Influencing Upwards Job Aid

The Cohen-Bradford Influence Model *adapted from the book, Influence Without Authority, and the website https://www.mindtools.com/pages/article/influence-model.htm*

- Based on the law of reciprocity – the belief that all of the positive and negative things we do for (or to) others will be paid back over time.

- Useful whenever:
    - You need help from someone over whom you have no authority.
    - The other person is resisting helping you.
    - You don't have a good relationship with the person from whom you need help.
    - You have one opportunity to ask the person for help.
    - You don't know the other person well.

Step 1: Assume that everyone can help you. *Always look at the person as a potential ally. In this step, note any words, phrases, or images that help you approach as an ally.*	Step 2: Prioritize Objectives *Why you are trying to influence this person? What is it that you need from them? What are your primary and secondary goals?*	Step 3: Understand the other person's situation. *How is this person "measured" at work? What are his or her primary responsibilities? Does this person experience peer pressure from his or her boss or colleagues? What is the culture of this person's organization? What does this person's boss expect from them? What seems to be important to this person?*
Step 4: Identify what matters; to you and to them. *Think about these five categories of values to help guide you: Inspiration (desire for meaning), Task (focused on resource constraints), Position (desire for recognition), Relationship (desire to belong in the community), Personal (focused on relating as a person)*	Step 5: Analyze relationship. *How well do you know the person? Do you need to build trust and a stronger relationship before making the request? How would you do so?*	Step 6: Make the "exchange"

Example

Mark works in the accounting department in his organization. He's implementing a new software package that will streamline the collections process, eliminating several unneeded steps. However, he needs help from his colleague, Rob, to solve a problem. Rob has exactly the expertise Mark needs. The problem is that Rob is extremely busy with his own projects, and has so far been unwilling to help. So, Mark uses the Influence Model, as follows:

Step 1: Assume that everyone can help you. *Always look at the person as a potential ally. In this step, note any words, phrases, or images that help you approach as an ally.* Mark already knows that Rob could be an ally; they've always gotten along in the past. The only reason that Rob is unwilling to help is because he's "snowed under" with his own projects, most of which have tight deadlines.	Step 2: Prioritize Objectives *Why you are trying to influence this person? What is it that you need from them? What are your primary and secondary goals?* Mark takes a moment to clarify his goals. Why does he need to influence Rob? This is simple: Rob has the expertise Mark needs to overcome a problem he's stuck with. His goal is to gain Rob's help, perhaps for half a day, to solve the problem.	Step 3: Understand the other person's situation. *How is this person "measured" at work?* *What are his or her primary responsibilities? Does this person experience peer pressure from his or her boss or colleagues?* *What is the culture of this person's organization?* *What does this person's boss expect from them?* *What seems to be important to this person?* Mark looks at the professional world that Rob, who works full time in IT, works in daily. Mark knows the IT department is deadline driven. Rob is often under immense pressure to troubleshoot problems as they come up, but also to deliver major projects that have quick turnaround times. As a result, Rob frequently stays late and comes in early to meet all his demands.
Step 4: Identify what matters; to you and to them. *Think about these five categories of values to help guide you: Inspiration (desire for meaning), Task (focused on resource constraints), Position (desire for recognition), Relationship (desire to belong in the community), Personal (focused on relating as a person)* Mark believes that task-related factors are important to Rob. What he needs most is another set of hands to help him complete some of his current projects. If he could catch up, he'd probably be willing to help Mark with his own project.	Step 5: Analyze relationship. *How well do you know the person? Do you need to build trust and a stronger relationship before making the request? How would you do so?* Mark is already on good terms with Rob. They don't talk often since they work in different departments, but they've chatted a few times in the hallway, and Mark would consider Rob a friend.	Step 6: Make the "exchange" Mark decides on his exchange. He's going to offer Rob a full day of his own time to help him catch on his projects. In return, he'll ask for half a day of Rob's time to help him with his own project. When he approaches Rob, Rob looks surprised at the offer. But, he accepts immediately. Mark shows his appreciation by showing up early on his day to help Rob, and working hard the entire day. When the time comes for Rob to help Mark, the same holds true: Rob shows up early, and the two get the problem figured out by lunchtime. Mark then takes Rob out for lunch to show his gratitude.