

Persuasive Advising

How to have your advice heard,
followed and called for, again and
again and again.

Written by
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ACHIEVING CUT THROUGH WITH ADVICE ISN'T ALWAYS EASY

As a strategic adviser, there is a variety of hurdles to having your recommendations heard, heeded and acted on. The good news is that most hurdles can be overcome with the right persuasive advising skills – skills that can be learned and finessed, enabling you to effectively influence key decision makers and shape decisions.

One example of a common hurdle is a mismatch in focus: Many strategic advisers focus on the data and findings that back up their recommendations. The focus of decision makers, however, is on advice that meets their specific needs and wants and is valuable to the business.

Another hurdle for strategic advisers in support departments are controls. Advisers in Finance, HR, IT, Legal and Risk and Compliance need to put in place controls while auditors are often seen as good and bad cop in one. These controls can create friction between the support departments and management, which leads to complaints and/or excuses being wielded by the strategic leaders. Ultimately, controls can erode trust between advisers and management decision makers.

The challenge for strategic advisers is striking a balance: Leaders want advice that drives business success, not shouts of complaints about the “back-office tyrants”. As a strategic adviser, are you and your team achieving the right balance, to achieve cut through and build trust so your recommendations are valued and sought after?

If your answer is ‘not enough’ then this paper is for you. It reveals the myths and real reasons why your advice isn’t being heard and acted on and provides ways you and your team can find the best pathway for becoming persuasive advisers.

***When it takes eight hours to prepare 15 minutes of advice,
those 15 minutes cannot be wasted.***

WHY ADVISERS FEEL THEY ARE NOT BEING LISTENED TO

Many advisers in support functions aren’t being listened to because decisions makers are reluctant to meet with them.

Constant cancellations and/or rescheduling of meetings is the strongest indication of a problem. And while this feels disrespectful (which it is), it is incumbent on advisers to ensure decision makers see reason and value in meeting with you.

However, if you are securing meetings and your advice is not being followed, you still have a problem, particularly if decision makers are attending simply out of duty or to be courteous.

Some of the reasons I commonly hear from advisers as to why their advice is not being heard or 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 looked like [celebrity name], I bet they would pay attention."
- "I bet if I was Jeff Bezos they would sit up and take notice."
- "They don't really see me as a key adviser. I don't think they trust us."

While there is some truth to each of these reasons, you might be relieved to know that persuasive advising is a skill unrelated to looks, personal wealth, or business department: a skill that can be learnt.

WHY DECISION MAKERS CAN BE DIFFICULT TO CONVINCE

Decision makers can be reluctant to consider your recommendations and act on your advice due to a number of reasons, two of which are intrinsic to many support function roles: monitoring and controls.

As you have been 'monitoring' your organisations' decision makers and in some instances reporting on their performance, they may have become wary of you. And if you have caused them grief in the past, or grief for those who report to them, they might resent you, greatly affecting your ability to gain their ear and their trust.

Now to controls: When decision makers feel the controls you have put into place are overly restrictive and/or counterproductive, they may become more focused on how to 'game' your controls than listening to what you have to say.

These psychological biases can be incredibly difficult to overcome and can affect decision makers' ability to think clearly when listening to advice and making the decisions they need to make.

With the right persuasive advising skills, you can help them manage the risk in their decision making and slowly build their trust in you. This involves getting inside their head, understanding their biases or other 'roadblocks' to hearing and heeding your advice, and creating an 'intervention' – skills and strategies I share in my Persuasive Advising Workshops.



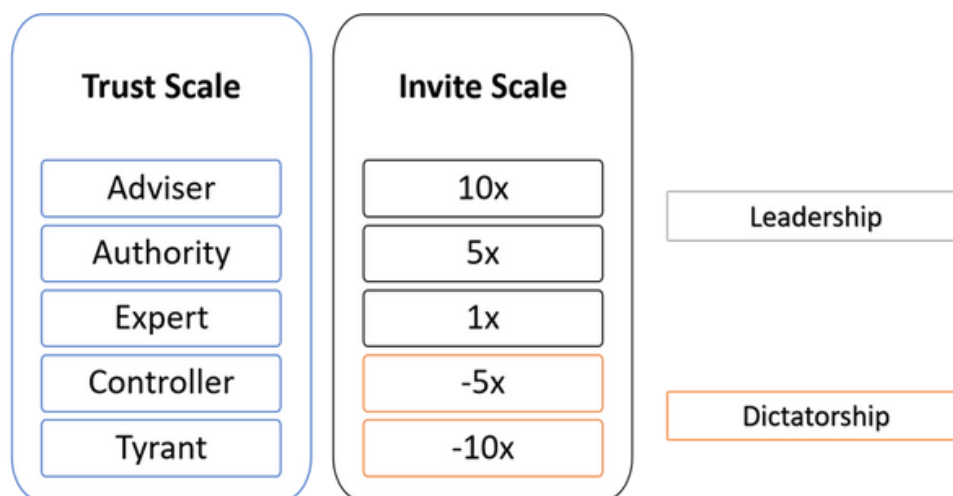
WHAT HAPPENS WHEN YOU BECOME MORE PERSUASIVE

Over time, the more decisions those who you advise get right that are attributable to great advice from you, the more valued – and trusted – you become as an adviser.

Most advisers find their way to Expert level (see my diagram below), where decision makers are happy to consult with them for the advice they need that only they can give. However, advisers who are overly focused on their controls and fail to consider the perspective of the business fall into Controller territory, where decision makers will avoid consulting them as they know what they will get.

As a valued adviser, however, you will be invited to provide advice more often and early in the decision-making process. In fact, as my diagram shows, an Adviser who provides invaluable advice is invited 10 times more than one considered a reliable expert. Trusted advisers solve business problems not only due to their expertise but because they are providing insight well beyond what the business perceived their support function is able to deliver.

As a strategic adviser, Adviser and Authority status should be your aim, as these advisers are able to create real change with maximum impact.



FINDING THE PATHWAY TO DELIVER YOUR ADVICE

You've probably tried many different methods for delivering your advice and know that finding the right ones for the person you are wanting to influence is not always easy.

I developed my Pathfinder Model to help advisers find the right pathway, to ensure their advice cuts through. It's a real-world tested Model that helps you gain a better understanding of the person you are trying to persuade – their needs, wants, pain points, and biases – and forge a stronger connection with them and with your recommendations/advice.

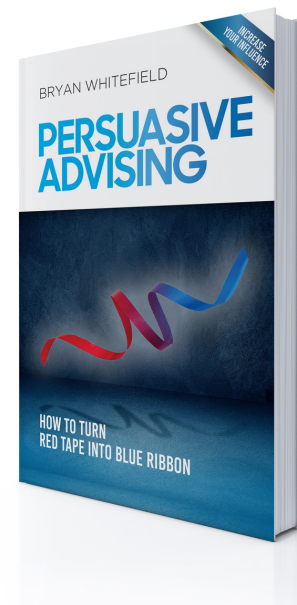
NEXT STEPS

Like many skills, you can learn to become more persuasive. My Persuasive Advising workshops have been designed to help strategic advisers and their teams effectively influence others to listen, seek and heed their advice and become trusted advisers.

These Workshops can be run in-house or online and I also offer one-on-one coaching sessions.

Start shaping decisions, not just informing them: register your interest today at info@bryanwhitefield.com.

All workshop participants receive a complimentary copy of my book *Persuasive Advising: How to turn red tape into blue ribbon*, which is available on my website, through Amazon and at quality book retailers.



WHAT PAST WORKSHOP PARTICIPANTS ARE SAYING ABOUT MY PERSUASIVE ADVISING PROGRAM



Adrian Wood, EM Risk and Reporting, Suncorp NZ

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 'Winning Conversations' 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

Insurance

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

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

Safety

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

Jessica Doyle, Head of Safety, Sydney Opera House



**Patricia (McMillan) Lebreton
Cyber Security Influence and Awareness
Manager, Transport for NSW**

ABOUT THE AUTHOR



I have been working as an adviser 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 advisers 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 advisers is. It is not enough to provide decision makers with well thought through options, advisers 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 advisers 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*. My book that builds on the concepts I introduced, *Persuasive Advising: How to turn red tape in blue ribbon*, teaches you practical methods to cut through with your advice and make the impact you want to make.

The more I use the MCI Decision Model on which *DECIDE* 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 in this paper and you will have significantly more control over your own destiny as you will be a persuasive adviser.

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