ADD AN INFLUENCING EXPERIENCE TO YOUR GRADUATE MARKETING COURSE: A RECOMMENDATION BASED ON FIVE YEARS OF EXPERIENCE

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ABSTRACT

This paper argues that an experiential exercise in influencing strengthens the introductory Graduate Marketing course in important ways: students learn Marketing more thoroughly because they *practice* it in addition to learning *about* it and sometimes they accomplish a mutually beneficial exchange. A classroom-tested set of suggestions for the influencing experience is presented, including an outline for the student report.

INTRODUCTION

"Influencing" is defined as changing another person's actions without using force or authority. Synonyms for influencing include: persuading, motivating, selling, convincing, winning over. To influence someone, you have to convince the other party that accepting your proposal will help him (her) to satisfy his (her) needs.

Influencing plays a major role in business: in selling to customers, managing subordinates, gaining support from superiors and in advancing one's career. It seems reasonable to suggest that business schools should help students to develop their influencing skills. The question is whether the introductory Graduate Marketing course is a proper home for an influencing experience. The answer proposed in this paper is positive, as follows:

1. When students perform the influencing experience they actually *practice* the Marketing Concept of seeking to achieve their goals by helping others to achieve theirs by engaging in a mutually beneficial exchange. If we subscribe to the idea that experience is a good teacher, it would seem reasonable to supplement traditional teaching methods with some experience.

2. Students have applied the methodology described in this paper to a variety of situations, many of them job related. Examples include: asking for a raise or a promotion, securing the cooperation of a peer for some important activity, motivating a subordinate to improve his or her performance, closing a sale, securing a new customer. Consequently, students appreciate this experience and this improves their evaluation of the course. It may be worth noting that even professional sales representatives with several years of experience have reported that the discipline imposed by the method presented in this paper has improved their performance.

The following discussion of influencing is based on the author's experiences and observations, as well as published sources: Boyen (1989) and Russell (1982). This material may be used as the basis of a lecture or as a handout or as a combination of lecture material and a handout.

1. DETERMINE WHOM TO INFLUENCE

Determine exactly what you need from the people you will influence. To explore your needs, list all your objectives and rank them. For your Top Rank Objective (TRO), discover your SWATs (Strengths, Weaknesses, Auspicious Conditions and Threats):

Strengths = your attributes that are helpful to achieving your TRO.

Weaknesses = your attributes that are harmful to achieving your TRO.

Auspicious Conditions = outside conditions helpful to achieving your TRO.

Threats = outside conditions harmful to achieving your TRO.

Identify the people who can best help you to achieve your TRO, in view of your SWATs. Think of these people as your clients.

2. WHAT ARE THE NEEDS OF YOUR CLIENTS?

Figure out the needs of your clients (the persons you will influence). You will be able to explore the needs of your clients when you meet, but thorough preparation increases your success rate. Evaluate the objectives and strategies of your clients:

a) What are your clients' objectives?

b) What are their SWATs? (their Weaknesses and Threats are your Auspicious Conditions.)

c) Considering your clients' SWATs, will they be able to accept your offer? Do they have the resources needed? If the answer is "yes," continue. If the answer is "no," identify better clients and repeat the process.

d) How can you help your clients to:

(1) Stop their Weaknesses?

(2) Defend against their Threats?

(3) Exploit their Auspicious Conditions?

e) Anticipate risks your clients may see in your offer and modify your offer to avoid these risks. Examples of risks your clients may perceive include:

Perform the first two steps very carefully to avoid making a time consuming influencing effort, only to discover later that the effort should have been directed at someone else, with a different offer. The term "offer" is used on the assumption that any time you use influencing (as opposed to demanding) you present an offer to the client (person to be influenced) and if the offer is accepted an exchange of money and/or goods and services will occur and objectives of both parties will be achieved.

3. HUMAN BEHAVIOR CONCEPTS

Keep these human motivators in mind when you develop your offer:

- People want to *increase*: income, security and esteem and to *decrease* expenses, costs and risks.
- Even more strongly, people want to *avoid*: monetary loss, fear, anxiety, criticism and ridicule and to avoid increases in expenses and costs.

Also, expect these two common obstacles:

- Most people *are unwilling to change* their thinking and their behavior. They resist (and even reject) constructive recommendations that may help them to achieve their goals or to avoid problems.
- Most people *distrust strangers*. If you approach clients who do not know you, don't take it personally if they try to avoid you. It's human nature.

4. ESTABLISH YOUR CREDIBILITY

Two components of credibility are good intentions and character. All of us are struggling to make our way in the world, so that no one expects you to be a complete altruist. But there must be no question about the sincerity of your offer.

Competence and pleasing personality are other components of credibility. You should always be working to increase your competence through study and practice and as for personality, networking and formal evaluations will help you to determine whether you need to change.

An effective strategy for building credibility is to become a source of helpful information for your client. In time, your client will think of you as a friend and advisor and will also tend to feel indebted to you. This will help you when you influence your client.

Other useful tactics, perhaps obvious, are to always be friendly, never combative or grouchy and to buy lunch once in a while.

5. PREPARE FOR INFLUENCING

Plan your opening statement, plan answers to negative responses, engage in role-play and engage in imagery. If your offer is fairly complex, it may also be a good idea to plan a formal presentation.

Plan Your Opener. The opening statement should suggest the benefit that the client will obtain by accepting your offer. The opener should also include supporting information to make the benefit credible. The best supporting information is a disclosure of goal-satisfying results that have been obtained by people or organizations, that are similar to your client. *Quantify the benefit that your offer will deliver.* An example might be: "Ms. Smith, I would like to show you an idea for a 20% cost reduction obtainable with a new process. Mr. Jones at XYZ Company is already benefiting from this new process. Your company, should also be able to obtain these benefits because your company is similar in many ways to the XYZ Company."

If your offer is so novel that comparable experience has not yet been recorded, an alternative is to cite a unique feature of the offer that supports the claimed benefit, for example: "Ms. Smith, I would like to show you an idea for a 20% cost reduction obtainable with a new process. This process is so successful because it uses a patented alloy that allows a 40% reduction in processing time."

Plan Answers to Negative Responses. What if your client expresses disbelief or tries to cut your visit short or tries to shuffle you off to a subordinate? Anticipate all the reasonable possibilities and prepare your reactions as follows:

Client expresses disbelief. Your correct response is to probe by asking "Why do you say that?" This gives the client a chance to clarify whether the disbelief applies to the claimed benefit or to the supporting evidence. It may also turn out that the client did not hear you properly or misunderstood what you said. The feed-back you receive will help you to clear up misunderstandings or to offer additional proofs to support your claims.

Client tries to cut the visit short. Ask for an appointment at a better time. Offer the client two choices, for example, this afternoon at 1 p.m., or tomorrow at 10 a.m.

Client tries to shuffle you off to a subordinate. Ask whether the subordinate has authority to make a commitment on his (her) own. If the answer is yes, accept. If the answer is no (which is the more likely situation) point out that the potential benefits from your offer will be delayed without any corresponding gain.

Role-Playing consists of practicing your influencing effort with an associate before doing it in the real world. You have to prepare your role-playing partner by telling him or her how tough you want the responses to be. The more you role-play, the more confident you will be when you do it in reality.

Imagery. Imagine yourself in the influencing situation. You enter the client's place of business, deliver your opener, respond successfully to objections, probe for needs, attempt the conditional close, give your presentation and ask the client to accept your offer. You hear objections, reformulate your offer and again ask for the order. (See the sections that follow for details.)

As you imagine the situation many times, trying different approaches to different obstacles, always with a successful conclusion, you gain familiarity with the entire process and build up your confidence and thereby increase your probability of success at the real influencing encounter.

A Formal Presentation should be prepared if your offer is complicated. Your offer may be accepted immediately, but if your client needs, or expects a presentation, you should be ready. The purpose is demonstrate the benefits in convincing detail and to explain how the benefits are realized. Diagrams, tables, charts, and videotapes make a presentation more interesting and understandable.

6. PRESENT YOUR OPENER

You have prepared thoroughly and now you are face-to-face with your client. Previous research may have revealed possibilities of establishing rapport by citing some common bond (same school, town, avocation, etc.) or recognizing a significant accomplishment of the client. The advantage of trying for rapport is that it may result in a favorable predisposition toward your offer. Next, make your opening statement: introduce the benefits others have experienced, in similar situations by accepting offers like yours.

7. GET THE CONDITIONAL "YES"

After your opening statement, let your client's response guide your next steps. The client might agree to your offer, in which case you should document the acceptance in some appropriate fashion, express thanks and take your leave. Alternately, the client may show interest but express doubts as to whether the offer you described actually fits their needs. In that case, ask the client to tell you about their needs. Listen for a need to which your offer will be a magnificent response. Ask questions, probe and paraphrase.

For example, let's say the client is your boss' boss and she expresses concern with costly delays in completing certain types of projects and your planned offer is to reorganize the department with you in charge of a major section. Your goal at this point is to get the client to start saying "Yes" to your suggestions. That will make it easier for her to say "Yes" when you present your offer and "ask for the order." Your paraphrase would then be: "In other words, you are considering the possibility of changing the organization if that would lead to cutting out the delays."

As long as your paraphrase has a conditional tone (the "if" in the middle), it should not be difficult for your client to agree with your paraphrase.

If the client does not appear to be responsive, you are not addressing an important need. Try moving upward on his (her) hierarchy of objectives by asking "Why is that important to you?" Keep probing until you feel you have a good understanding of your client's objectives hierarchy. Compare these objectives with your offer. When you feel that you have a good fit between the client's needs and your offer, try the conditional close: "If I could show a way of satisfying your objectives, would you be interested?" This is another way getting to "Yes." Of course, the better your preparation, the quicker and more certain will be your voyage to "Yes."

8. MAKE THE ACTUAL OFFER

Make the offer, show that your offer will satisfy the client's needs and ask the client to accept it. If the client says "Yes," express your thanks, complete any paperwork that might be necessary, say "Good-bye," and leave. Do not feel compelled to do or say anything else, regardless of how fine a presentation you have or what excellent stories you might tell. If, on the other hand, the client declines to say "Yes," go on to the next step.

9. DEAL WITH OBJECTIONS

If the client declines, one reason could be that they do not understand the offer well enough to appreciate its value to them. Encourage them to ask questions that may enable you to clarify the issues. Another possibility is that you have not responded to his (her) objectives. Go back to discovering needs and ever higher level objectives in the client's hierarchy of objectives and strategies. Listen carefully. When you feel that you have enough new information to try to ask for the order, present your offer, modified so that it responds to the newly discovered objectives and go for the close.

10. APPEAL TO EMOTIONS

If the client still declines, try some of the following tactics: report testimonials from satisfied clients and then try to close; describe the goal achievement your client will experience by accepting your offer and then try to close; refer to respected people or organizations that do what you recommend and are obtaining good results; stir up fears by pointing out what may happen: rising costs, missed deadlines, lost sales, lost customers, if your offer is not accepted. Then try to close.

If nothing works, say "Thank you" and "Good-bye" and leave. Then try again another time and/or find a better client.

OUTLINE OF AN INFLUENCING EXPERIENCE

I. Evaluate your objectives and SWATs.
A. What do you need that you might reasonably get from other people?

II. Prepare a list of your clients - the people you influence or try to influence.
A. What can they give you?
B. What do you offer them?

III. Select a client from Step II. Evaluate objectives and SWATs of this client.

IV. Prepare for an influencing encounter with this client.

V. Conduct the influencing encounter.

VI. Prepare a report on the entire influencing experience, covering these topics:
A. Your objectives and SWATs.
B. List of clients, as defined above.
C. Objectives and SWATs of one client selected from the list.
D. How you established and maintain credibility with this client.
E. How you prepared for the influencing encounter.
F. What happened at the influencing encounter? Were there any surprises?
G. The three most important things you learned from this exercise.
H. Plans for future influencing encounters.

CONDUCTING THE INFLUENCING EXPERIENCE

In Graduate Marketing courses at Pace University, the author has assigned the material presented in this paper as homework. Students read the suggested approach, performed the required steps and brought in their written reports on the assigned date. In small classes (12 to 15 students), it was possible to have all students give oral presentations of their experiences to the entire class and to have a brief discussion of each report. In larger classes (16 to 25 students), the class was organized into groups of four and students gave simultaneous presentations to their groups. Then, volunteers from each group gave their reports a second time to the entire class. A strong majority of the students found the influencing experience useful and encouraged the instructor to continue to assign it.

REFERENCES

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