Alexandra Clark explains how to be a strategic influencer

Subtle but important changes in the role of technical managers mean they are now expected to work across organisational boundaries, innovating and collaborating with a wider range of colleagues, partners, customers and agencies than ever before. Managers are *expected* to find common ground and move initiatives forward with colleagues who have quite different agendas, perspectives and cultures.

Over the past 10 years the environment in which innovation takes place has changed. Ten years ago companies were moving *towards* virtual teams, multi-functional project structures, strategic partnerships, and so on. Now, all of these organisational forms are the norm.

What's more, ambiguity, change and scarce resources are now an integral part of managers' daily lives. A great deal of analysis has been written about this. Far less, however, has been written about the organisational politics that inevitably accompany them – conflicting agendas, game-playing, reduced levels of trust and openness. Virtually nothing is written about the substantial challenges this political environment represents to managers innovating across organisational boundaries, namely:

Agreem

- it's a real struggle to get things done, and
- getting agreement and alignment around initiatives is tough at best – and a nightmare at worst.

The task of technical leadership has become far more challenging than is implied in those benign words contained in most job descriptions: 'works effectively with internal and external partners'.

STUMBLING BLOCKS

We all know that delivering new initiatives, products and services has never been more critical. Yet most of the stumbling blocks and barriers to successful innovations are to be found within organisations. In fact many of us have worked in organisations where it was a miracle if anything ever got out of the door! In complex, political environments, building the necessary agreement and alignment to get effective implementation takes thoughtfulness, patience and lots of determination.

Consider this scenario: You're trying to move an initiative forward. You find it relatively easy to achieve agreement – everyone has sat around the (virtual) table and thrashed things out (sometimes over many hours or even days). In the room, people agree; they sign off on the decisions that have been worked out. Yet, back at the ranch, things never seem to get implemented. Why?

ent
or alignment?

- Maybe what made sense in the meeting doesn't quite make sense afterwards, so people go off pursuing different, conflicting paths (see fig 1);
- Perhaps, after hours of circular discussion, the least contentious way forward looked extremely attractive. However, transforming mediocre decisions into reality doesn't energise anyone into action, so implementation simply doesn't happen;
- Maybe some never intended to implement. Agreeing was simply a diversionary or delaying tactic that played to their agenda of maintaining the status quo.
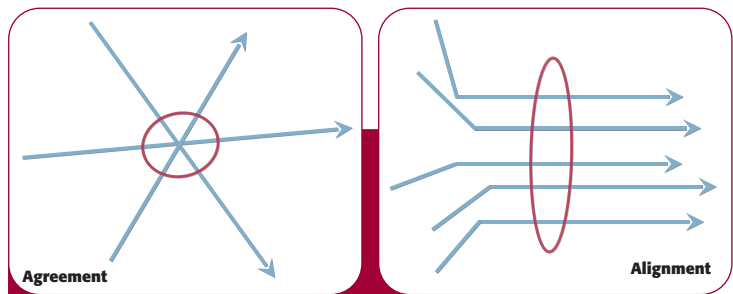
Whatever the reason or reasons in this scenario, →

Agreement

Alignment

Fig 1: Getting the agreement of everyone involved is easy, true alignment which involves transforming agreement into action isn't

> ❝ **It is strategic influencing skills that differentiate managers who shape the agenda from those who follow it in complex organisations** ❞

agreement was clearly reached but true alignment wasn't, so nothing happened. The differences between gaining alignment and agreement are quite profound and present a significant challenge for most managers in global organisations.

ACHIEVING ALIGNMENT

Gaining alignment demands strategic influence, which requires an approach beyond what we would call tactical influence, which is the handling of face-to-face interactions. (Tactical influence is critical within conversations – it helps individuals and managers be more assertive, to 'engage' and 'channel' people towards an agreement. In fact, in the scenario outlined above, it is tactical influencing skill that probably helped to bring about any sort of agreement at all.) What tactical influencing doesn't do is help managers work effectively in complex, political environments where:

- what is *said* may not be what is *meant*;
- *who* you talk to may be as important as *what* you talk about, and;
- *who* you know may be as important as *what* you know.

Achieving alignment is about getting people with differing perspectives:

- to explore and vigorously debate in search of the best solutions;
- to agree on the best way forward, and;
- to align behind transforming this into action.

MANAGING THE POLITICS

Today, taking an initiative forward can mean trying to influence many colleagues, each of whom has a stake in the initiative. These colleagues may be just down the corridor, or they may be on the other side of the world. They may have aligned views of the business, but, more often than not, they will have quite different agendas and perspectives. What's more, generally, they will believe their agendas and perspectives are the most important, the most critical to the business and, of course, right! They may also believe that anyone who works across traditional boundaries is a threat and not to be trusted at all.

So the crucial question is not so much 'How do I influence an individual *within* a conversation?' but '*Which* individuals do I need to influence, *when*, and *to what end*?'

In this context, getting new initiatives onto the agenda and influencing the organisation's direction, demands a strategic approach to influencing. It requires a number of approaches. Firstly, a 'helicopter view' of the business landscape – to understand who, and where, the key stakeholders are and also what their key business goals and challenges are. Then it needs the use of networks of colleagues to bring insight into stakeholders' goals and issues and, following that, intelligent navigation through the business landscape working with the business and stakeholders' goals and issues. Finally, creativity and collaboration across organisational boundaries are vital to develop higher quality solutions.

Tactical influencing skills are still important. However, in our experience, it is 'strategic' influencing skills that differentiate managers who shape the agenda from those who follow it, in complex organisations. It is managers with these skills who are able to take breakthroughs in thinking from concept to implementation, and who are therefore able to have the greatest impact.

DEVELOPING SKILLS

How do you go about developing the skills to work around these organisational barriers? Well, some people just seem to have them. They naturally develop and nurture relationships they can call on when needed, have the 'helicopter view' and pursue their agendas effectively, have a natural sense of timing – knowing when to push, and when to hold back and work effectively with conflicting agendas and build alignment surely and steadily.

Most of us, however, have to learn how to influence strategically over time. But development this way is costly! It costs in terms of lost business opportunities, wasted time, frustration and demotivation.

Many capable technical managers simply lack the skills and approaches required to have strategic influence. Yet these can be learnt. We know because we've seen it done time and time again. Do you, or your staff want to have greater strategic impact on your organisation's success? Or need to improve the ability to achieve alignment around critical initiatives?

If so, have a go at the tool opposite (see Table 1) adapted from Relay's NetWorks for You strategic influencing toolkit (www.relayconsultants.com/elearning_toolkit.php). Use it to reflect on your own, or one of your staff's approach. Reflect on specific situations, and use these to decide which answers best reflect the thinking, beliefs and approach that guide you or your staff members' actions.

THE WAY FORWARD

The questionnaire is obviously not a complete picture. However, if you score more threes across the board you may

> ❝ **The crucial question is: 'Which individuals do I need to influence, when, and to what end?'** ❞

HOW INFLUENTIAL ARE YOU?

ANSWER THE QUESTIONS BY CHOOSING THE NUMBER THAT BEST DESCRIBES WHAT YOU WOULD DO ON A SCALE OF 1-3

MANAGING THE POLITICAL PROCESS

1. When taking an initiative forward – decision-makers, influencers, stakeholders:

1	2	3
I know the key decision-makers but am generally unsure about who they listen to or where the competing agendas may lie.	I know the key decision-makers and some of the other stakeholders.	I make it my business to identify all the key decision-makers and stakeholders.

2. When taking an initiative forward – behind the scenes relationships (who listens to whom, cliques, friendships, conflicts, etc.):

1	2	3
I have little insight into the relationships between the different stakeholders.	I have good, current insight into the relationships between some of the different stakeholders.	I have an excellent grasp of the current relationships between all the different stakeholders.

3. When taking an initiative forward – my understanding of the objectives, priorities, and issues facing key stakeholders could be described as:

1	2	3
Limited – I know my business goals, and focus on these.	Reasonable – I know the context and business goals of some of the key stakeholders.	Excellent – I make it my business to understand the context and goals of all the key stakeholders.

MANAGING AND UTILISING MY NETWORK

4. I would describe my network as:

1	2	3
Focused – mainly comprising people within my function.	Broad – I know at least one person in each of the main parts of the business.	Broad and deep – I have strong relationships across the business with colleagues in operational and senior positions.

5. I would describe how I manage and develop my network as:

1	2	3
Ad hoc – relationships develop when the opportunity arises. Sometimes they continue, often they weaken over time.	Conscious – relationships develop when the opportunity arises. I actively maintain them once established.	Proactive – I seek to develop specific relationships. I actively maintain them once established.

WHAT I BELIEVE ABOUT INFLUENCING

6. When initially taking an initiative forward I believe:

1	2	3
It's important to be thorough, to have all the facts lined up, to have a complete proposal.	I need to have thought through my initiative reasonably fully *and* expect some joint problem solving with others.	I need be able to articulate the *essence* of my initiative, so I can engage, and develop it further, with others.

7. When taking an initiative forward I believe:

1	2	3
It's important to be acting within my direct area of control – failure will damage my credibility.	It's important to take some risks. You can't make an omelette without cracking some eggs!	It's important to take risks in proportion to the size of the opportunity *and* my credibility to take it forward.

INFLUENCING PROCESS – A STRUCTURED WAY FOR MOVING INITIATIVES FORWARD

8. When taking an initiative forward:

1	2	3
I rarely think through and articulate the main risks – they will only put people off the initiative.	It's important to identify some of the risks, so that people know up front what might go wrong.	The risks need to be explicitly identified and managed, for example, through use of pilots, to gain buy-in,

9. When taking an initiative forward:

1	2	3
I believe there is one opportunity to get the decision to go ahead. I prepare a full business case and plan for this decision-making event.	I expect decision-making to be an iterative activity, but do not have an explicit process to guide how I best manage this.	There is a process of interactions that I need to manage: seeding the initiative, gaining feedback, reshaping the initiative, piloting the concept, etc. in order to enable a decision to be made.

10. When taking an initiative forward:

1	2	3
I believe an initiative will sink or swim on its business and technical merits. It is these that I concentrate on conveying.	I know it is important to think beyond the purely rational business or technical case for action. However, I am never really clear about how to do this.	I believe there are three things I need to manage: • Presenting a strong business case • Generating excitement about the possibilities • Building shared ownership for the initiative.

Table 1: how to find out if you and your staff are good at strategic influencing (adapted from Relay Consultants' NetWorks for You toolkit).

be a strong candidate for coaching others in how to have strategic influence. Hopefully, it will stimulate your thinking about your approach to achieving alignment within your organisation. You will see the sorts of thinking, beliefs and approach that define excellence when taking forward initiatives that have broader organisational impact.

I reiterate that strategic influence can be learned, that developing these skills can be fast-tracked, and that development doesn't need to happen the costly way, through repeated failure. What's more, these skills are easily observable. Others will see and experience the effect of them in action and, just as important, their direct impact on the business success. ■

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