Want Influence?
Eliminate Your Blind Spots

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Fictional Story = Real Problem

To illustrate this point, let's take a page from an episode of the popular television program *The West Wing*.[1]

A Congressional staffer asks the president's Deputy Communications Director Sam (Rob Lowe) to support an effort to eliminate the copper penny. Upon first glance, this seems straightforward: Armed with research, Sam notes to a colleague that the majority of pennies don't circulate, but instead end up in jars and sock drawers. As the episode continues, Sam finds more rational reasons for eliminating the penny, including the impact that mining copper has on the environment. He eventually concludes, "The only things pennies interact with are those machines that wrap pennies to get rid of pennies."

Sounds like case closed. Goodbye penny. But Sam is making a rookie mistake. He is underestimating how the decision to eliminate the penny will happen and by whom. As his colleague, Josh, succinctly points out, Sam's argument for eliminating the penny—even though backed by facts—will never be approved by the House of Representatives:

Josh: Sam, where is the Speaker of the House from?
Sam: Illinois.
Josh: Land of Lincoln.

Going after the penny would mean going after Lincoln's legacy and could have significant political fallout for the Speaker. This effort, which at first seemed pretty straightforward, just got really complicated.

View from Here

Although this is a storyline from a television show, it exemplifies a common challenge of many advocacy organizations. As these groups work to create change, they each need a strategy for influencing the ultimate decision maker. While the end result varies widely – from ensuring more women schedule regular mammograms to securing policies that provide affordable public transit to convincing companies to pay fair wages—success is directly tied to influencing a targeted person or set of people.

> Most social change plans note the end goal, "To succeed, we will need to influence x, y and z to do what we want."
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> Unfortunately, they often stop there and fail to outline a plan for how they will create that influence.
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> How will they convince more women to get regular check-ups? Why will their approach to getting more workers to take public transportation actually lead to more workers boarding a bus or jumping a train? What do they know about small businesses that they can use to get their backing for an important initiative? Even organizations with highly sophisticated strategies often fail to consider how they will actually influence the audiences they need to reach in order to create their desired change.
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> When an issue is straightforward, a detailed articulation about how influence will happen isn't necessary. For example, if parents of elementary school kids find out that their children's school is full of lead paint, they can pursue a straight-forward influence effort: Parents will bring evidence to the principal, who will respond with a plan of action and a request for remediation from the school board. The school board, afraid of lawsuits, will comply.

Other issues, however, can be far more challenging. Charting the influence that needs to happen is a trickier proposition, and there are many challenges an organization must contend with to succeed. We dub these "blind spots" and they can undermine a change strategy. This guide is meant to help nonprofits and foundations successfully navigate a more difficult trail of influence by identifying—and eliminating—blind spots before they sabotage their change strategies.

1. *The West Wing* is a television series created by Aaron Sorkin that originally ran on NBC from 1999 to 2006. The series focuses on events happening in the West Wing of the White House during the fictional Democratic administration of Josiah Bartlet (played by Martin Sheen).

The Blind Spots

Many groups find themselves in Sam's situation. They are trying to tackle difficult, complex issues, and they need to use influence as effectively as possible. Even the most well-intentioned groups, who have smart people with the knowledge needed to craft smart influence strategies, can end up with blind spots.

How do blind spots sneak into change strategies? Here are some top culprits:

1. **THE FAST AND FURIOUS.** Groups start fast and don't do their homework. They don't completely think through the influence question, assuming they can safely figure it out as they go along, or "build the plane while flying it." The consequence of this approach is that these groups fail to take the time to understand upfront how decisions will get made, and while they may get lucky, their efforts are inefficient and not as strong as they could be.

2. **READY, FIRE, AIM.** This is a close cousin to those in the fast and furious category. Here, groups handicap their efforts by making strategic decisions out of order. For example, some groups form a coalition before they identify which decision makers they need to influence or on what grounds they will make their case. Rather than crafting a strategy based on the interests and passions of the decision maker and then picking the strongest partners to bring that strategy to life, they are stuck developing an approach based on the assets and self-interest of the partners already assembled.

3. **THE UPSIDERS.** This crew only sees the upside and approach influence with rose-colored glasses. They don't look at who stands to lose if their campaign is successful. The Upsiders don't think about who is working against their effort, publicly or behind the scenes. The consequence? By not seeing any downsides, the group leaves itself vulnerable to opponents it doesn't even realize it has.

4. **THE OVER ESTIMATORS.** These folks overestimate a decision maker's willingness to step out on a difficult issue. They overestimate what they have to work with, such as relationships or credibility. They overestimate the simplicity of influence and as a consequence underestimate the difficulty of tasks necessary for their proposal to get traction. They never stop to ask: "If this is such a no brainer, why hasn't it happened yet?"

5. **THE NARROW FIELD OF DREAMERS.** These groups lack objectivity. They pick and choose which facts support the idea that influence is possible, but they dismiss any evidence to the contrary. Buoyed by selective facts and a perceived urgency that may or may not be there, these groups end up with an effort based on fantasy rather than reality.

6. **THE GUT REACTORS.** These organizations think the decision will get made for certain reasons (e.g., moral imperative) when, actually, it will be based on something entirely different (e.g., job creation). They lament, "Why do people act against their own self-interest?" The truth is the people in question are acting in their own interest—it's just not the interest the group thought it would be. If their gut is wrong, these groups will end up on the sideline of an important debate rather than front and center.

7. **NO GPS CREW.** Some efforts just get lost. Pick any mix of the culprits above, and you'll find them present and accounted for here. The group picked the wrong decision at the wrong time, misjudged how complicated it would get, or chose the wrong grounds for arguing its case. Instead of stopping, taking stock and trying a new direction, they keep plugging away. At best, these efforts are futile and waste valuable resources. At worst, they end up alienating the very partners, champions and potential supporters that they will ultimately need to succeed.

The Four Elements Needed to Eliminate Blind Spots and Craft Successful Influence Strategies

For organizations to successfully influence the change they are trying to make, they need to clear away any and all blind spots that will make wielding influence difficult if not impossible. Developing a clear influence strategy requires thinking through four critical elements:

1. A clear sense of the decision(s) that need to get made
2. An understanding of who makes the necessary decision(s)
3. An informed hypothesis about how the decision(s) will get made
4. An understanding of how the organization can influence the decision-making process and a gameplan for making that happen.

To create a successful influence strategy, groups need to start by gathering the people in their organizations and in their networks who have the knowledge to think through these four elements. Here are expanded explanations for each element and some questions to explore and examples to consider to help think these through.

1 **A CLEAR SENSE OF THE DECISION(S) THAT NEED TO GET MADE.** This could be a behavior change, such as a person needing to decide to wear a seat belt or a bike helmet. It could be a policy change that a group needs to build momentum for. It could be a business decision, such as a company opting to offer transit benefits to employees, or a series of decisions, such as becoming a more sustainable company. Any successful change effort must start with a clear sense of what decisions need to get made in order to create the desired change. If it's a set of decisions, what's the sequence of events that will ensure one builds on the next? The more complicated a situation, the more clearly a group needs to define necessary decisions.

If an organization wants to protect endangered sea turtles from unnecessary slaughter in the next three years, it can identify several potential decisions that prevent slaughters. The government can decide to issue a closure of a known turtle nesting area for the three months the turtles are there. Fishermen can decide to use turtle-friendly gear. Local residents can decide to help with enforcement by reporting violations of either fishing restrictions or gear requirements. These are three distinct decisions that are necessary to help achieve its goal of protecting more turtles. Each decision will be made by different people, based on different factors, and will require different influence campaigns.

A group can consider the following questions to identify the decisions it wants made:

- Within what time parameter will the decisions happen, e.g., over one year, three years, five years?
- What are the key decisions that will realistically be made during this time period (because they are already planned or because they can be forced/encouraged) that will make a significant difference?
- Has the organization considered all the options, e.g., policy change, citizen/consumer action, corporate action?
- Does the organization have the capacity, resources and expertise to influence all of the decisions identified, or does it want to prioritize some over others?
- Are the decisions likely to happen in a specific order, or does the group want the decisions made in a certain order for strategic reasons?

Case Study Part 1: The Decision

In 2005, the Pew Charitable Trusts wanted to designate marine reserves in American waters. Considering where it might be possible, it honed in on Hawaii. There was a 300,000 square km area that was biologically important and not heavily used by the fishing industry. Pew set its sights on **getting this area declared a marine reserve.**

2 **AN UNDERSTANDING OF WHO MAKES THE NECESSARY DECISION(S).** Once a group has determined what decisions need to get made, it must clearly identify who will make those decisions. Sometimes this is an obvious answer, e.g., only a governor has the authority to issue an executive order impacting prison policy in his or her state. In other situations, there may be multiple potential decision makers, and the group will need to make a strategic choice about which decision maker(s) to target. For example, if an organization wants more people to take public transportation, it could target young people in urban centers who may be more willing to try new things, or it could focus on getting employers to adopt policies that provide incentives to get workers to take transit. Or, if it has the resources, it can choose to go after both, as long as it is prepared to pursue two different paths: One focused on young people and a separate effort focused on businesses. The most important thing to note is that people, not institutions, make decisions.

Once a group determines what decision(s) must be made, it can identify the likely decision makers. As noted above, sometimes this is an obvious choice, e.g., if an organization wants to get Apple to improve working conditions in overseas factories, it can press the CEO to make that decision. However, sometimes an organization may need to choose where to best focus its efforts. Going back to the turtles, if an organization wants the government to enact a fishery closure for a three-month period while turtles are nesting, the organization may choose to approach this federally through National Oceanic and Atmospheric Administration (NOAA) and its administrator, through state government via the head of the department of fisheries, or even by county if there is an option to do so. An organization will need to research which option is most effective and viable, and may even choose to pursue more than one to hedge its bets.

Below are questions to explore to help identify main decision makers:

- For each decision needed, who are the possible decision makers? Focus on those who ultimately decide. Organizations should be able to name names—if they're not sure who in an institution is best to focus on, that's a good sign that they need to do more research.
- Of the possible decision makers, which one(s) are the most promising in terms of making decisions that benefit the organization's change campaign? Find avenues that offer a glimmer of hope.
- If the organization has identified a large group (e.g., mothers, voters, educators), is there a way to hone in on the true decision makers via polling data, leadership positions, etc.?

Case Study Part 2: The Decision Maker

When Pew decided to press for a Hawaiian marine reserve, it realized the National Marine Fisheries Service (NMFS) was scheduled to issue a report that could recommend that the area be declared a marine reserve. For this decision to make it into the report, Pew knew the White House, specifically **President George W. Bush**, needed to support this recommendation. Pew staff met with the head of the Center on Environmental Quality (CEQ) and asked what was needed to garner the President's support. The answer: The governor of Hawaii needed to support it. Now Pew had clear marching orders. It needed to get the governor to support the marine reserve, and then the President would support it when NMFS issued its recommendation.

3 **AN INFORMED HYPOTHESIS ABOUT HOW THE DECISION(S) WILL GET MADE.** An organization needs to understand how the decision(s) is likely to get made. On what grounds will it be decided? Who will be asked to provide input? What pressure points are at play? When will the decision get made? This is an art—not a science—but an organization needs a best guess hypothesis that will guide how the organization approaches everything from establishing a timeline to defining partners to developing compelling talking points. This will all be determined based on who is ultimately making the decision. It is critical for organization to have a clear understanding of the decision maker's values, allegiances, preconceptions and misconceptions. Without knowing what the decision makers may bring to the table, the organization's change campaign will likely fail.

This is an area where nearly every group should spend more time. Some groups tend to assume that the problem is so obvious, all they need to do is point to the solution and the decision maker will automatically agree. Unfortunately, this rarely happens. Sometimes a group tells a decision maker, "This is a problem." And the decision maker replies, "Says who?" The decision maker may have heard from others with contrary opinions, or may hold values or perceptions that are counter to what the group wants.

A big question to explore is whether the group will have the opportunity to set the agenda that could lead to change, or if the agenda has already been set and the organization will need to focus on and influence the alternatives already under consideration.

Where are the pressure points?

A group tells the decision maker that a problem is urgent, but the decision maker has other (possibly conflicting) priorities and disregards what the group is saying. Consider the home emergency kit: Most people have heard repeated warnings about how important it is to have a kit filled with a flashlight, fresh water and other basic necessities, but they tune out. Until the lights go out or their water runs brown, they have more immediate concerns competing for their attention.

In some cases, a group may underestimate the powerful interests their influence needs to overcome. By miscalculating the power of counter-messages, groups end up knowing who they need to influence but fail to understand the calculus of how the decision will get made. For example, a well-meaning nutrition group makes the case for healthier school lunches. But a school isn't just deciding what to serve based on calorie count; they also receive a lot of money from vending-machine companies selling soda and snacks, and they have large, lucrative contracts with food service suppliers for the cafeterias. When a school considers a change, these interests use their own influence to pursue their own agendas. The group working for better nutrition needs to know this, anticipate the pressure the school decision makers will feel, and develop a plan to out-maneuver the opposition.

On what grounds will the decision get made?

Groups also misunderstand the grounds upon which the decision will get made. Groups lament when voters turn down a ballot initiative that could provide needed revenue for schools, even when the voters say education is a top state priority. But the decision isn't made based on education considerations alone—it's made based on whether people are willing to pay more taxes, and the answer to more taxes is often no.

There are many books and experts that offer insights about how people will respond to appeals for change and how to navigate the labyrinths of the human mind in a way that builds the support needed. *In Immunity to Change,* by Professors Kegan and Lahey,[2] the authors explore why people often don't embrace change, even when it is in their self interest. It isn't because people are lazy or unconcerned; rather, it is usually for compelling, well-intentioned reasons that are rooted in strong beliefs and values. So when groups don't understand why their target decision makers aren't willing to change, they find it nearly impossible to communicate in a way that will convince decision makers to do what needs to be done.

Dan Kahan, a professor at Yale University and member of the Cultural Cognition Project,[3] warns that people interpret information and facts in a way that reinforces their cultural identity. They engage in motivated reasoning. To successfully engage their audiences, organizations need to find ways to reinforce the cultural values these audiences hold most dear—not challenge or threaten these images and beliefs. Behavioral economist Dan Ariely[4] writes about how people are "predictably irrational," and he offers insights into why people make the decisions they do. (For a list of additional gurus to turn to for insights, see appendix A.) To succeed, organizations need to factor these types of scientific insights into their influence efforts.

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2. Robert Kegan and Lisa Lahey, *Immunity to Change: How to Overcome It and Unlock the Potential in Yourself and Your Organization* (Leadership for the Common Good) (Harvard Business School 2009)
3. Cultural Cognition Project at Yale University, http://www.culturalcognition.net/
4. Dan Ariely, *Predictably Irrational, Revised and Expanded Edition: The Hidden Forces That Shape Our Decisions* (Harper Perennial, 2010).

Questions to ask to understand how a decision will get made:

- What is the impetus for making the decision (e.g., it has to be made, such as federal appropriations to keep government operating; it can be made a priority by having influential constituencies call for it; or someone sees it in their self interest)?
- If there is no impetus, can impetus be created?
- What additional information will inform the decision (e.g., polling, reports or data, whether a citizen or customer is calling/emailing about it)?
- Who will be consulted to weigh in on the proposed decision (e.g., experts, issue leaders, businesses, peers)?
- What are the top considerations for making the decision (e.g., is this an economic decision, a moral decision, and/or a health decision)?
- Considering how the decision will get made, who can credibly exert pressure (e.g., if a moral decision, who has the moral authority to weigh in)?
- What incentives does the decision maker have for making the decision the way the organization wants (e.g., will it be popular, save money, offer protection)?
- What are the disincentives or barriers (will it cost money, be unpopular, cause unrest)?
- When will the decision likely be made (is there a set date, an approximate timeframe, or is it open ended)?
- Who would be the winners of the decision and potential allies (e.g., who else benefits)?
- Who would be the losers and potential opposition?

Case Study Part 3: Hypothesis of Influence

Pew went to Hawaii and **worked to secure the governor's support** for the marine reserve. Staff ensured key people who were highly influential to the governor were supportive. They asked a variety of people involved in the project, "Who needs to support this for the governor to support it?" They minimized potential opposition to their proposal by picking an area of water that only had eight fishing vessels. One important decision they made was to not attempt to engage the state legislature. After initially trying to work with legislative offices, they realized that if legislators started to weigh in, it would complicate the entire process by making it a partisan issue. Last, Pew kept close track of the actual decision. At some point it became a concern that the NMFS would never issue the report Pew needed to make the recommendation about the reserve. They needed a new way to get the president to consider the recommendation. Rather than retreat, Pew **used the support it had with the governor and went back to CEQ.** Realizing the opportunity, CEQ recommended the President issue an executive order. In 2006, he did. The largest marine reserve in U.S. history was established by a president not known for his interest in environmental protection.

4 **AN UNDERSTANDING OF HOW THE ORGANIZATION CAN INFLUENCE THE DECISION-MAKING PROCESS AND A GAME PLAN FOR MAKING IT HAPPEN.** With a clear understanding of how the decision will get made, the group needs to honestly assess its strengths, networks, reputation and reach to decide if and how it can influence the decision-making process. For example, if a group that is trying to get more people to take public transportation has extensive reach among young urbanites, it should leverage that influence. If it doesn't have reach among this audience, it will need to partner with organizations that do.

Once an organization knows how a decision will likely be made, it can figure out how it can use influence—positive or negative—to get the decision it wants. At this point, organizations need to identify pressure points it can credibly weigh in on.

Here are questions to consider in order to identify pressure points an organization can credibly use:

- Can it provide information based on what it suspects the decision maker will want to review prior to making a decision? For example, does it have a relevant research report or polling data? Will the information be deemed credible?
- Is the organization or a staffer at the organization likely to be consulted, or does the group have connections to the people who will be consulted as the decision is getting made?
- Does the organization represent constituencies the decision maker will listen to when making the decision? If not, can it partner with someone who does, or can it modify what the main considerations are? For example, if the main consideration driving the decision is economic and the organization is environmental, can it partner with an economic institution to show why the decision is both environmentally and economically sound?
- Can the organization:
  - Highlight the incentives for the decision maker? Can it deliver on these incentives in short order?
  - Minimize or eliminate the disincentives or barriers?
  - Add credibility to a threat, if making a threat is part of its influence strategy?
  - Do all that is needed in time to influence the decision?
  - Identify and join forces with others who will benefit from the decision?
  - Effectively counter those who might lose and keep them from getting the upper hand in the decision-making process?

If an organization is not able to answer, "Yes" to most of the questions above, it needs to reconsider whether this is a decision it can realistically influence, or whether there is a different way to go about securing the change that will allow it to use influence more successfully.

Case Study Part 4: Point of Influence

Pew had enough standing to go to CEQ at the White House and ask straight out what it needed to get the President's support. However, Pew did not have extensive influence in Hawaii. **It used relationships with conservation groups on the ground to secure meetings with the people most influential to the governor.** In this case, it was a high-level play that didn't require mobilization of large constituencies. Pew was well suited for this kind of effort and was successful.

Taken together, these four elements give an organization its best chance of success. As organizations work to create a pathway to influence, they are likely to discover more than one path forward. Groups need to explore options. They might decide to hedge their bets and have several strategies working at the same time. Other times, they might pick the most promising path. The important thing is to make deliberate decisions. When considering options, groups must pick the ones that appear most viable, make the best use of organizational assets, and don't require concessions that compromise their missions.

Conclusion

Certainly, organizations can make headway without a clear understanding of where influence is possible, but they greatly diminish their chances of success with that approach. Instead, organizations that take the time to approach the process in a disciplined way will make far stronger strategic assessments and will enjoy a greater chance of success. Making influence an explicit part of strategies will help more groups create change they seek.