PLANNING

Establishing *Goals and Tactics*

B. Kim Barnes
THE INFLUENCE GURU

Before you influence anyone, answer one question: how will I know that I have succeeded? Five criteria for a goal worth pursuing, and how to pick the tactics that get you there.

Setting influence goals

In any influence situation, it is important to establish your goal ahead of time. First you need to be clear in your own mind about what you want to accomplish through influencing the other. This goal, together with your understanding of the current state of your influence relationship and context factors, will enable you to choose a useful approach and stay on track toward achieving the results you want. The question to ask is, "How will I know that I have succeeded?"

> CRITERIA FOR INFLUENCE GOALS
>
> An effective influence goal must be clear and compelling. That means it is **flexible**, **observable**, **courageous**, **useful**, and **supportive**.

The examples below illustrate the criteria. Of course, there may be influence situations where the "bad example" is perfectly appropriate. There are few hard and fast rules in influence.

> *Nothing contributes so much to tranquilize the mind as a steady purpose, a point on which the soul may fix its intellectual eye.*
>
> MARY WOLLSTONECRAFT SHELLEY, 1818

Flexible

Able to be adjusted to context issues. Can be altered, if the context requires it, to another way of meeting your underlying needs.

FLEXIBLE

On-line access to the sales information system, or anything that will get me the current sales figures on a daily basis.

INFLEXIBLE

On-line access to current sales information.

Observable

Results can be noticed during the influence opportunity.

OBSERVABLE

John will agree by the end of our meeting to take on the responsibility for coordinating with the vendor.

NOT OBSERVABLE

John will be more interested in the project.

Courageous

The influence goal should be ambitious, possible but a stretch, in order to make sure that the effort and risk involved is worthwhile. If it does not require some courage to achieve, you are probably not taking full advantage of the opportunity.

OPTIMISTIC

Kumar will commit three people to my project.

FAINT-HEARTED

Kumar will agree to consider participating in my project.

AUDACIOUS

Kumar will commit his entire budget to my project.

Useful

Will satisfy your need completely, and is focused on your most important need: the reason you are influencing the other person.

MEETS THE UNDERLYING NEED

Megan will agree to increase my budget to pay for the resources I need.

NOT FOCUSED ON THE UNDERLYING NEED

Megan will admit that she was unfair in allocating budget money.

Supportive

Influence goals are short-term, but to be effective they need to be aligned with longer-term goals. Otherwise you will be working against your own interests.

ALIGNED

Peggy will agree to take up our issue with the Executive Committee.

NON-ALIGNED

Peggy will agree to go around the Executive Committee just this once.

Developing a clear and compelling influence goal enables you to focus on the result and whether you are getting closer to it or further away. If you are not moving toward your goal, you will probably choose to take a step back (temporary disengagement) or move to a different approach.

Determining tactics

Certain exercise equipment works to strengthen specific muscles. Similarly, certain behaviors are useful for specific influence tasks. When planning how to achieve your goal, think about what you intend the behaviors to accomplish, and how they will help you get there.

Start by looking at the eight tactics from the influence model and ask yourself: as I think about how to achieve my goal, which of these are the most important? Usually, there will be one or two expressive and one or two receptive tactics that stand out.

> *It would be difficult to exaggerate the degree to which we are influenced by those we influence.*
>
> ERIC HOFFER

Tactics for expressive influence behavior

Expressive influence behaviors help you to send a message to another. You may do that by simply communicating the desired action (**Tell**). You might want to convince the other to commit to action (**Sell**), or it

could be important to give the other a vested interest in taking the action (**Negotiate**). You may be interested in creating enthusiasm and alignment for taking the action (**Enlist**).

Tactics for receptive influence behavior

Receptive influence behaviors draw information or ideas from others and gain their involvement or commitment. You may need to get information (**Inquire**) or learn the real limits of someone's thinking (**Listen**). It could be critical for you to build trust and increase openness (**Attune**) or help the other person to take action or responsibility (**Facilitate**).

Being clear about your tactical intentions enables you to choose appropriate behaviors which can be used in a logical sequence.

An example

SITUATION

You are a leader for an important project that is behind schedule. You are getting a lot of pressure from your manager to bring it in on time. You need a key engineer on the team to work extended hours and weekends if you are to have a hope of completing it by the deadline. You hope to influence the engineer to do this, but know it will be difficult because of his or her family responsibilities.

Goal: the engineer will commit to completing the project by the deadline.

Tactics:

- **Tell** — communicate the desired action.
- **Negotiate** — give the other a vested interest.
- **Attune** — build trust or increase openness.
- **Facilitate** — get the other to take responsibility for action.

Remember that your goal is the end and your tactics are the means.

Once you are clear about your influence goal and tactics, you will be ready to choose the most appropriate behaviors.

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Founder of **The Influence Guru**, Kim Barnes is a coach, facilitator, and author with more than forty years of experience in leadership, influence, and organization development. She was a founder and, for many years, CEO of Barnes & Conti Associates, and developed or co-developed programs including *Exercising Influence*, *Inspirational Leadership*, *Intelligent Risk-Taking*, *Consulting on the Inside*, and *Managing Innovation*. She is the author of six books, including *Exercising Influence* (Wiley) and *Building Better Ideas* (Berrett-Koehler). She works with enterprise companies, government agencies, small businesses, and individuals from the San Francisco Bay Area.

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