

Influence Planning Tool

Before going into any high-stakes conversation that requires influence, use this simple tool to make sure you have your bases covered:

Action Step	Notes	Key Mistakes
Set a clear goal		Going in with one's gut instinct instead of a clear goal; setting a fuzzy goal; setting a goal that is too ambitious for one meeting; setting the wrong goal for the situation.
Assess the situation		Failing to consider ALL of the reasons, incentives, and factors that can influence the other person in this situation; failing to consider the other person's motivations.
Choose the right approach		There are at least FOUR strategies that work in different situations, yet most leaders rely on only one.
Structure the approach		Many leaders wing it, without planning out how the conversation might go, the best opening, how to respond to objections, and what to do if presented with new information.
Plan for the worst		Some leaders stay in a meeting that is going poorly, instead of taking a break; failing to plan for what can go wrong.
Rehearse		Rehearsing a high-stakes conversation with a coach can improve results exponentially; failing to rehearse reduces the chances for a positive outcome.