

Influencing Upward

Influencing upward uses the same behavioral skill set as any other form of influence—but because executives usually have less time and a broader perspective, there are certain actions you can take that will increase the likelihood that your influence opportunity will succeed.

Do Your Homework

It's always important—as well as respectful—to use others' time well. When you have an important idea or proposal to put before a senior executive or leader, you will greatly increase your probability of success by careful preparation. Some or all of the following steps will be necessary in order to gain his or her support for an important proposal.

- First, be very clear about both the long-term goal for your proposal and the specific action you want the executive to take.
- Learn what the executive's issues and decision criteria are likely to be. If you can, ask the person him or herself at a preliminary meeting. If you don't have frequent access to the executive, find a mentor or coach who knows the person well. Use inquiring and listening behaviors to get as much information as you can before committing to an influence approach. This is especially important when you expect opposition or resistance. This process will be educational at the least, and may lead to your developing a proposal that can garner the executive's support.
- Modify your proposal to take account of the executive's issues and concerns. Create a better fit between your idea and his or her goals. Think about how your proposal supports the business results that are important to the leader.
- Do the necessary research to support your proposal; look for data that will be meaningful to the executive. Select reasons that are strong in support of your idea and that would be most meaningful to the executive.

- Frame your proposal so that the executive can see how it meets his or her decision criteria. There are usually several ways to look at the issues; be flexible in seeing your proposal through the executive's eyes. At the same time, make sure that you maintain the integrity of the core idea.
- If appropriate, meet with others who know the executive well before the meeting where you plan to present your proposal. Ask for their feedback, listen to their responses, and be prepared to modify your proposal where you believe you can, in order to gain their support. This can strengthen it and improve your chances of success. Ask them to predict what questions the executive may ask and then prepare to answer them.
- Plan specifically how and when to present your idea or proposal to the executive. It may be helpful to provide a brief (very brief) outline of your proposal before the meeting so the executive will have a chance to think through any questions or concerns he or she wants to bring up. It is better to have those out in the open during the meeting rather than to have them come up as "second thoughts" that delay agreement or implementation.
- Make sure that your presentation can be completed in a very short time. Review it for non-essential components. (For example, two or three strong reasons that are aligned with the executive's priorities are usually enough.) Practice until you can be both confident and succinct.

Actively Influence

When you bring your proposal, idea, or request to the executive, there are several things you can do to give yourself a greater chance of success.

- Let the executive know how long you will speak and what you are asking for—you may simply want his or her agreement for you to take a particular action or you may need more active support, involvement, or resources.
- Be brief, clear, and succinct. In general, giving the headlines and providing support material in written or electronic form is best.
- Begin by showing how your idea or proposal supports the executive's goals and priorities. Demonstrate the benefits to the larger organization, customers, or other stakeholders that are important to the executive. Provide a rationale based on his or her key decision criteria.

- Make time for questions immediately after you first present the idea. Be well prepared to answer questions. If something comes up that you are unprepared for, acknowledge that you did not consider it, thank the executive for pointing it out, and commit to getting the information as soon as possible.
- If strong objections come up, listen carefully and check your understanding. Be open to influence as to how to address the concerns. At all costs, avoid defensiveness. Use receptive behavior to uncover deeper issues or information that you may not have had access to.
- Ask for a decision or when you might expect a decision once you believe that all major issues have been expressed and responded to. If you need to get more information before the executive is ready to decide, offer to end the meeting early and return with the information or response as soon as he or she is ready to meet with you again.
- If the executive seems reluctant to make a commitment, pose a challenging question—ask what you would need to do or change in order to get his or her support for your proposal.

Influencing a key executive requires good planning, sensitivity to timing, and a willingness to use a variety of influence behaviors. It also requires that you be open to being influenced yourself.