



Confidential Report and Notes for Guidance
Prepared for Anne Barry

New Reporting Structures

The Hale Circle of Influence™



Personal Impact and Influence Questionnaire

For the personal attention of Anne Barry

This report has been prepared for you based on the questionnaire you completed about an influencing situation concerning you and PJD. In the questionnaire you were asked to give the situation a title and you described it as "New Reporting Structures".

The report contains notes for guidance which are intended to help you prepare for your discussions with PJD but these can only serve as some suggestions for you to consider since we can not be aware of all the issues and history surrounding the situation. It is important to consider your previous relationship and history with PJD since this will have a significant effect on how well you know them and their likely responses.

In the notes that follow we have used your thoughts and insights about PJD in this particular situation. You might deal with PJD in other situations and there may be some things that remain the same. However it is important to note that the context for Impact and Influence is a vital element in the equation. This means that the same people might operate in a notably different way if the context changes.

We hope the report and notes will help you to plan and prepare for this important influencing situation. For more information about Dr Richard Hale's work on which this report is based, more information about the Circle of Influence™ and a variety of resources and programmes in the field of Impact and Influence please visit our web site at www.clearworth.com or contact us via email on pjiq@clearworth.com



Clive Hook
Programme Director - ClearWorth



Personal Impact and Influence Questionnaire

The feedback about your discussions with PJD is based on a model for Impact and Influence devised by Dr Richard Hale, namely the Hale Circle of Influence™. This model describes principles and practices for each of eight phases of influence which we have grouped in pairs.

■ Preparation and Pleasantries

People often say they do not have the time or opportunity to prepare for influencing situations. In a chance meeting you might have to act spontaneously but most influencing situations can be anticipated and you will achieve better results if you prepare. This means thinking about how PJD will view the situation, anticipating the sort of questions or objections that might be raised and considering the values and motives behind these. The first few minutes of a meeting set the tone for how it will proceed. Invest time in building rapport and trust with PJD. Skilled influencers "see how they are seen" and manage the impressions that others form of them. This means being aware of how you may be perceived or stereotyped by PJD and managing this, either by challenging or reinforcing the stereotype.

■ Position and Problems

You need to have a clear agreed picture of the current position and how it is seen by PJD. It is always better to understand and challenge even your own assumptions before leaping to conclusions or putting forward your proposals. If you are in conflict at an early stage then it can be difficult to recover the meeting and set it back on a constructive course. With agreement on the current position you are well poised to discuss the problems associated with it. By asking PJD to describe the problems and not reacting or trying to justify or disprove the views expressed then you can then build from that position. If you can reach agreement on the nature of the problems, then you build permission to move on to exploring the possibilities for change or action. The more you can create a sense of joint problem solving the better.

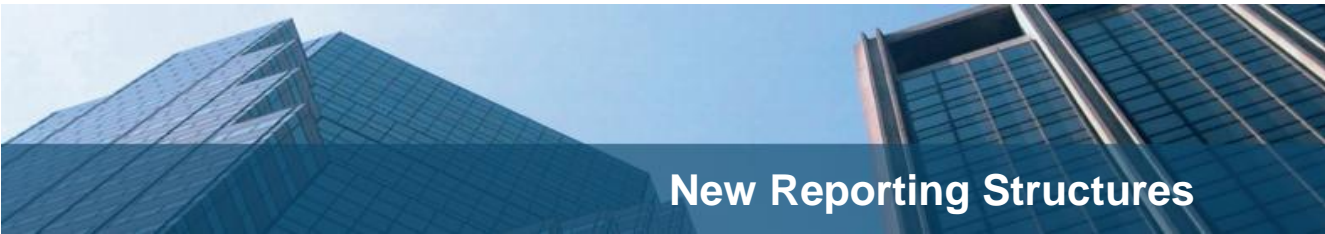
■ Possibilities and Preferences

Going into an influencing situation with just one solution, and a mindset of "all or nothing", will mean you are seen by PJD as having a fixed view of what you want - this prompts the question as to why you are bothering to talk. Have more than one possible outcome that would or could work, and include the option of doing nothing in order to show you have considered the implications. With a range of possibilities considered you now need to move to influence PJD. You need to be bold enough to "ask for the order" and seek commitment to a way forward. The psychology of persuasion is important at this point and you will need to think what constitutes a "win" for PJD – being fair, achieving status, being logical or maintaining control could all be important. A "win" is personal not organisational – so it must be personally rewarding.

■ Proposals and Proactivity

Start to build the future in collaboration with PJD and show you have taken all sides' thinking into account in developing realistic action plans. The proposals agreed at the meeting will have a personal importance, but there are nearly always others who need to be persuaded by the plans you develop together. Ask who else needs to be influenced and check how your proposals affect others' perspectives. Help PJD to work out how to best influence stakeholders. Influencing others means getting people to do something differently, and you have not influenced if you do not have a commitment to action. If you ask PJD to summarise the next steps you can judge the level of commitment from the way the future is described - as if it is guaranteed to occur or still somewhat speculative and conditional.

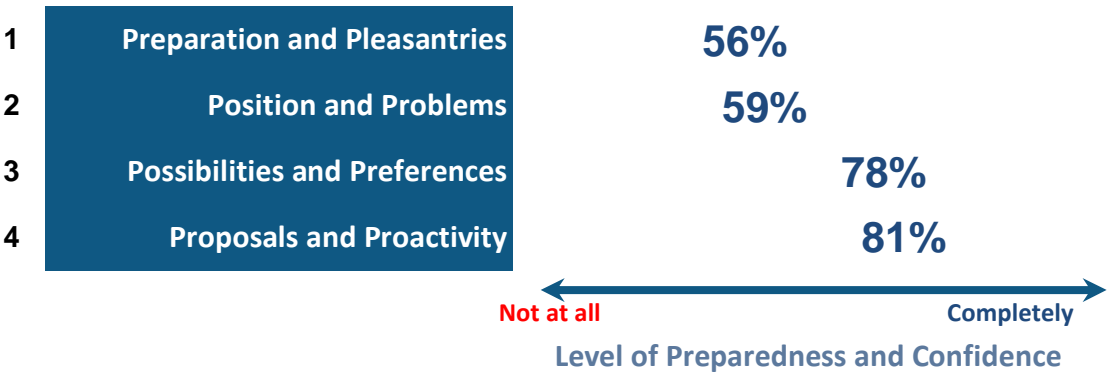
Prepared for Anne Barry



New Reporting Structures

You were asked a series of questions about each of these four areas and your scores have been computed to show your level of preparedness and confidence in each area. The scale was from "Not at All" to "Completely". In terms of your confidence and amount of thought and preparation given to each of these areas it would seem that the priority order for you to consider them is as shown.

Percentage Preparedness for Anne Barry based on responses about New Reporting Structures with PJD



Specifically, these are the 10 lowest scores you entered when talking about your levels of preparedness and confidence. This suggests that these are the priorities you need to consider when planning and preparing for how you will approach this influencing situation. The titles in CAPS after the question identifies which area of the Hale Circle of Influence™ this falls within.

- 1 I know how to engage their interest from the start - PLEASANTRIES
- 2 I am clear on the current position for this situation - POSITION
- 3 I have some alternative ways forward that might work for all parties - POSSIBILITIES
- 4 I feel I have already created a rapport with them - PLEASANTRIES
- 5 I can easily summarise where we are with this situation - POSITION
- 6 I am clear on the key concerns for them about the situation - PROBLEMS
- 7 I have developed my proposals for moving things forward - PROPOSALS
- 8 I have prepared myself fully for the next meeting - PREPARATION
- 9 I have a structure in mind for how the meeting will work - PREPARATION
- 10 I have considered how to best present my proposals to them - PROPOSALS

Use this list to help you think through what you need to concentrate on, and to generate a list of specific actions to help you be better prepared for influence and impact.

Prepared for Anne Barry

Twenty Tips for Impact and Influence

We have also included 20 specific tips from Dr Richard Hale, the inventor of the Hale Circle of Influence™, to help you plan. These are presented in the order of priority shown in the graph above.

1 Preparation and Pleasantries

- Practise what you are going to say to set the agenda for the meeting
- Do some research to understand their style, values and beliefs
- Consider the objections they may raise and rehearse your responses
- Consider how they may view you and how you can manage their perception
- Listen for their interests and look for common ground

2 Position and Problems

- Ask them for their perspective - what the problem means for them
- Summarise frequently to check you've understood and show you're listening
- Discuss the current position and seek their point of view
- Listen to understand their values and beliefs and appeal to these
- Ask questions to seek understanding of their view, not change it

3 Possibilities and Preferences

- Ensure you know their preferences and values – test by floating a possible proposal
- Build on where they are coming from rather than force your views on them
- "Ask for the order" when they consistently talk about the future rather than the present
- Try positioning your preference at the end of a list of three possibilities
- Use emotional appeal – what's in it for them - to get personal commitment

4 Proposals and Proactivity

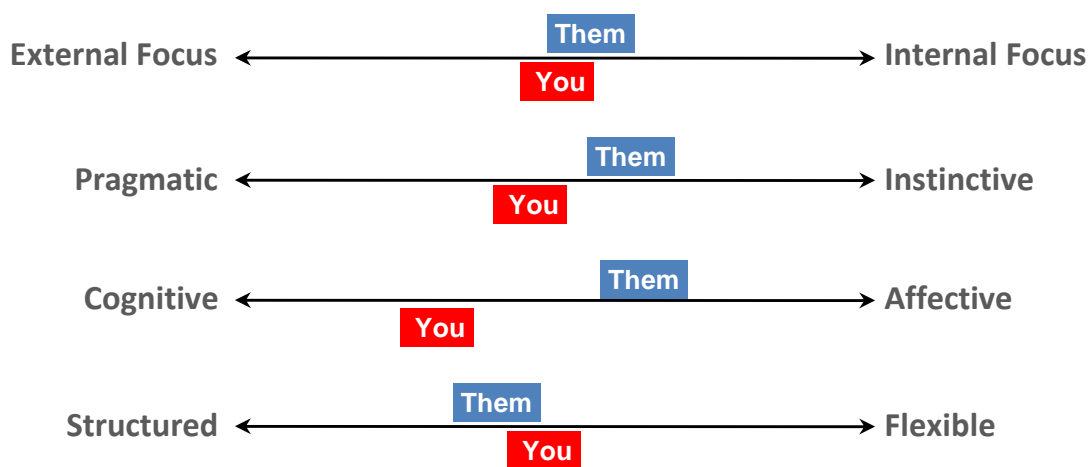
- Ask who else has to be influenced and consider how they will “sell” to stakeholders
- Check for commitment from the other person by considering what they say and how they say it
- Ensure there is common agreement on what will happen next
- Summarise what you will do and ask them to summarise what they will do
- Identify potential barriers in their mind that may prevent action and discuss how to overcome them

You may also find it helpful to use this list and the graph on the previous page to look at specific sections on each page of this report. Each section is divided into paragraphs which deal specifically with an area of the Hale Circle of Influence™ - so, for example, if you have quite a few items in Position and Problems - read those first or concentrate specifically on them.



From your answers to the questions about the way you and PJD operate, we have charted where you both are on each of four dimensions. These relative positions are critical in considering how you prepare for your discussions, since the combinations of the way you and PJD work affects the advice contained in this report and the actions you should consider to have the most Impact and Influence.

A Comparison of Your Operating Styles in Interactions



You may be in similar or very different places on one or all of the dimensions. This is not good or bad - it simply informs what you are going to find easier or more of a challenge to work on and what you are likely to encounter in your discussions. Being the same means you may both overplay some strengths. Being different means you may have to adapt or at least be mindful of your different approaches which will affect your work together.

This report is built around four aspects of working with PJD. So, there are four sections - each of which contain specific insights which relate to the phases of the influence process when working with PJD:

- Section 1: Interacting with PJD
- Section 2: How PJD Works with Information
- Section 3: How PJD Makes Decisions
- Section 4: How PJD Organises and Plans

In the notes that follow we have used your thoughts and insights about PJD in this particular situation. You might deal with PJD in other situations and there may be some things that remain the same. However it is important to note that the context for Impact and Influence is a vital element in the equation. This means that the same people might operate in a notably different way if the context changes.

Section 1: Interacting with PJD

- Preparation and Pleasantries** Note that PJD is most comfortable where there is time for some informal pleasantries, but would want to move onto the issues at hand. PJD may find talking about just the facts a bit impersonal but will not want to spend long on non-factual or personal items. You seem comfortable mixing personal and work issues. You are happy to talk around the subject but would want to get on with the meeting itself. Your similar approaches mean you can have a flexible start to the meeting with a clear agenda but able to move to find common ground before you and PJD progress with the agenda items. Prepare for a meeting which will allow you to explore thoughts and ideas together within the framework of the given agenda.
- Position and Problems** It seems from your analysis that, when discussing a problem, PJD likes to put forward opinions, but is also interested in others' inputs and evaluations before committing to a clear position. So PJD will expect a reasonably open discussion about the situation and all parties' positions to be clarified. You have opinions, but you are also interested in hearing all sides before you commit yourself to a course of action. So with this in common as you're looking at the problem and your positions, you and PJD can move from an exchange of opinions on to examination of the facts of the situation. There is a shared recognition of the need to balance facts and feelings in the discussion.
- Possibilities and Preferences** Your findings suggest that PJD is happy to venture suggestions or ideas if asked, and should also want to hear others' views on the possibilities and preferences before committing to one in particular. You are comfortable giving your views on the possibilities and preferences available, but are also open to hearing other opinions before you commit yourself. So you and PJD may want to summarise and agree your shared understanding of current reality before you go on to explore the possibilities and preferences. This will help ensure you stick to discussing the course of action, rather than digressing into comparison with other situations.
- Proposals and Proactivity** The scores you provided suggest that, when considering how to move forward, PJD will be comfortable putting forward proposals if asked but will also be happy to listen to others' ideas. You are reasonably confident sharing your thoughts on proposals if asked, but you like to hear all of the views as well as putting forward your own opinion. So you and PJD will be happy to give your opinions, but you may want to get the ball rolling by brainstorming the options available and then narrowing things down to avoid vagueness and unclear pointers for the next steps.



Section 2: How PJD Works with Information

Preparation and Pleasantries Your insights suggest that PJD processes information most effectively when energised by new ideas or concepts, and inspired by changes of focus and new approaches. You like to review both the facts available and to look at new ways of using information you discover. So clearly state the objective for the meeting and look for ways to build some flexibility into the agenda. The first part of the meeting will be an opportunity to share a range of information. Note that PJD will be more interested in facts from the beginning so make sure this initial phase is obviously connected to the meeting's agenda.

Position and Problems Your description and evaluation of how PJD works with information suggest that, for PJD, exploring lots of different ideas and scenarios is a part of the process in understanding the position and problem. You like to balance reviewing the facts and figures of the situation with exploring different angles. So agree how you will both examine the position and problems, whether you and PJD will stick to the agenda and discuss other ideas afterwards, or speak your thoughts as you have them. Note that PJD has less interest in factual data than you and will want to think about implications not just status reports.

Possibilities and Preferences It appears, from the data you have provided, that PJD will see a number of different viewpoints and enjoy looking at all of the possibilities and preferences available. You look at the possibilities and preferences from a factual viewpoint, but you are also comfortable examining the multiple views available. You will, therefore, have more of an interest in the explicit data surrounding the possibilities and preferences than PJD, so make time to review these and make connections with the ideas and opinions offered. PJD will be able to see these connections fairly quickly so you will not have to spend long on this.

Proposals and Proactivity When considering information about taking action, PJD is interested in looking at different interpretations and is especially inspired by fresh approaches or ideas. You like to explore both factual and more open-ended thinking before you commit yourself to proposals or actions. Note that PJD is engaged by wider horizons and approaches and will have to work to stay focused on what has been agreed. Your preference for practical, factual approaches means you like clear proposals linked to previous discussions. You will need to balance your need for grounded reality with the potential and implications for future plans.



Section 3: How PJD Makes Decisions

- Preparation and Pleasantries** It seems that PJD is more comfortable in the initial stages of a meeting when talking and gathering data about opinions, values and individual interests and instincts rather than purely factual data. Your style of decision making involves fully understanding the factual data and being able to fully analyse what's known to help you make a rational decision. With this in mind, your plan for the meeting should explore thinking and instincts about how to decide. The facts and data may almost be a secondary item. Have these available as a "sense check" for you on what is decided – but note that you will have more energy for the data than PJD does.
- Position and Problems** Your reading of the situation has described PJD as being likely, in decision making about any problems, to rely on instinct. PJD is less likely to spend time on factual assessment, and more time on examining beliefs and values about the problem and position. You prefer an analytical approach to decisions, based on an objective assessment of the situation and any issues which are a problem. So you may find it difficult when PJD strays into more subjective areas – allow time for this sensory area, but also provide the relevant facts and data. Remember you will be more interested than PJD in assessing this to support the decision.
- Possibilities and Preferences** It is likely from what you have reported that PJD is more comfortable looking to personal beliefs and values to make a decision when choosing between possibilities. You prefer to assess all of the facts and data to make your decision rather than rely on feelings to guide your choice. So allow time to talk about "gut feeling" on the decision, but ensure there is time for you to analyse the data and check it fits. Be aware you will be more concerned than PJD that the "hard" data confirms you are making the right decision. Be prepared to explore where PJD sees it is important to consider less logical (and more personal) bases and assumptions.
- Proposals and Proactivity** From the results of your analysis, it seems likely PJD will be more comfortable making decisions about the way forward when there is an appeal to values, feelings and beliefs - sometimes with facts as a secondary consideration. You prefer to take an objective understanding of the situation before making a final decision on what should happen next. So PJD will be happy to rely on "gut" feelings for the final decision, but you will be concerned with checking this applies to the facts available. Make sure you have the relevant information available and check PJD agrees that both match before you confirm the decision.



Section 4: How PJD Organises and Plans

Preparation and Pleasantries

In this situation, PJD is likely to prefer it when there is a framework in place, but one that adapts as the meeting progresses to take account of things that emerge. This might mean that the meeting will be somewhat unstructured at first. You prefer a structure to meetings, but also enjoy variety, and some flexibility in the planned agenda. You will want to achieve a balance between initial non-business items and getting on with the agenda. PJD, like you, will be happy moving on when the time seems right, but you should perhaps be the one to propose getting down to business to keep control of the meeting. If PJD is ready then proceed with the agenda but check from time to time that the structure is not too constraining.

Position and Problems

From what you report, it is likely that PJD will want a definite structure and agenda to address the position and problems during the meeting. PJD will also, it seems, be prepared to explore alternatives which allow some flexibility in addressing the problems and all parties' positions. You like structure, but you are also happy to explore other possibilities and other avenues as they arise in a meeting. So both you and PJD should be happy using a structure or approach to the problem which allows some flexibility. This will fit with the relatively flexible style of operating you and PJD share, but it may be useful to periodically summarise the position and problems on a flipchart before moving on.

Possibilities and Preferences

Your assessment of the situation suggests that PJD appreciates understanding the facts with clear connections and a logical fit. However, PJD may also be willing to explore new approaches or suggestions - even if there are not hard facts to support an idea or proposal. You are happy to examine different possibilities and preferences, but you like to understand how the concepts will apply to the existing situation. There might be a slight tendency to leave things rather open-ended, and you may thus end up with a too broad-ranging approach. To guard against this summarise key points together with PJD and return to these throughout the discussion to ensure you stay on track.

Proposals and Proactivity

The results of your analysis suggest that, when looking at the way forward, PJD could leave things somewhat open-ended rather than have a very fixed plan but might also use an outline structure to help guide actions and outcomes. You expect some structure for the proposals and plans, but you also want to retain some flexibility to allow things to evolve. So there will need to be a working combination of structure and flexibility for the plans. Make a list of the proposals and next steps and summarise this with PJD before you finalise agreement, to ensure everything has been covered.