

Uncovering Treasure: Influencing with Solution Focus

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Abstract

This case study looks at using SF as a basis for a workshop on influencing (and working collaboratively). Join the authors on a journey that takes you through the design, delivery and evaluation of an innovative programme for one of the world's leading art galleries.

Introduction

Does every organisation find people complaining about meetings? As SF practitioners and trainers, we set ourselves the challenge to discover how we can support our clients in uncovering the treasures they hold within, the skills they already have. How can SF approaches help them use their time more productively when interacting at meetings?

Context

Lorraine learnt of the PLUS tool from Michael Hjerth at the Köln SOL conference in 2008. She then worked with Colin to design and run some short workshops in the UK promoting the use of PLUS as a tool for preparing more effectively for meetings.

Using Michael's model we developed PLUS for preparing for meetings using P as a reminder to prepare, L for what you would like to happen and the least that could happen, the U represents use what has worked before in similar circumstances and the S, of course, reminds us to take small steps.

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We found attendees at the workshop to be enthusiastic, and so Loraine and Colin were curious to discover whether this initial enthusiasm translated into more effective working practices and especially to more productive meetings.

These findings were presented at SOL 2010 and documented in a case study.

Following on from those findings of ‘what works’ we realised that, having prepared better for meetings, the next useful step might be for people to be more effective influencers at those meetings.

This paper describes how we designed and delivered a workshop entitled *The Art of Influencing*, building on past success of what worked when previously introducing PLUS as a model, and we report our limited findings when following up with participants a few weeks later.

This case study formed part of a workshop session at SOL 2011, looking at the integration of SF approaches in day-to-day organisational life, and we welcomed sharing experiences and comments from others.

What we did

We designed and delivered 3 workshops of 2 hours duration during the first 3 months of 2011. A total of 35 participants attended.

Those workshops were evaluated at the end of the session for ‘on the day impact’ using both a visual scale and quick few words response. We then followed up some weeks later by sending participants a short evaluation sheet, and with a few follow-up phone calls. Extracts from those responses are summarised in appendix 5.

How did we approach the design of our workshop?

We started from the premise that people in the organisations in which we work already have the innate skills necessary to influence others. They do it every day! They can listen, ask open/probing questions, build bridges and rapport and find

solutions that work. So our intention was to help them uncover these treasures, review how they could be used more explicitly when influencing others, and provide an easy mnemonic to aid recall.

As our ideas developed we came to the realisation that perhaps the most beneficial part of our intervention through a short workshop would be increased confidence for our participants. This became for us, then, one of our key measures of success.

There are already lots of influencing models in management parlance. Our aim was to develop one based on SF principles.

We wanted our participants to leave our workshop with:

- an increased awareness of the influencing skills they already had,
- a simple SF influencing framework they could use
- increased confidence.

What emerged as we prepared?

Taking 8 SF principles (Jackson & McKergow, 2007) we incorporated them into our programme delivery. The principles as we adapted and used them are shown in Appendix 1.

What emerged as we thought about the SF principles were five core tenets that became **PRESS** – our recall aid for participants:

- **Prepare:** We reminded people of PLUS and the value of preparation and focusing on best hopes for any interaction.
- **Relationship and rapport:** Both are important elements of interactions to build trust and win/win outcomes.
- **Enquire:** The key to asking useful questions to build the platform.
- **Search for common ground** and a way to move forward together towards a solution.

- **Step forward together:** Appreciate others' contribution and agree next step.

We introduced PRESS towards the end of the session to summarise the ideas that had emerged on the journey of discovery and we have printed a 'card' which we send one month after the workshop as a visual reminder.

In the spirit of SF, we asked open questions and used the responses in the room in 'real time' to facilitate learning and uncover hidden successes. Building rapport and trust with the group, we mirrored the skills we valued. We invited dialogue and interaction. The affirmation exercise we finished the session with as part of the review builds on SF methods of 'noticing' and 'complimenting' and thanking others for their contributions, so strengthening the relationship. Our outline session plan is included as Appendix 2.

How did our participants respond?

Prior to the workshop, we asked participants to think about how they hoped the session would be useful for them and how confident they felt in influencing others.

At the beginning of the workshop, we asked all participants to place a numbered spot on the scale on the wall indicating their *current* level of confidence in influencing for a successful outcome.

At the end of the session we invited them to place a similarly numbered spot on the scale beneath indicating how confident they felt now. This enabled us to track changes in perception. Photos of some of the charts are shown in Appendix 3.

It's clear from the illustration that there were some considerable shifts in confidence, our best hopes as a starting point for change. Noticeably, those placing themselves with lowest confidence levels at the start of the workshop appeared to make the biggest leap forward.

We found this a useful quick way to gauge instant success but claim no validity for this 'in the heat of the moment' self perception method!

Secondly we asked participants to write a few words on Post-Its® to leave with us in answer to the following two questions:

- (i) What was most useful today?
- (ii) What would have made it even better?

Some of the responses have been amalgamated for ease of transcription and are reported in Appendix 4.

Extracted from the evaluation form sent to participants some weeks after attending the workshop we noticed some increase in confidence. Participants report that better preparation helps them focus on clearer objectives and outcomes. They also recognise the value of spending time building a relationship or rapport. One can speculate whether this leads to better influencing conversations in the longer term. Extracts from the feedback can be found in Appendix 5.

Our conclusions

The opening activity, a mind map of what makes for effective influencing, found participants focusing on the importance of trust. Again and again this was mentioned. So building the platform, establishing rapport to start an influencing conversation, emerged as a key learning point for many.

We discovered participants know what they think good influencing is and can provide quite a good checklist of the skills and approaches they already have. They reported though that they find it quite difficult to remember to do these things in practice!

In the rush to get their own point across, participants reported that listening to others often gets forgotten. They therefore appreciated something to remind them of the key steps (which is where we think PLUS and PRESS can help). During the workshop the realisation that both parties often want the same thing (even if that thing looks different to their original idea), and the strength in building on common ground appeared a very powerful learning step.

Next Steps

The ‘on the day’ feedback from participants was highly enthusiastic, so validating our role as facilitators. However, our prime intention was to find out how much of this initial increase in confidence was translated into practice.

The results of our ‘one month later’ evaluation is shown in appendix 5.

It would also be interesting to discover any anecdotal evidence of interactions being more effective as a result of participants’ increased confidence and refreshing of skills. We will seek to notice opportunities for this as we interact again with participants.

We would also welcome comments from those who may have introduced the PLUS tool either in workshops or one to one situations. We wonder if anyone else has evaluated its use, take up rate, or effectiveness?

Now we are wondering, what is our next step in developing SF practices through specific skill-based workshops in organisations?

Please do get in contact if you have any data to add, or any comments or ideas. We would love to chat.

Appendix I

SF Principles or key beliefs we incorporated

- 1. It’s in the interaction:** any change, any influence, is a result of interaction . . . our conversations shape our view of the world.
- 2. Every case is different:** individuals each take from workshop what is useful to them right now: in addition as they apply the learning each time it will be different as they set out to influence.
- 3. Look for what works:** build on resources or what you already know (so for us it was, use the PLUS model).

For participants we took this to mean: build their confidence as they already had some skills.

4. **Build a platform:** search for common ground, discover what both want, and want to be different. Create rapport with open dialogue. We explained how we need rapport to create a trusting environment for exchange and genuine working together and to establish what parties already agree on.
5. **Future perfect:** put participants into a more confident situation so as they leave fired-up with both skills and new found confidence.
6. **Small steps:** in influencing and in building confidence.
7. **Appreciation:** We underlined the importance of thanking someone for their time and willingness to discuss an issue even if not yet reaching agreement or satisfactory outcome: reciprocity and relationship building.
8. **Scaling:** We used a scale for identifying current level of confidence and to measure change 'in the moment' as a result of workshop.

Appendix 2

Our session plan for the 2-hour *Art of Influencing Learning Bite* Approx. timings are in brackets.

Introduction (10)

The people, session, aims, agenda etc.

Scaling wall chart: 'How confident are you in your ability to influence?'

What is good influencing? What works already? (15)

Open with **activity** to check out what they think good influencing is – what happened, what did they do, what did they

notice others doing etc.

Uncover what works already.

Tease out/introduce concepts of win/win and reciprocity.

Every case is different: it is in the interaction (20)

Are you open minded and ready to listen?

Build rapport.

Demo and/or handout and explain useful questions at this stage.

Tease out the fact that you need to prepare, so . . .

Need to prepare; building a platform (20)

Remind them of PLUS.

Know yourself first what you want/need then enquire of other.

Activity – Ask group to think about what sort of holiday they prefer – three options (city, activity, beach) then talk to someone else and find out what’s going on for them.

Finding and building on common ground (25)

Explain and demo how to do this with example questions that might be useful.

Activity – Give them a chance to practise (link to holiday?)

Find out what’s important to you and the others.

Enquire about/establish the future perfect for all parties . . .

link to . . .

Establish what you agree on rather than what you don’t (joint starting point).

Importance of listening.

Getting alignment for moving forward: small steps (15)

Useful questions, such as ‘just suppose . . .’ or ‘what do you think?’.

Video clip 3 aspects of communication: mention reciprocity.

Clarity about what happens next: the next step.

Affirmation – accept that we’ve made progress even if not total agreement.

Activity – compliments in pairs : One thing I have noticed today that shows me you will be an even better influencer is . . .

Session review and practicing appreciation (15)

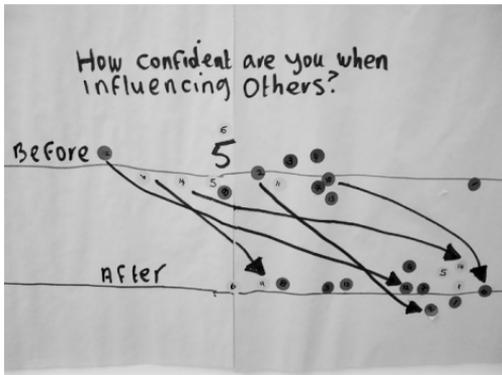
PRESS – Applying back at work – meetings or team setting?
When can you use it next?

Activity – Instant evaluation of session – re-scale confidence level and session usefulness.

Appendix 3

Photo of sample chart showing how participants' confidence levels changed during the session.

Idea for next time: It would be useful to have had a dialogue to tease out what had happened to create the shift they indicate.



Appendix 4 – ‘On the day’ feedback

| What was most useful? | What would have made it even better? |
|--|---|
| Just having time to reflect (as well as test and expand skills) | Thinking of possible examples of good influencing before the training [they were actually asked to do this] |
| To see many like-minded people | Relate to job a little more |
| Timing was great – a lot has been covered in the time we had | No immediate thoughts – well done!! |
| I found the common ground concept useful and liked the rapport + chart | Would like to watch all of video |
| Concentrating on the technique of finding common ground and rapport | An element looking at influencing larger teams/groups rather than individuals |
| Holiday exercise on enquiring (search for common ground) | Look at differences between internal and external influencing |
| Key words linked to word ‘influence’ | Role play on a work-related/more contentious issue rather than holiday |
| The 3 rules of communication (DVD) | Longer session – just getting started! |
| Tips on how to listen and search for common ground | A few more physical tools or examples of situations to use tools in |
| Idea of building rapport | Perhaps not 2 mnemonics: PLUS & PRESS in 2 hours so can reflect on one some more |
| Setting other people’s opinions/ideas; Sharing experiences | A real life case study using these techniques perhaps? |

| | |
|--|---|
| Learning to recognise how we use skills we already have to gain confidence | Specific scenarios to work through –i.e. role play or do's and don'ts |
| All aspects were very useful. Enjoyed the varied tasks | To have suggestions from different organisations |
| Having mnemonics on the skills of influencing | Possibly the chance to think about difficult situations we've been in and how we might tackle these |
| The PLUS and PRESS tools | More activities which include the whole group – better to work in groups of 3/4 |
| Purpose – thinking about it in advance | To ask if anyone has past experience which they could look at for suggestions |
| PLUS – understanding what you want: the outcomes and purpose | Opportunity to role play and test techniques ourselves: only possible in a longer session |
| PLUS! Learning from others | Very hard to criticise – very well delivered, helpful and constructive |
| Clear outline of the whole process – PRESS | Thinking of possible examples of good influencing before the training [they were asked to do this] |

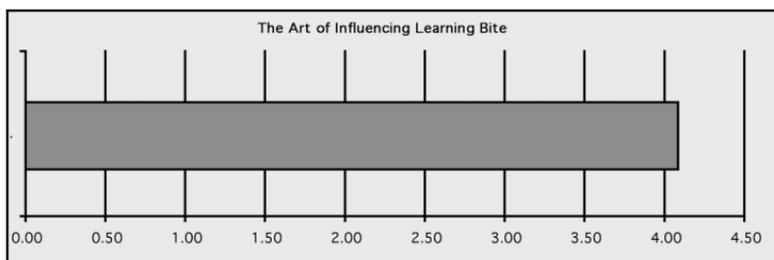
Appendix 5

Feedback two months later

Question 1

On a scale of 1 (low) – 5 (high), how useful was this Learning Bite for you?

| | | | | | |
|-----------------|---|---|---|---|---|
| Answer Options: | 1 | 2 | 3 | 4 | 5 |
| Responses: | 0 | 0 | 2 | 8 | 3 |



What specifically enabled you to give this score?

- Reminder of PLUS and intro to other tools.
- The teaching of the PLUS system.
- It unpicked a specific skill that I can apply to various aspects of life – both work and social situations.
- Lots of things to consider re what influencing is about and also some tips to use when you are actually influencing.
- Good length of ‘bite’ and some useful tips taken away.
- I don’t feel as if the course has specifically been of benefit or improved my influencing skills although some useful tips and suggestions.
- To formalise ways in which to influence people.
- The course provided an excellent technique as to how to structure a conversation on a difficult topic.
- It allowed me to recognise my existing skills in this area and consciously use them to improve my work.
- The Learning Bite helped me develop skills in influencing people (both colleagues and external relationships).
- The fact that you always get useful, quick tips on this type of course.

Question 2

What would need to be different for this score to be higher?

- Maybe ask in advance to think of when you need to influence in the next week?
- I can't think of anything in particular.
- Perhaps 2 shorter sessions with 'homework' tasks to complete in real situations, i.e. time to 'practise', reflect then share experiences.
- Some of the sessions seemed a little rushed, I would have preferred more time to discuss some of the theory being presented.
- More direction and examples on how to influence in practical terms rather than lots of group work.
- Perhaps more activities that were work related – like role play exercises.
- Possibly a slightly longer session.

Question 3

What difference(s) have you noticed since the influencing workshop in the conversations you have been having? (For example, – how have you noticed yourself preparing or thinking before such an interaction?)

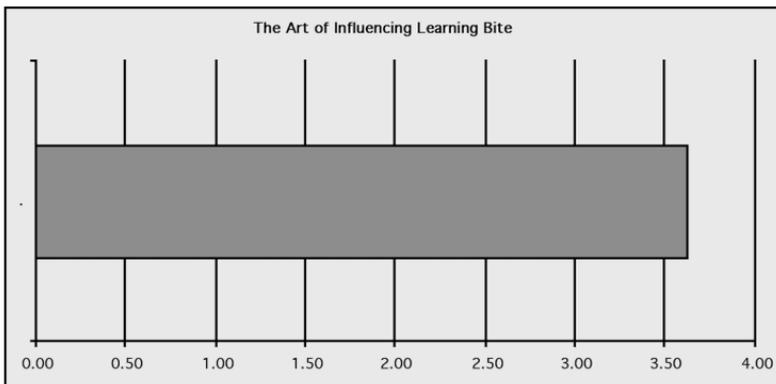
- Preparing more. Thinking about desired outcomes. Thinking win win.
- Have thought about preparation for meetings more.
- Have been more confidently directing meetings and pushing the outcome that I want using the influencing skills.
- PRESS.
- Making personal notes/agenda regarding benefits in preparation.
- Tried to concentrate on building relationships prior to influencing situations and realised that I can always

walk away and deal with the situation at a different time if it becomes heated.

- Yes. I have noticed I think more about how to prepare for a meeting.
- The PLUS model is excellent and I use this all of the time.
- Tailoring the ways in which I communicate with people before influencing them, be clear on purpose of influencing.
- I have planned the conversation using the 'PLUS' framework.
- Thinking before an interaction – just being conscious of how to use these skills.
- I have concentrated on improving rapport which will help me improve my influencing skills.
- Prepare more and able to delegate.

Question 4

On a scale of 1 (low) – 5 (high), how confident now are you in successfully influencing others to achieve a satisfactory outcome?



Question 5

How has that helped you achieve more success in influencing conversations?

- Just more awareness. Having clarity of the aim.
- Clearer objectives.
- I have been more successful in persuading seniors of my opinions on things for campaigns to go forward.
- Helps to focus on positive outcome.
- Less stressful, smoother discussions.
- Not sure that this has helped me in influencing conversations.
- By appealing to their better nature and communicating in a way that they respond to, I find that people are more likely to come round to another point of view.
- I've had a clear objective for the conversation.
- I feel more confident in my ability to influence and control a situation.
- Improving rapport with fellow staff enables us to come to mutual agreements more easily.
- Given me time to produce the facts.

References:

- Hjerth, M. (2011, October 23). *Micro Tools*. Retrieved from <http://www.solworld.org/group/microtoolsandtheplusmodel/forum/topics/2102269:Topic:3785>
- Jackson, P. Z., & McKergow, M. (2007). *The Solutions Focus: The SIMPLE way to positive change*. London: Nicholas Brealey Publishing.

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