

## Making the most of influencing over the telephone

Influencing across a table used to be the norm, but today's global organisations require that we often interact virtually – by phone, conference calls, videoconferencing, email, IM, and social media. Influencing confidently using the phone can be effective if you learn a few important principles.

### **The phone is good for:**

- Speed – you can get things agreed and done without waiting to meet
- Personal contact – after face-to-face, it's the next best method of influencing
- You can set up a call to suit the situation – pre-plan and agree a time, or call with no warning for less formal situations
- You get an immediate response and can adapt your approach
- You can tell when your influence attempt has worked and stop

### **The risks of using the phone:**

- You can't be sure you will have the full attention of the other person
- The phone isn't really suitable for conveying complex information or ideas – you may need to send briefing documents in advance of a call
- If you're not skillful at picking up non-verbal cues you might miss something important
- Unless you're calling by prior arrangement, it might be difficult to catch the person

### **Tips for using the phone for Influence:**

- Plan for influence as if you were meeting and use the full range of behaviours available to achieve your objective
- Use the Influence Planning Process
  - Clarify your objective
  - Clarify the context
  - Decide on the most important statement to meet your objective
  - Plan the sequence of behaviours that are likely to work
  - Plan your opening – the contract and purpose are very important
  - Plan how you will end the call
- Establish a “contract” at the start of the call – is this a good time to talk? Agree the purpose, how long will it take, and check if there's anything else the other person wants to add to the agenda
- Choose where you call from carefully to suit the importance and situation
- If a call is less than optimal, acknowledge that at the start – it will create a better atmosphere for your conversation

- Your “words” (16%) and “music” (84%) will convey your message\*. Remember that your “dance” will be conveyed through your music:
  - Standing up to make an important call will give your voice more power and confidence
  - Sitting up straight will ensure your voice is not constrained and allows you to manage pace and intensity
  - Answering with a smile will give your voice a more welcoming tone
  - When you are listening try to keep your posture and energy attuned to the other person – they will feel more listened to
  - If you have been sitting, then standing up will help to signal the end of the call
- Listen carefully – you will pick up a lot from the other person’s voice
- Show that you are listening by acknowledging what the other person is saying, paraphrasing or summarising – they can’t hear a nod or shake of the head, and silence can be ambiguous
- If you sense frustration in an email, respond with a phone call – it’s more personal and attentive
- When speaking across time zones plan important calls on their schedule, not yours. Begin the call by acknowledging the other person’s time of day to establish some rapport
- You may need to offer more explanation of silences or pauses than you would in face-to-face meetings. “Being Open” will help them to understand and keep the connection between you
- Develop good habits – put your mobile (cell) phone away and close any screens that might distract you. They will know if you are not giving your full attention
- If it’s going to be a long or complicated call, arrange a time in advance. Take breaks and re-call to manage energy or content

#### Conference calls:

- Establishing a clear contract about the purpose for and process of the call is essential at the start of a conference call. For example, a different process is required if the intention is to broadcast/cascade information than if it’s a call to discuss and agree a way forward
- Ideally, set the conference call up for no longer than 1½ hours
- If there are more than 3 people taking part, agree to state your name before speaking each time so that others know who’s talking

- Agree that one of you will “chair” the call
- Develop good habits – don’t say yes to a call if you are not going to pay attention and participate
- Summarise what you have heard before putting your own point of view across
- Actively manage the contribution of others – encourage, and check for, involvement especially when seeking agreement/building commitment, and avoid time being dominated by a few.

#### References:

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