

Persuasive Advising

Become a Trusted Adviser.

Finding ways to ensure your advice is heard, followed and called for, again and again and again.

Written by
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About this paper

Have you ever thought about the role strategic advisers such as accountants, lawyers, risk managers, auditors, HR managers, IT managers and many other back of house advisers 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.

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

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 advisers.

If you are a strategic adviser 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 advisers 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 advisers in your organisation that provide you advice, or that work for you in your role as a strategic adviser, 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 adviser it provides a pathway for you and your team to make the difference you know that can be made.

Why advisers feel they are not being listened to

The truth is that many advisers 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 advisers 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 adviser. 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 adviser is tall, dark and handsome or strikingly beautiful. The average adviser 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 adviser. 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 adviser 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.

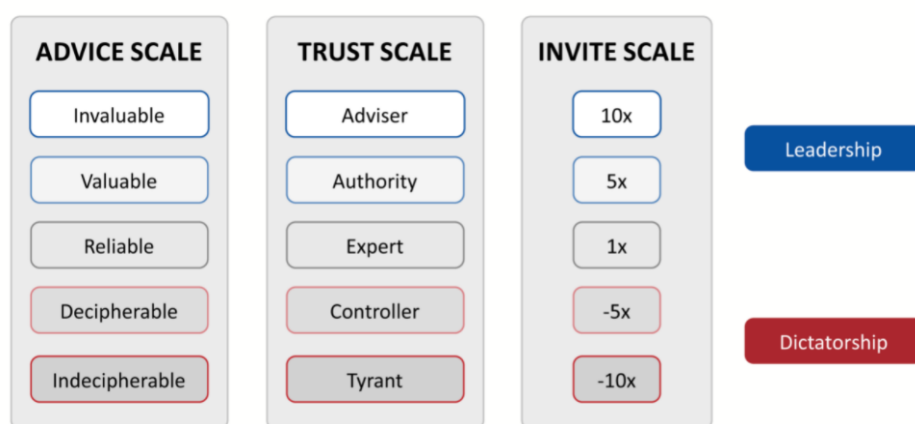
What you as a strategic adviser need to do is help them to manage the risk in their decision making. To do this, you will need to get inside their head, understand their biases or other potential errors in their decision making process and create an “intervention”. More on this later.

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 adviser. 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 below. 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.



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 advisers 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.

Adviser 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 **Adviser** 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

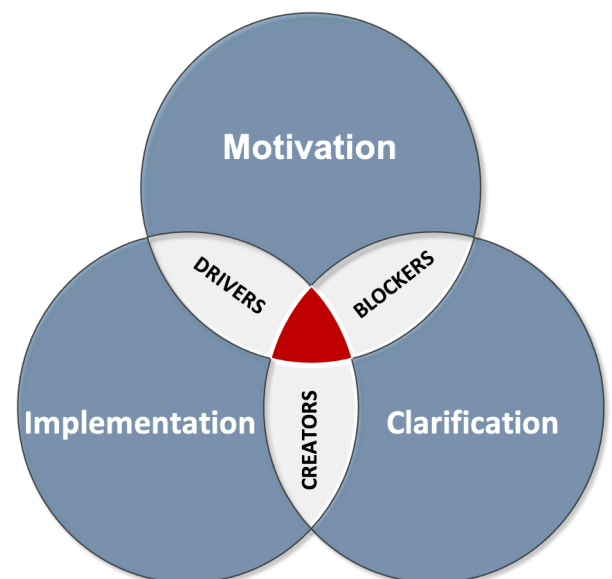
I am sure you will agree that finding the right pathway to deliver your advice is an interesting challenge. You have probably tried many different methods. There is no doubt variety is important, however, finding the right variety for the person you are wishing to influence is key.

In a moment I will introduce you to my Pathfinder Model for helping advisers 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.

MCI MODEL



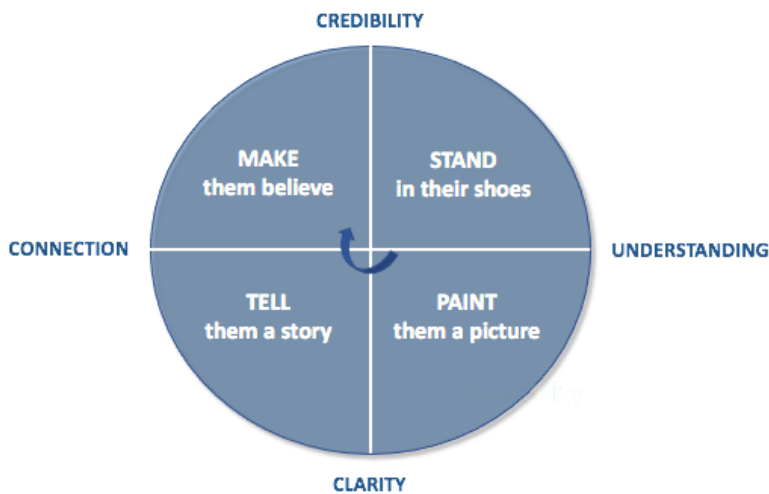
Again they decide that is not such a great idea because the target market isn't very active on social media. Then they get the idea to use LinkedIn to get more of the right contacts and to start developing relationships with them. Soon they have developed a LinkedIn profile, they have started connecting 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.

The Pathfinder Model



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.

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!).

However, if you want to fast track your development, contact me for a complimentary copy of my book **Persuasive Advising: How to turn red tape into blue ribbon** or buy it online via my website or Amazon and other quality online book retailers. It is the handbook for my Persuasive Adviser Program that I run in-house for organisations over one or two days. I also offer a public one-day program for individuals or smaller groups and one-on-one mentoring program.

Go on, get moving on being more persuasive. It's fun. And most of all, it is rewarding!

What people are saying about my persuasive advising program

Audit

"Great course, look forward to using the contents in my work."

Alon Symons, Manager
Assurance, Australia Post
Contract Management

"The influencing skills are applicable for influencing your kids all the way to a 2-star general. Valuable information taught at a level easy to understand.

Terry Benitez, Contracts
Administrator, ALSPO
Department of Defence
Corporate Performance

"Bryan's engaging style made the day fly as we drew, told stories and had a good laugh. It was not just about a fun day, but also one that the team walked away with a new appreciation and set of skills to really tackle those tricky conversations. The entire group now appreciates the importance of understanding what is really driving others by standing in their shoes and the value of storytelling. Back in the office this is now resonating as staff talk about understanding the pressures others may be under before engaging, resulting in greater success. As a leader of a large team it is pleasing that the investment in this

program 'Persuasive Advising' is paying off with superior engagement and results".

Tony Dudley, Head of
Business Enablement,
Transport Accident
Commission, Geelong

Customer Service

"Great session really enjoyed it. Can't remember the last time I was in training where I was learning as well as having fun."

Persuasive Adviser Program
Attendee, Suncorp

Engineering

“Provided a great foundation and practical model to use when faced with circumstances where influencing techniques are required.”

**Scott Bury, HR Manager,
Downer Mining**

Finance

“Bryan’s presentation was clearly articulated & delivered. Learnt some interesting concepts given that I came in thinking that I already was a trusted business partner.”

**Geoff Sturt, Credit Specialist,
Suncorp**

Insurance

“Well presented and provided new tools and techniques that can be used in both personal and professional environment.”

**Saurabh Adhiya, Service
Manager, AON Risk Solutions**

“The course teaches one to empathise and understand what drives people and how to appeal to their senses. Would definitely recommend!”

**Frank Chong, Risk Officer,
HCF Marketing**

“Bryan led a full day workshop for our Marketing Team, and their Finance and HR Business Partners. We saw an opportunity for our Marketing Team to increase their effectiveness through communicating to internal stakeholders and agency partners more concisely and persuasively. The Persuasive Adviser program was perfect for this. Bryan is an engaging presenter, and the concepts he shared were highly relevant and helpful for the team. Our team overwhelmingly agreed that the program was enjoyable and that the material has helped them become more effective as an ‘Adviser’ in our business.”

**Sarah Ryan, Marketing
Director, Campbell Arnott’s**

Safety

“Fantastic methodology that I can start practising straight away. Great practical tools that make sense.”

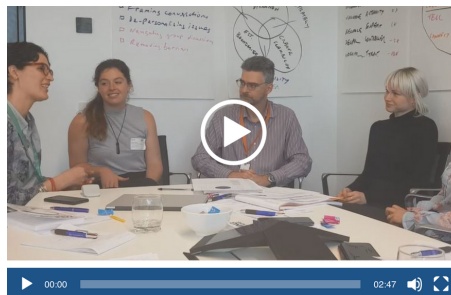
**Jessica Doyle, Head of
Safety, Sydney Opera House
Risk**

“I implemented Bryan’s framework successfully for one of the key decisions at my organisation within the first month.”

**Ripal Shah, Heritage Bank
Australia**



Adrian Wood
EM Risk & Reporting
Suncorp NZ



**Fisher Paykal Healthcare
& Teachers Health Fund**
Attendees



Val King
Executive Director Risk,
Assurance & Information
Management
QLD Health

About Bryan



Bryan is a management consultant operating since 2001. He is a specialist in risk-based decision making, strategic leadership and strategic planning born from his more than twenty years of facilitating executive and board workshops. Bryan's experience as a risk practitioner includes the design and implementation of risk management programs for more than 150 organisations across the public, private and not-for-profit sectors. Bryan is the author of **DECIDE: How to Manage the Risk in Your Decision Making**, a book for strategic leaders who wish to minimise the time taken to get to the right decision; **Persuasive Advising: How to Turn Red Tape into Blue Ribbon** that teaches you practical methods to cut through with your advice and make the impact you want to make; and **Risky Business: How Successful Organisations Embrace Uncertainty (#1 Amazon Best Seller)** that is a guide to the most successful way to design and embed an effective risk framework.

Bryan also authored the Australian Government's Risk Management Benchmarking Survey for more than 120 Government agencies from 2002-2005, lectured in the Principles of Risk Transfer in the Masters in Risk Management program of Monash University from 2002 - 2006 and designed and delivers the Risk Management Institute of Australasia's flagship Enterprise Risk course since 2019.

Bryan has assisted clients across all sectors including:

- Australian Government agencies such as the Departments of Foreign Affairs, Environment, Finance, Industry, Defence, Health and Social Services.

- State Government Agencies Fire and Rescue NSW, NSW Police, NSW Health local health districts, TAFE and the Victorian Department of Health and Human Services.
- Not-for-Profit organisations such as AWI, Cancer Council Australia, CBM, Cerebral Palsy Alliance, HCF, IRT, QSuper, Ronald McDonald House Charities, Uniting Care and Unitywater.
- Private Sector organisations such as Brisbane Airport, Brookfield Multiplex, Employers Mutual, FM Global, Downer, G&S, McConnell Dowell, Navitas, Pro Pac, QBE, Santos, Suncorp, Symbion, Weir Minerals and Xstrata.

Bryan was President and Chair of the Board of the Risk Management Institute of Australasia (RMIA) from 2013 through 2015, and is licensed by RMIA as a Certified Chief Risk Officer (CCRO).

Bryan is also a certified Virtual Presenter.

Bryan's **Consultant Profile** is attached. To hear first hand what Bryan's clients say about him, please check out this [video](#).

www.bryanwhitefield.com

[Bryan's LinkedIn Profile](#)



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