

# PERSUASIVE ADVISING

Finding ways to ensure your advice is heard, followed and called for, again and again and again.  
Collectively it takes about eight hours to prepare 15 minutes of advice to a senior leader.  
Those 15 minutes simply cannot be wasted.



## About the Paper

Have you ever thought about the role strategic advisors such as accountants, lawyers, risk managers, auditors, HR managers, IT managers and many other back of house advisors play in the success of organisations? I mean really thought about it? You probably have. You may have used language like “enabling services”, “critical functions”, “the spinal cord” or “the core” to describe support provided to the mainstream business.

If you are a strategic leader receiving the advice you have probably thought about the need for key expertise and advice that you can rely on. Key elements required to develop trust in any relationship you have with your advisors.

If you are a strategic advisor you have probably thought about ensuring your expertise is up to date, that your advice is sound, if not sage-like, and that you deliver it as clearly and succinctly as possible so it is understood and acted on. You would have been seeking to develop trust also.

A major problem that is encountered is that strategic advisors are tasked with much more than providing this advice and these other tasks can interfere with the relationship and the level of trust. Finance need to put into place financial controls for example, usually along with a host of other administrative controls such as for travel and procurement. HR and IT do the same, as does legal and as do risk and compliance people while auditors are often seen as good cop and bad cop all in one. These controls create friction between the support departments and management. This leads to complaints and/or excuses being wielded at the strategic leaders.

The challenge of course is striking a balance. Leaders want advice that drives business success not shouts of complaints about the “back office tyrants”. However, how many of the advisors in your organisation that provide you advice, or that work for you in your role as a strategic advisor, gets the balance right? How many are cutting through with their advice and being invited to provide more? How successful are you at cutting through with your advice?

If the answer is “not enough” then this paper is for you. It deals with the myths as to why advice is not cutting through and unveils the real truth. With the truth unveiled it provides a process to find the best pathway for advice to cut through. If you are a senior leader it provides insight into how you can improve the advice you are receiving. If you are a strategic advisor it provides a pathway for you and your team to make the difference you know that can be made.

*Leaders want advice that drives business success not shouts of complaints about the “back office tyrants”*

## Why Advisors feel they are not being listened to

The truth is that many advisors are not being listened to and I mean that quite literally. It is pretty hard to listen to someone if you don't show up to a meeting. Constant cancellation and/or re-scheduling of meetings between the business and support functions is the strongest indication that there is a problem. While you feel it is disrespectful (and it is), it is incumbent on you to ensure the business sees value in meeting with you. If they don't, why blame them for cancelling or postponing, again. They have plenty of pressures and if you are not helping them, why should they give of their time?

If you are getting the meetings and your advice is not being followed, then you still have a problem. In particular, if they are attending "because they have to" rather than because they are being courteous.

Finally, if your internal client is attending, is listening, is agreeing with you, however, they can't relay the message and no action is taken, you and they have a problem.

The comments I hear most from advisors as to why their advice is not being followed include:

- "It's because we are not "sexy" like sales and marketing."
- "Well, we are not from the CEO's office now are we?"
- "If I was taller and better looking I bet they would pay attention."
- "I bet if I was Hilary Clinton or Richard Branson they would sit up and take notice"
- "They don't really see me as a key advisor. I don't think they trust us."

Ok, I am not going to say these have nothing to do with the problem. After all, as an example, studies have shown that there is a 2.5% increase in average salary per inch of height and 12% more income (at least) for highly attractive people when compared to peers. What I am saying is that not every successful advisor is tall, dark and handsome or strikingly beautiful. The average advisor and even the short, squat ugly fella can be persuasive. You know, you have met them at some time in your career.

Here is the thing, it is not about you or any other advisor. It is not that you are not tall enough, funny enough, interesting enough, intimidating enough. These are just pathways different people use to get their message across.

The problem is actually [them](#). Those you are advising.

## Why leaders can be difficult to convince

There are three main things going on with those you are trying to advise, however, they are inexorably linked. First, because you as the advisor from finance, IT, HR, risk ... have been “monitoring” them and you have been reporting on their performance in certain areas, they have cause to at least be wary of you. And if you have caused them grief in the past or grief for those that report to them, they may downright resent you.

Second, if you have put into place controls they feel are overly restrictive, that are counterproductive, they may be more focused on how to “game” your controls than listen to what you have to say.

Third, because of one and two and because of a whole bunch of other reasons, they are not thinking clearly about the decisions they need to make. They have developed a host of psychological biases that are very difficult to overcome without help.

What you as a strategic advisor need to do is help them to manage the risk in their decision making. To do this, you will need to get inside their head, understand their biases or other potential errors in their decision making process and create an “intervention”. More on this later.

## What occurs as you become more persuasive

The more decisions those that those you advise get right over time that are attributable to great advice from you, the more valued you will become as an advisor. The greater will be the trust factor. The more often you will be invited to provide advice, early in the decision-making process.

Have a look at the trust scale in the diagram to the side. When our persuasiveness is at a low ebb our tendency is to revert to the only tool left in the tool box, the biggest stick we can find.

Depending on your role, you may have the ability to block an area of the business from making progress and you may be tempted to enforce this only to become known as a **Tyrant**. People desperately avoid tyrants.

### Trust Scale

### Invite Scale

Authority

10x

Advisor

5x

Expert

1x

Controller

-5x

Tyrant

-10x

Leadership

Dictatorship

Similarly, if you are so focused on your proudly designed controls and fail to see things from the perspective of the business you fall into **Controller** territory and staff will tend to avoid consulting you as they know what they will get. Most advisors at least find their way to **Expert** level where the business is happy to consult with you for the advice they need that only someone in your support function can give.

**Advisor** status arises when you start solving some of their business problems, not just because of your expertise, but because you are providing insight well beyond what the business perceived your support function is able to deliver.

Finally, if you are so insightful, if you are “wisdom personified” when it comes to a particular type of decision and the **Authority**, you will be the first they call on for advice and very early in the process.

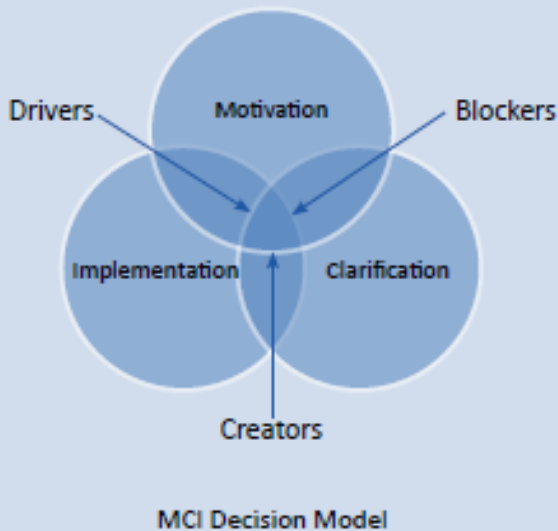
When you attain **Advisor** and **Authority** status you are able to create real change. *You are able to make the difference you know your advice can make.*

## Finding the pathway to deliver your advice

I am sure you will agree that finding the right pathway to deliver your advice is an interesting challenge. You have probably tried many different methods. There is no doubt variety is important, however, finding the right variety for the person you are wishing to influence is key.

In a moment I will introduce you to my Pathfinder Model for helping advisors find the right pathway to ensure your advice cuts through. First, however, let’s return to the notion of creating an “intervention” to help those you are advising to manage the risk in their decision making.

The way I do this is through my MCI Decision Model which is shown to the left. The premise of the MCI model is to flip our inherent decision-making process on its head. To start with motivation, then move to clarification and finally focus on implementation. This is inverse to our natural tendency to start with implementation, then do some clarification (after we have made the decision to proceed) and completely ignore the need to understand our motivation to ensure a good decision is being made.



Yes, our inherent decision-making stance is to immediately start thinking about how to implement the first idea that comes into our head. We start asking ourselves, “How am I going to pull this off?” Consider this: someone you are advising on marketing strategy is sitting at their desk pondering how to grow the business. The first idea that comes into their head is to start a blog and they start thinking through what they would write about and how that would attract customers. They may decide that doesn’t sound like such a brilliant idea so they move onto the next idea which is a broader social-media campaign using Facebook and Twitter.

Again they decide that is not such a great idea because the target market isn’t very active on social media. Then they get the idea to use LinkedIn to get more of the right contacts and to start developing relationships with them. Soon they have developed a LinkedIn profile, they have started connecting and they are randomly firing off connection requests and in-mails. Wait up, what about stopping to clarify what a good LinkedIn strategy is? What have others in like-businesses done with LinkedIn to successfully grow the business? Don’t stop there, what about all the other options they could consider to grow the business? Maybe there is a better way, maybe a coordinated approach across many platforms would be best.

And then there is motivation. Why are they thinking about growing the business through social media? Is it growth for growth’s sake? Is it survival as all their other strategies have failed? Are they even asking the right question? Perhaps the underlying motivation is that they have become stale and bored and the business simply needs re-energising along traditional business channels. All you might need to do is open their eyes to this.

The MCI Decision Model helps you identify what is driving them, the mindset it is creating, and the potential blockers to good judgement. It also helps you identify if they have gone straight to implementation without appropriate clarification.

When you identify where they are in their decision- making process you can design your intervention using my Pathfinder Model.

The Pathfinder Model is a simple process that asks you to stand in the shoes of the person you are trying to persuade, so that you understand them. Next, because a picture paints a thousand words, you provide them with a diagram or picture that allows them to understand with clarity your proposition. Next you tell them a story so they connect with you and with your proposition. Finally, you have the stats and case studies as well as answers to all their counter arguments so they simply must believe.



## What should you do next

Like so many other skills in life, you can learn to become more persuasive and I have provided you a simple formula. Some elements of the formula you will already do well. Your challenge is to master every one of them.

If you take on the challenge to master all elements of the Pathfinder Model you should definitely read one or more of the classics in this space including Dale Carnegie's *How to Win Friends and Influence People*, David Maister's *The Trusted Advisor* and Robert Cialdini's *Influence*.

To really get inside the heads of those you need to influence, to identify the risk in their decision making, I can recommend the unilaterally acclaimed *Thinking Fast and Slow* by Daniel Kahneman, *Decisive* by Chip and Dan Heath and *Why Decisions Fail* by Paul C Nutt.

And if you like the MCI Model and want to get to know the ins and outs of it, contact me for a complimentary copy of my book *DECIDE How to Manage the Risk in Your Decision Making* or buy it online via my website or Amazon and other quality online book retailers.

For drawing pictures you should check out *Visual Mojo* by Lynne Cazaly or *Visual Vocab* by Donna McGeorge.

There are also books on story telling such as *Stories for Work* by Gabrielle Dolan and *Make IT Matter* by Patricia McMillan.

As for the stats and case studies, well that is up to you, however, I find the answer usually starts with G (for Google!).

## About the Author

I have been working as an advisor internally and externally for 30 years throughout my journey from chemical engineer, to risk engineer to management consultant. I have worked with hundreds of organisations across the public and private sector and all sectors of industry. So I know that all advisors and those they advise face the same problem – giving and receiving valuable advice, succinctly and with clarity.

Because of my background in risk and particularly risk based decision making, I came to realise that we all genuinely have trouble thinking with clarity when making key decisions. Even with a solid risk assessment in front of them I witnessed poor decisions being made by senior leaders. That is, I failed to influence their decision appropriately.

This made me realise how critical and difficult the role of advisors is. It is not enough to provide decision makers with well thought through options, advisors must understand the elements that may prevent good decisions being made and break them down.

Over the years I researched and studied many authors, models and approaches in my quest to better understand how advisors can maximise their ability to persuade and I have found a method that works for me and for many, many others I have had the pleasure of teaching through my training and mentoring programs and during the course of consulting assignments.

I have authored many papers over the years and in 2015 I took the plunge and wrote my first book, *DECIDE How to Manage the Risk in your Decision Making*.



The more I use the MCI Decision Model on which the book is based the more convinced I am of the value of a simple model that can be used day-to-day, in business and for personal decision making. It never ceases to amaze me how we manage to trick ourselves into a poor decision so convincingly and easily.

Master the methods you have found here in this paper and you will have significantly more control over your own destiny as you will be a Persuasive Advisor.

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