporting other people is the bottom line.

Getting into feedback and support. This is for you to think about—what are the task processes and responsibilities that can be shared? If you're working with somebody and trying to influence that person and you're trying to get more input, what is it, and who else should be involved? How can you support each other? Again, maybe you have the information, but you have somebody else working on it. How can you be that guide on the side?

Creating a culture and climate that supports people who are working on this project. How are we going to get this done? What is the end result we're trying to get done? Again, if you know that and you're setting up the expectation up-front working and using those people skills, coming out with that, it's going to give people a much better picture in the beginning and in the end. Sometimes it's not totally easy working through the process, but it's getting the information on the table. It's getting all the issues on the table. Figuring out for the customer, for you, and for the company what's the best thing that can be done.

Behavior processes that you'd like to improve overall. A lot of times I tell people, give yourselves a couple of days to think about what I said today. That gives you time to ponder if you're that type of person. When you're working on these types of people skills, you really have to look at yourself, and that's what I asked you to do earlier in the session, and figure out where those areas are. What would you want to address and what would you work on? How would you do that differently? Find resources. Find people who you think do it well. We're talking about skills: listening, processing, asking open-ended questions, being able to write things down if somebody else is saying it and not just do it all.

Now I'll turn it back to you. What is it that you will walk out of here with today? Look back through your notes. What is it that you will be able to apply most to help you influence other people?

**From the Floor:** Define the big picture/project.

**From the Floor:** Review my own style.

**From the Floor:** Use open-ended questions.

**From the Floor:** Not avoiding conflict.

**Ms. Tescula:** Not avoiding conflict. How might you try that differently? If conflict is an area you decide you want to work on a little bit more, what might you do next time with conflict?

**From the Floor:** Use open-ended questions.

**From the Floor:** Be involved in the problem-solving process.

**From the Floor:** Understand where people are coming from, their perspectives.

**Ms. Tescula:** That's right. A lot of times that's getting to the root cause of problems; that's another whole issue—the problem solving. Ask why five levels deep to get to the root cause of what's really going on with the issue. A lot of times we just put a Band-Aid on. We just cover things up and we compromise and move along.

But if you can stick with that conflict and stay with it. Keep asking why. Why is this an issue? Why do you have an issue with that? Sometimes it's a personality issue. Sometimes it's just the way you gave them the data. Sometimes it is true that they don't fully like the calculation of the end result. But you need to hear that. You need to be able to have some discussion to be able to influence and work back and forth on that.

What else will you walk away from this session and apply? To ponder, to think about, to try out? As I said earlier, a lot of times it's an intangible item that we're talking about, and you want to be able to have it wrapped in a nice little neat box and say, "OK. Here it is." I always tell people there's no magic dust when you're talking about people issues. It's a matter of where we're coming from. Do we have our expectations? Do we know what's going on? And how do we influence and get involved in that situation? Did we ask those open-ended questions? Do we have the data? Do we see issues? Are we looking at the big picture?

Just like the old woman/young woman picture. Are we focused just on the details, or can we pull ourselves back and get a little uncomfortable, and look at the bigger processing of the whole picture? Sometimes that's even questioning your own

processing. But do we truly do that? Do we truly get to that point so that we can, in fact, be able to do that?

That's' what I challenge you all to do. I challenge you the next time you are thinking "I'd like this person to think about this a little differently," or, "I'd like them to be able to see it my way"—ask yourself some of the key questions that we went over. Do they even know what the purpose is? Are there any clear objectives written so that we all know what we're trying to obtain?"

I want to thank you all very much for having me here today, and to be able to share some of these people skills and influencing without authority. I challenge you to get uncomfortable to be more comfortable with the influencing process as you go forward.