



# Strategic Influencing

TOOLKIT

# Introduction

Welcome to this Strategic Influencing Toolkit!

This reference is your go-to guide for navigating key influence moments with tact, trust, and clarity.

In this tool, you'll find:

- **Trust-building strategies**
- **Language patterns to boost effectiveness**
- **Influence approaches for differing scenarios**
- **A checklist for navigating conversations**
- **And strategies to pivot, refocus, and reframe after a rejection**

Use these tools to plan your influencing strategy and create greater impact in your professional relationships. With these tools in hand, you'll be well equipped for conversations across all levels of the organization.

# Trust-Building Foundation

Effective influence begins with trust. Build it through four key elements:

ELEMENT	DEFINITION	HOW TO DEMONSTRATE IT	LANGUAGE TIP EXAMPLE
<b>Credibility</b>	Bring expertise, data, and insights.	“Here’s what the data shows from similar organizations...”	Bring expertise, data, and insights
<b>Reliability</b>	Follow through, be consistent.	“I’ll send you a draft by Friday. Does that timing work for you?”	Follow through, be consistent
<b>Intimacy</b>	Build safety, keep confidences, foster openness.	“Thanks for being open. This will stay between us.”	Build safety, keep confidences, foster openness
<b>Other-Orientation</b>	Act in others’ best interests.	“What would make this most useful for your team?”	Act in others’ best interests

# Strategic Language Patterns

How you say what you say can make the difference between a “yes” and an “I’m not so sure.” Use these linguistic tactics to improve your influencing effectiveness:

LANGUAGE	PURPOSE	TIP	EXAMPLE
Use “We” instead of “You”	Creates shared ownership and reduces defensiveness	Avoid overusing it to deflect responsibility or create false consensus.	<ul style="list-style-type: none"> <li>“We’ve both been seeing this challenge—how do you think we should approach it together?”</li> <li>“We’re aligned on the goal. Let’s work out how to get there from both sides.”</li> </ul>
Offer transparency with “Because” or “The reason is...”	Explains rationale and adds credibility	Pair with genuine transparency. Avoid using it to defend decisions prematurely; listen first, explain second.	<ul style="list-style-type: none"> <li>“We’re focusing on this change because it addresses one of the key risks we identified last quarter.”</li> <li>“The reason this matters is it connects directly to the customer churn we’ve been tracking.”</li> </ul>
Acknowledge concerns with “I understand...” or “I had/have similar concerns...”	Addressing objections shows empathy and emotional awareness	Don’t assume concerns; create space for people to express them first.	<ul style="list-style-type: none"> <li>“I understand this might raise some questions. Can we take a minute to talk through what’s on your mind?”</li> <li>“I had similar concerns at the beginning. Can I share my thought process?”</li> </ul>
Ask before you frame with “I’d like to hear from you...” or “I want to check in with you...”	Builds trust, shows respect for others’ knowledge, and tailors your influence	Starting with a genuine question helps uncover what the other person values, which allows you to tailor your message effectively.	<ul style="list-style-type: none"> <li>“Before I share my take, I’d love to hear what stands out to you.”</li> <li>“Can I check where you’re coming from before we dive into solutions?”</li> </ul>
Lead with “What I’m hearing is...” to reflect and validate	Demonstrates active listening, reduces resistance, and encourages openness	Use to acknowledge concerns before responding or redirecting.	“What I’m hearing is that timing is your main concern. Let’s explore options to address that.”
Use “If X, then Y” conditional framing	Links actions to outcomes, making the value of engagement clearer	Keep the connection relevant and focused on business outcomes.	“If we incorporate more frontline feedback, we’re more likely to see early adoption.”
Say “Here’s what I can do...” before making requests	Shows commitment and reciprocity, making others more willing to engage	Use to balance asks with offers, especially when influencing across or upwards.	“Here’s what I can do to help streamline the process. [. . .] Will that help you execute a smooth implementation?”
Use “We” instead of “You”	Creates shared ownership and reduces defensiveness	Avoid overusing it to deflect responsibility or create false consensus.	<ul style="list-style-type: none"> <li>“We’ve both been seeing this challenge—how do you think we should approach it together?”</li> <li>“We’re aligned on the goal. Let’s work out how to get there from both sides.”</li> </ul>

# Common Influence Moments & Tactful Language

## Pushing back or offering a different view

### Use this when

You want to challenge an idea, decision, or assumption, without triggering defensiveness.

### Power/trust tip

Use softer language when trust is high or you're testing the waters. Be direct when clarity or conviction is needed.

TONE STYLE	EXAMPLE LANGUAGE
Collaborative	"Would you be open to a different take on this?"
Assertive	"I'd like to challenge that view based on recent data. Can we walk through it?"
Analytical	"Here's what I see in the numbers—do you see it differently?"

## Securing cross-functional support

### Use this when

You need time, input, or partnership from peers or other functions.

### Power/trust tip

Avoid centering your needs. Highlight mutual benefit or connect to their priorities.

TONE STYLE	EXAMPLE LANGUAGE
Collaborative	"Can I run something by you? I'd love to get your take."
Strategic	"Your input here will help us avoid downstream delays—can we align upfront?"
Assertive	"To meet the deadline, we'll need X from your team—can you confirm availability?"

## Citing shared values

### Use this when

Values are alive and well in the organization, and you know you can ground your case around common beliefs.

### Power/trust tip

If trust is fragile or values feel performative, earn credibility first by demonstrating alignment before speaking to it. Otherwise, it may come across as disingenuous or deflective.

TONE STYLE	EXAMPLE LANGUAGE
Appealing	"Standing behind this decision aligns directly with our commitment to being data first."
Challenging	"I'm concerned this approach could undercut our commitment to transparency. Can we revisit the intent?"
Aspiring	"If we're serious about sustainability, this approach helps us act instead of just signaling."

## Presenting data that challenges the status quo

### Use this when

You have insights that contradict current assumptions or approaches.

### Power/trust tip

Use logic and consequences or peer comparisons to shift thinking.

TONE STYLE	EXAMPLE LANGUAGE
Evidence based	“This trend points to a 15% increase in turnover risk—shall we explore that?”
Consequential	“If we don’t act, we’re likely looking at a 20% spike in cost and burnout.”
Peer referenced	“Other teams that flagged this early avoided major performance dips—can we take a closer look?”

## Handling resistance to policy or change in the Moment

### Use this when

You’re addressing emotional, practical, or political resistance to new ways of working.

### Power/trust tip

Don’t hide behind HR-speak. Name concerns, explain context, and involve the stakeholder.

TONE STYLE	EXAMPLE LANGUAGE
Empathetic	“I get that this isn’t an easy shift. Do you want to talk through how it affects your team?”
Contextual	“Here’s what we’re trying to prevent, based on recent issues.”
Supportive	“Let’s explore how to simplify this for your team, not make it harder.”

## Building Consensus Across Stakeholders

### Use this when

You’re aligning multiple perspectives to move forward.

### Power/trust tip

Use co-creation early; shift to decision-framing when momentum or clarity is needed.

TONE STYLE	EXAMPLE LANGUAGE
Collaborative	“Let’s co-create something that works across teams.”
Outcome oriented	“I’ve outlined a few options—let’s choose what best serves all groups.”
Clarifying	“Where do you see alignment or friction in what’s currently proposed?”

## Following Up Without Friction

### Use this when

You’re checking in on open items without damaging the relationship.

### Power/trust tip

Use softer reminders when trust is strong. When timelines are tight or trust is low, aim for clear, respectful communication that signals intent, not frustration.

TONE STYLE	EXAMPLE LANGUAGE
Polite reminder	“Just checking in—anything you need from me to move this forward?”
Time bound	“Are we still on track to finalize this by Friday?”
Clear action	“I’m aiming to wrap this up by Monday. Let me know if there’s anything I should factor in before then.”

# Influence Frameworks & Styles

Influence without authority requires flexibility. Effective influencers adjust their tone, style, and timing based on:

- The stakeholder’s mindset and decision-making style.
- The level of trust and power in the relationship.
- The stage of the conversation (exploring, aligning, or acting).

STYLE	WHEN TO LEAD WITH IT	NUANCED LANGUAGE EXAMPLES
<b>Asserting</b>	When urgency, accountability, or boundary-setting is needed	“To stay compliant, we’ll need to move forward with this approach. Let’s discuss how to make it work.”
<b>Rationalizing</b>	When logic, evidence, or business impact is central	“The data suggests this shift will cut turnover by 15%. What’s your take on that?”
<b>Negotiating</b>	When alignment or compromise is required	“Let’s look at options that support both timelines and team capacity.”
<b>Inspiring</b>	When engaging emotions, purpose, or long-term vision	“Imagine a team that feels fully trusted and supported—that’s what this could lead to.”
<b>Bridging</b>	When relationships, empathy, or trust need strengthening	“I want to understand your perspective first—what’s top of mind for you?”

## Tip

Most influence conversations blend these styles. You might open by bridging, clarify through rationale, and close by negotiating. Think of them as tools, not rules.

Imagine you’re trying to get budgetary approval for a three-day upskilling bootcamp for frontline employees. The idea has been met with a lot of resistance already. You might lead with bridging, then open up the conversation to negotiating:

“I understand that this might temporarily impact the workload for in-store personnel. How can we support our frontline staff in executing their day-to-day responsibilities while also making space for the opportunity to improve their effectiveness?”

Then, you might move on to rationalizing:

“Two years ago, our competitor implemented a similar training structure for their employees, and they’ve seen a 30% increase in return customers. What do you make of those numbers?”

Your approach to each situation will vary based on any number of factors, from the type of request you’re making to the culture of the organization to the mood of the stakeholder you’re interacting with. Developing fluency and agility with these approaches will allow you to land your message firmly and clearly and increase the chances you get your green light, whatever that might look like for your situation.

# Preparation, Conversation, Follow-Up Checklist

## BEFORE THE CONVERSATION

When you're preparing for an influencing conversation, shift from task prep to strategic mapping. Don't just plan what to say, plan how to shape the context. Consider the following:

### Stakeholder dynamics:

- Who truly holds decision-making power, and who influences them?
- What motivates this person? (e.g., performance, risk avoidance, reputation, values)
- What's their history with HR or this topic? Is there any known friction or fatigue?

### Intent and framing:

- What outcome matters most in this conversation?
- What tone do I want to bring in—curious, confident, collaborative?
- How can I connect this topic to what they care about most (business, team, personal success)?

### Barriers and leverage:

- What kind of resistance is likely? (E.g., logistical, political, emotional)
- What strategic questions can I ask to surface unspoken objections?
- Is the timing right, or should I seed this and return it later?

## DURING THE CONVERSATION

Once you begin the conversation, be sure to engage with three key factors at work in the conversation: your presence through active listening, your framing to the stakeholder in question, and the situational nuances that will impact your messaging. Influence is built moment to moment through presence, adaptability, and emotional intelligence.

### Active listening:

- “Let me play that back to check I've got it right...”
- “It sounds like [priority/tension] is a big factor—did I get that?”
- “Help me understand what success looks like from your end.”

### Framing with power awareness:

- To a senior leader: “Based on your Q3 priorities, here's a shift that might align well.”
- To a peer: “Here's what I've been exploring—would love to test this with you.”
- To a resistant stakeholder: “What would need to be true for this to feel workable to you?”

### Adapting in real time

- Where are they open vs. guarded?
- Can I pivot to a different influence style? (e.g., from inspiring to rationalizing)
- What micro-agreements can I build instead of pushing for full alignment?

## AFTER THE CONVERSATION

Follow-up is an influence moment in itself. It signals your credibility, reinforces alignment, and builds informal authority.

### Recap and action

- Send a quick recap with agreed actions, ownership, and deadlines.
- Note tone, not just tasks, e.g., “Appreciate your openness on X—looking forward to continuing that thread.”

### Visibility and recognition

- Who else needs to see that progress is happening?
- How can I give appropriate credit to reinforce shared ownership?  
“I've included Sam here—his insight shaped the approach we're testing.”

### Strategic debrief (reflection & next play)

- What landed? What didn't?
- Did I misread anything—power, timing, tone?
- What's the next right move—follow-up, reposition, escalate, pause?

# Where Influence Fails and What to Do Then

Even well-framed ideas won't always land. Influence failure is not just personal; it's political, structural, and strategic. The key is knowing what it reveals and how to respond.

1. Diagnose the why, not just the what: Before reacting or retreating, take a beat to decode the failure. Was it really about your ask, or timing, risk, or power?

Common causes of breakdown:

CATEGORY	EXAMPLES
Timing misfit	Wrong quarter, wrong forum, wrong urgency signal
Unclear power dynamics	You pitched to the wrong person or skipped an informal gatekeeper
Misaligned framing	The idea was HR-framed, not business-framed
Relational debt	Trust wasn't deep enough to challenge status quo
Political sensitivities	The ask threatens someone's turf, timeline, or control

2. Map the real power structure: If you hit a wall, step back and map the forces around the decision, not just the people in the room.

**Quick power map scan:**

- Who benefits from the current status quo?
- Who would have to say "yes" for this to move?
- Who influences those decision-makers informally?
- Who has implemented something similar and can lend political cover?

3. Rethink the idea: Sometimes it's not the politics. It's the pitch.

**Ask yourself:**

- Was the idea specific, relevant, and time-sensitive?
- Did I link it clearly to a business problem or strategic priority?
- Did I test interest before formally proposing it?

4. Manage your ego and visibility: Rejection stings, but how you show up after the rejection matters.

DO	DON'T
Keep showing up in the conversation	Disappear or wait to be invited back.
Reflect without blaming	Get defensive or overexplain.
Acknowledge without dramatizing	Take it personally or gossip later.
Ask for feedback if appropriate	Push again without repositioning.
Keep showing up in the conversation	Disappear or wait to be invited back

5. Reenter strategically or pause intentionally: If the door's not open, don't knock louder. Reframe the entry.

#### Repositioning options:

- Anchor to a new priority (“Now that retention is a bigger focus...”).
- Shift the messenger (someone with more traction or capital).
- Recast the benefit (“Let’s explore this as a cost-avoidance lever...”).
- Seed stories instead of selling solutions.
- Choose to let go until the time is right.

6. Create a Fallback Plan: If influence fails, what’s your backup move?

- What’s a lighter ask that still creates progress?
- Who else might take interest in piloting or testing this?
- How can you build informal momentum below the radar?
- What can you learn from the resistance?

7. Reflect, Reassess, and Regroup: Capture the intelligence, not just the emotion. Every failed attempt reveals something useful.

#### Debrief questions:

- Did I misread tone, timing, or power?
- What framing or style landed (or didn’t)?
- What would I do differently if I had 90 seconds again?
- What’s my next best play—escalate, ally, evolve, or exit?

### FINAL WORD



Influence without authority isn’t about pushing harder; it’s about moving smarter. With this tool in hand, you’ll be able to soften your entry, clarify your value, and deepen your impact, especially when the power isn’t formally yours.