

Get Real

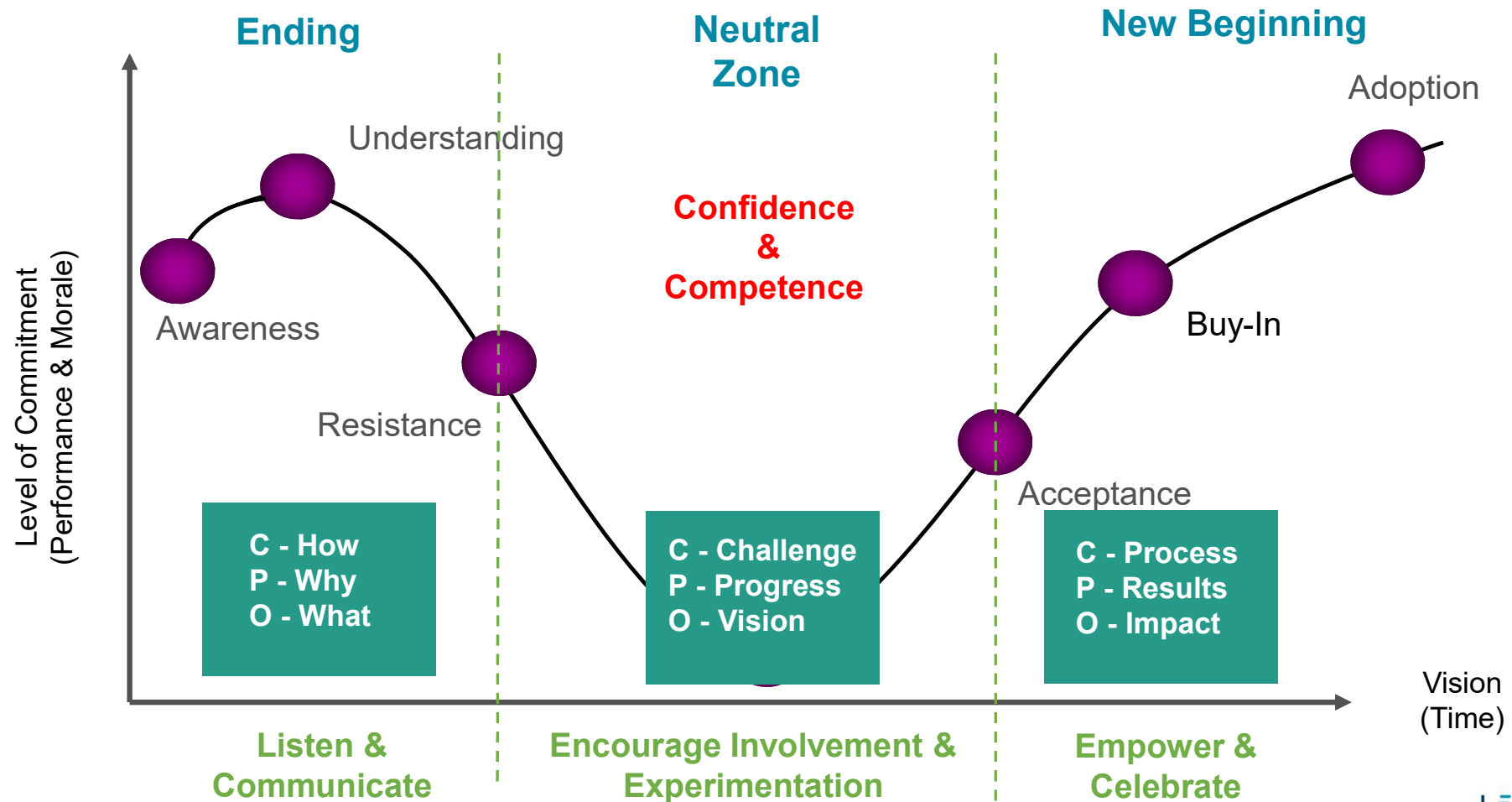
L  **BOFFE**
& ASSOCIATES



The Core Skills for Catalyzing Change

Listening, Influence & Resolving Challenges

Our ultimate goal is to influence others through change



Our stakeholders often resist change because they fear loss

We want to preserve:

- Relationships
- Role identity
- Job mastery
- Self-esteem

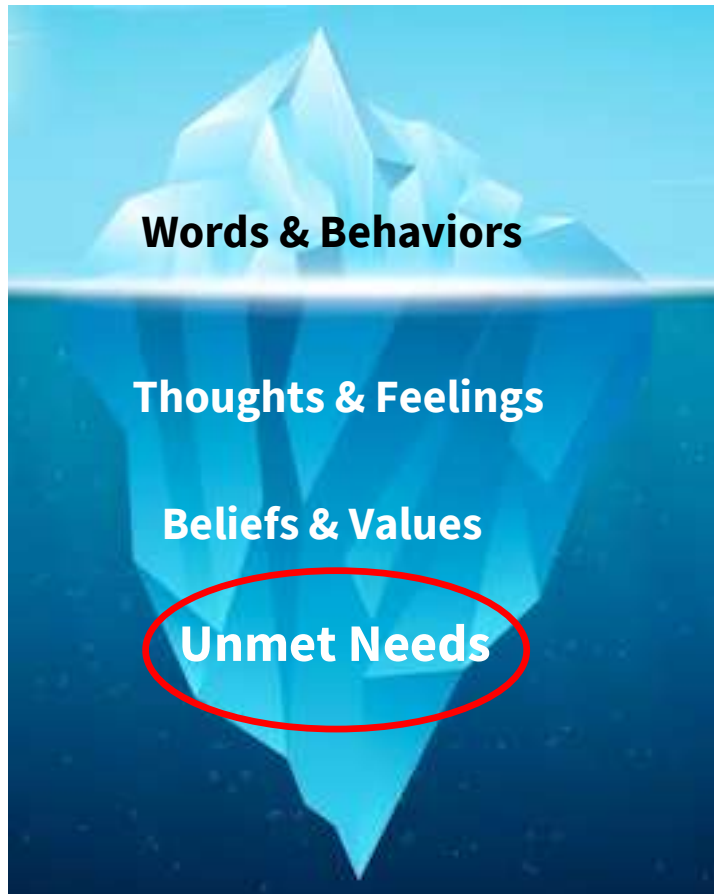
.... Things that are *comforting, familiar, and safe*



Each change style views change through a different lens

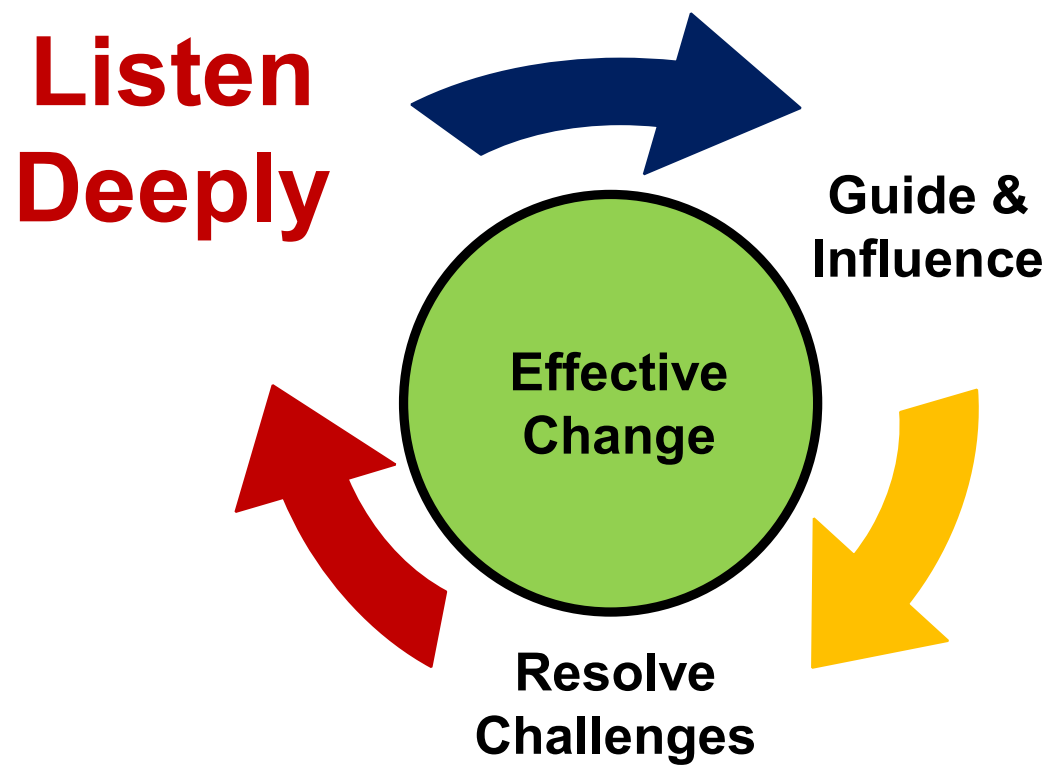
	<u>Conservator</u>	<u>Pragmatist</u>	<u>Originator</u>
Structure	<i>Accept the structure</i>	<i>Explore the structure</i>	<i>Challenge the structure</i>
Pace	<i>Prefer change that is incremental</i>	<i>Prefer change that is functional</i>	<i>Prefer change that is expansive</i>
Intent	Be effective and efficient	Do what works, given constraints	Create a brave, new, and better world
Sees Change as . . .	Risky	Necessary	Exciting

Each change style has its own needs



- All styles are **well-intended**.
- All preferences have **strengths**.
- All strengths can be **overdone**.
- All preferences can thrive through change if they have the right **environment**.
- **Our objective is to discern their drivers and unmet needs so we can influence change.**

Let's Start with Deep Listening



What might you listen for?

	Conservator	Pragmatist	Originator
Their Intent	Be effective and efficient	Do what works, given constraints	Create a brave, new, and better world
Their "Ask"	More clarity More structure More certainty	More communication More understanding More action	More energy More imagination More trust

How can you listen deeper?

- **Suspend** your agenda
- **Attend** to the other person
- **Verify** what you “heard”



This is how you suspend your agenda so you can *really* listen

- Be aware of your agenda before the conversation
- Set up the conversation so you can listen
- Notice where your focus is – on what you want to say, or on what the other person is saying.



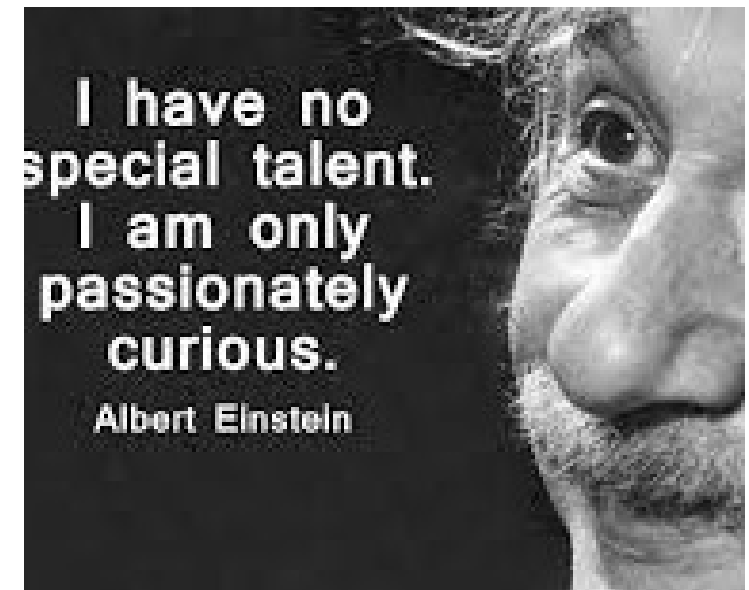
I learned to have the patience to listen when people put forward their views, even if I think those views are wrong. You can't reach a just decision in a dispute unless you listen to both sides.

— Nelson Mandela —

AZ QUOTES

This is how to attend to the other person, so *they feel heard*

- Be aware of your agenda and your own thoughts (125 vs 425)
- Listen rather than wait to speak
- Check your assumptions and get curious



It's not your fault that "Attending" can be tricky

The mind interprets patterns based on past experience

News Flash: Cambridge University Research

According to a research at Cambridge University, it doesn't matter in what order the letters in a word are, the only important thing is that the first and last letter be at the right place. The rest can be a total mess and you can still read it without problem. This is because the human mind does not read every letter by itself but the word as a whole.

By verifying what you heard, you create a “shared reality”



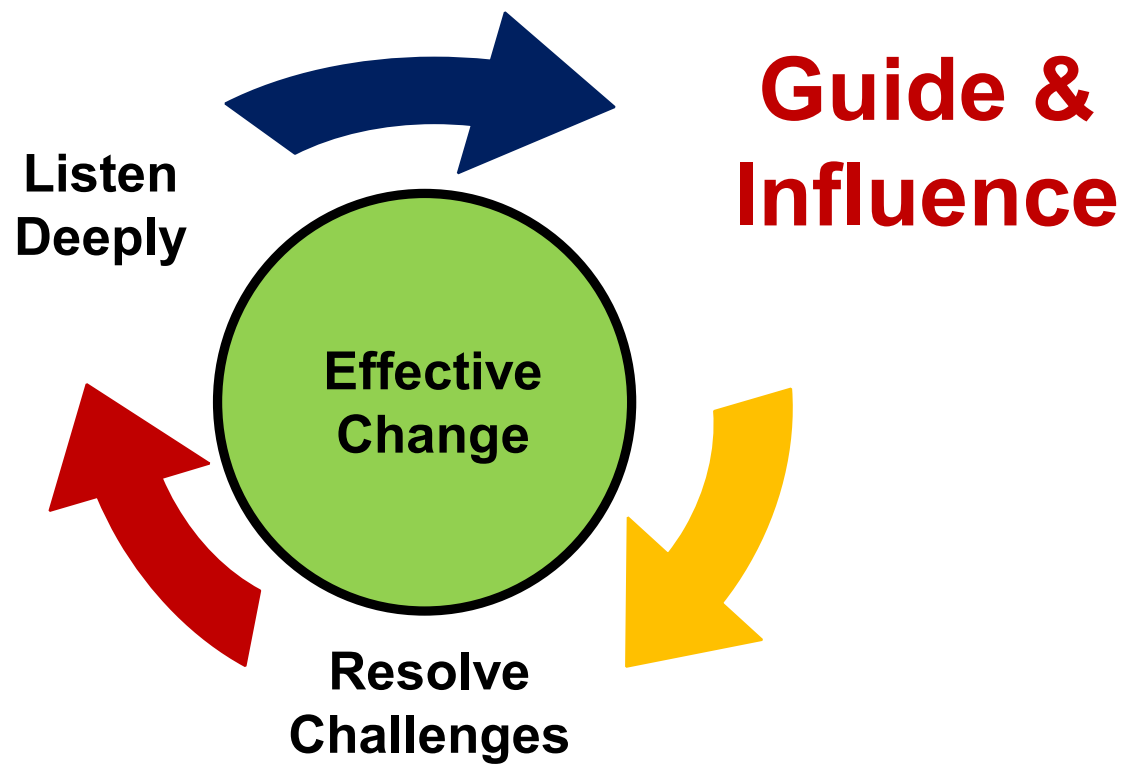
Parrot – “You’re saying the new workflow adds more manual checks, right?”

Paraphrase – “So, it sounds like your main concern isn’t the change itself, but that it might slow down deal closings.”

Summarize – “Let me make sure I’ve got this — you’re supportive of stronger controls, but you need clearer guidance on timing, ownership, and how the system changes will affect your current reports.”

Synthesize – “It seems like what you’re really highlighting is the tension between accuracy and speed — which is exactly what Strat 7 is trying to balance across all teams.”

Once we have listened, how do we influence our stakeholders?



To influence stakeholders, be strategic

- Understand their context
- Plan your approach
- Meet them where they are (so you can move them to where you are)

Give me six hours to chop down a tree and I will spend the first four sharpening the axe.

~ Abraham Lincoln



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How does influence work in your current context?

- Apart from rank or title what are the sources of power/influence?
- What are the unwritten rules for getting things done and/or gaining influence?
- What are the biggest barriers or challenges to influencing others?



What are some examples of “unspoken, unwritten rules”?

- “Never question a senior SME’s process in public.”
- “If you don’t volunteer, you don’t belong.”
- “Work happens outside 9-to-5.”
- “Data is definitive; feelings don’t count.”
- “Silence is safer than speaking up.”
- “We follow the precedent, even if it’s suboptimal.”
- “Don’t show weakness or uncertainty publicly.”
- “You owe loyalty to the team first.”
- “Good news only—bad news is delayed until you have the fix.”

To influence stakeholders, be strategic

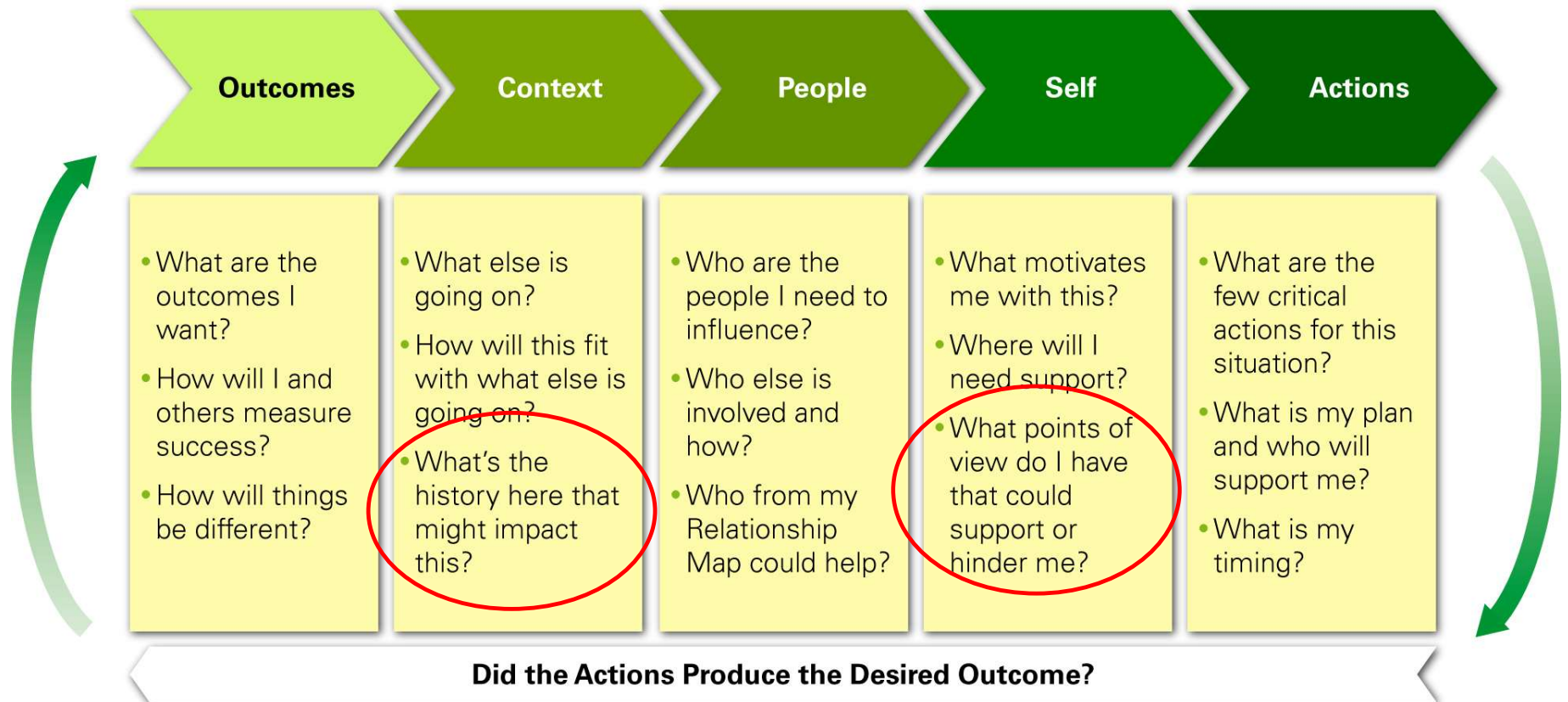
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Prepare to manage your stakeholders strategically



With the Influence Map, influence happens by design

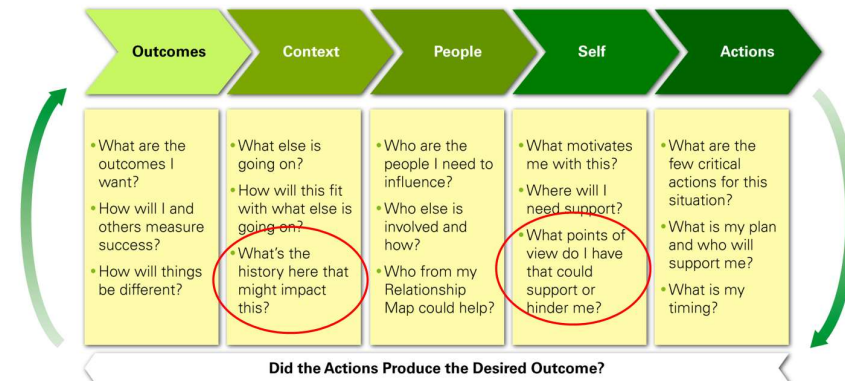
Outcome: Gain alignment and adoption across Credit, Insurance, and Technology teams for a new standardized risk reporting process.

Context:

- Competing priorities between Credit, Insurance, and Technology.
- CFO wants unified data visibility.
- Past attempts stalled.

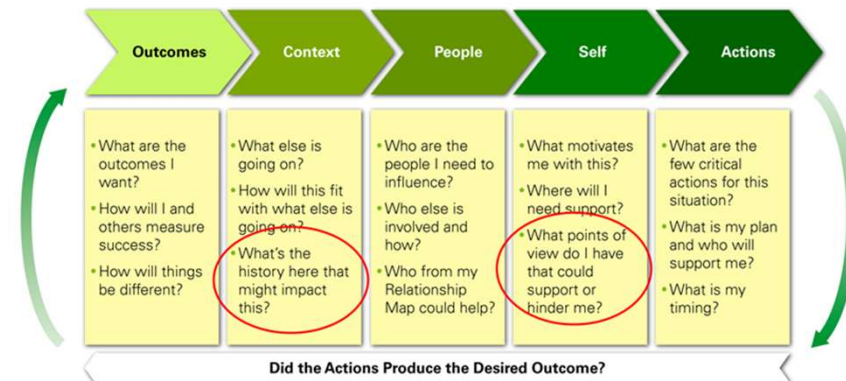
People:

- Credit Risk Lead – supportive but concerned about workload.
- Insurance Ops Manager – skeptical due to resource constraints.
- Technology Lead – open if timelines are realistic.
- Finance Director – highly supportive; wants transparency.
- Your Manager – expects collaboration and quick wins.



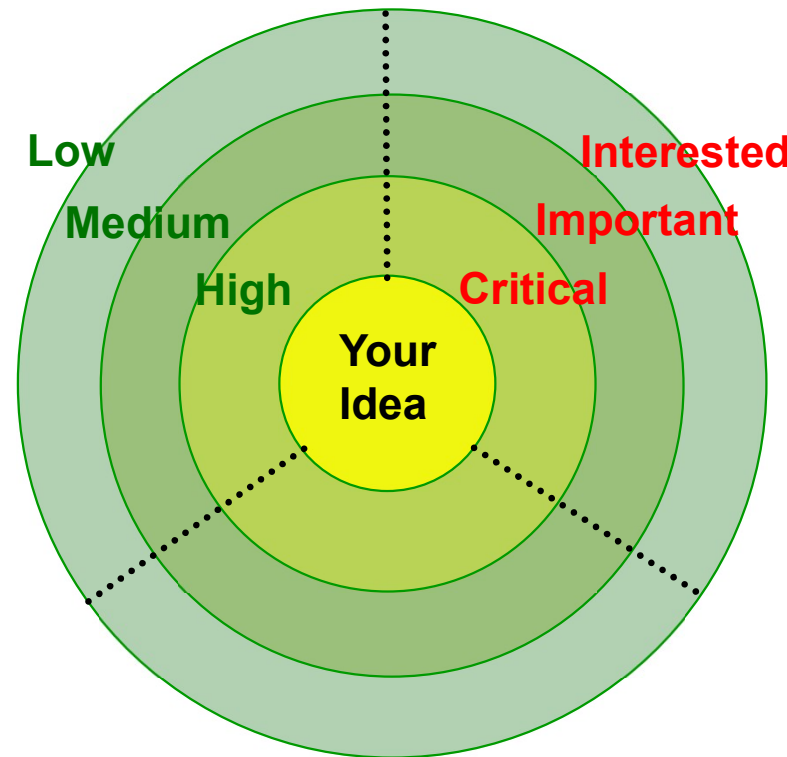
With the Influence Map, influence happens by design

- Self:
 - Strengths: Analytical credibility, cross-functional insight.
 - Watchouts: Don't like dealing with resistance, so might not lean in enough
 - Mindset: Lead with curiosity, influence through listening, get help with resistance, if stuck
- Actions:
 - Align Credit & Insurance on success metrics.
 - Meet Tech Lead for a realistic timeline.
 - Share concise updates with Finance & Manager.
 - Use early automation wins to build momentum.



A Stakeholder Map can help to focus your energy

Stakeholders you
want to influence



Stakeholders who can
help you influence

Power
Influence
Connections
Knowledge

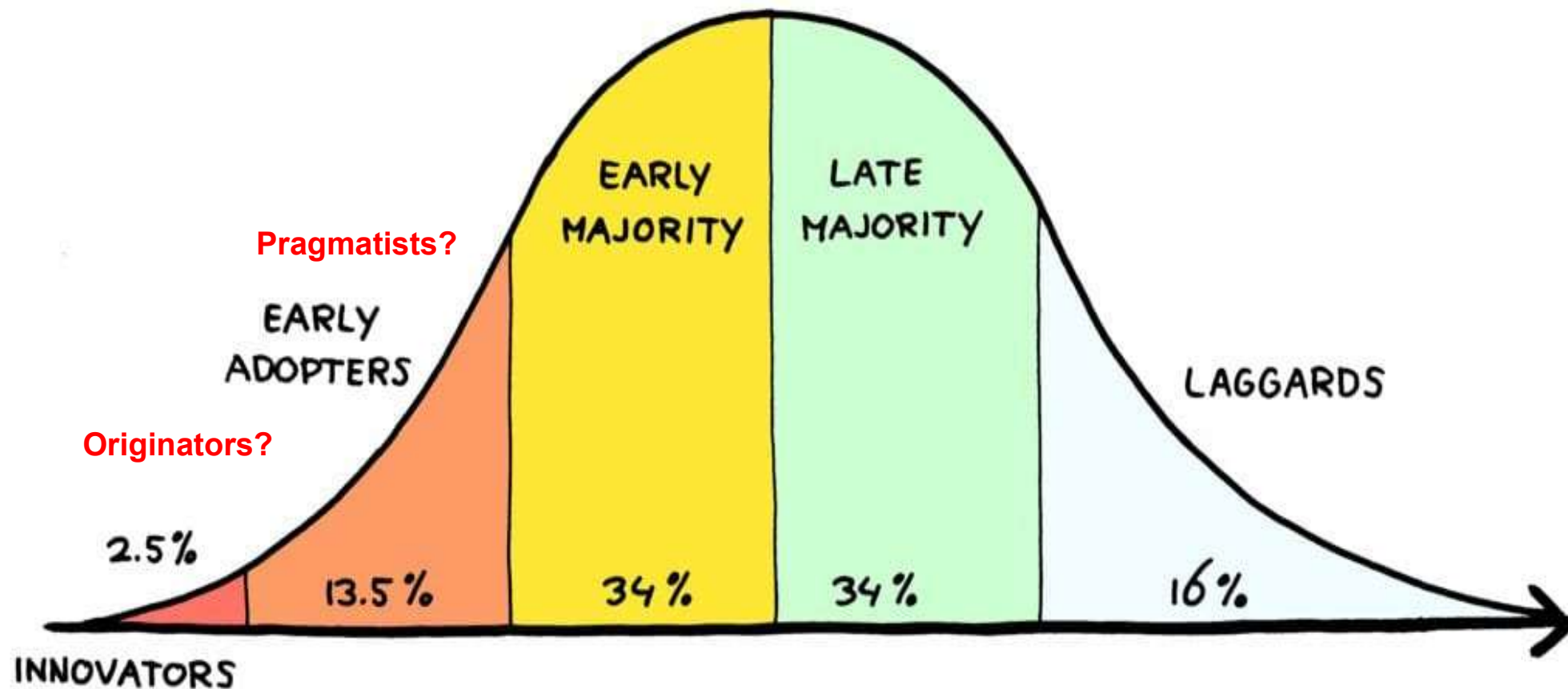
Stakeholders who
might resist your idea

Stakeholder Map Example – Automated Reporting Rollout

Scenario: A BXCI Investment Operations manager is leading the rollout of an automated reporting tool to reduce manual work and strengthen data controls ahead of the next SOC 1 audit. The map below identifies key stakeholders by their influence and relationship to the initiative.

Category	Stakeholder	Why They Fit / Example Dynamics
Stakeholders Who Can Help You Influence	Director of Compliance; Change Management Lead (Strat 7)	Provide authority and alignment with audit priorities; can reinforce the risk-reduction case and help socialize the change.
Stakeholders You Want to Influence	Senior SME in Portfolio Operations; Deal Team Associate	Have credibility with peers; their buy-in is critical for adoption and credibility of the new process.
Stakeholders Who Might Resist Your Idea	Long-tenured Settlements Lead; Technology Partner	See automation as a threat to control or workload; may resist new systems or reprioritization.

When thinking about your stakeholders, build momentum



To influence stakeholders, be strategic

- Understand their context
- Plan your approach
- **Meet them where they are (so you can move them to where you are)**

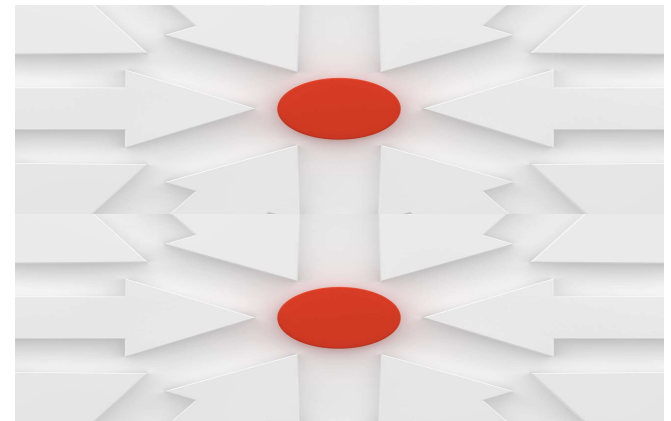
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~ Abraham Lincoln



These three steps will help you meet your stakeholders where they are

- Speak their language
- Flex your style
- Be persistent & patient
 - 7x7 Rule
 - Kotter's 10x



Meet them where they are: Speak their language

Conserver

- Know/find **relevant details**.
- Invite them to ask the **tough questions**.
- Help them understand the rules (structure), **expectations**, and next steps.
- Acknowledge their **contribution to stability**.
- Be **measured**.

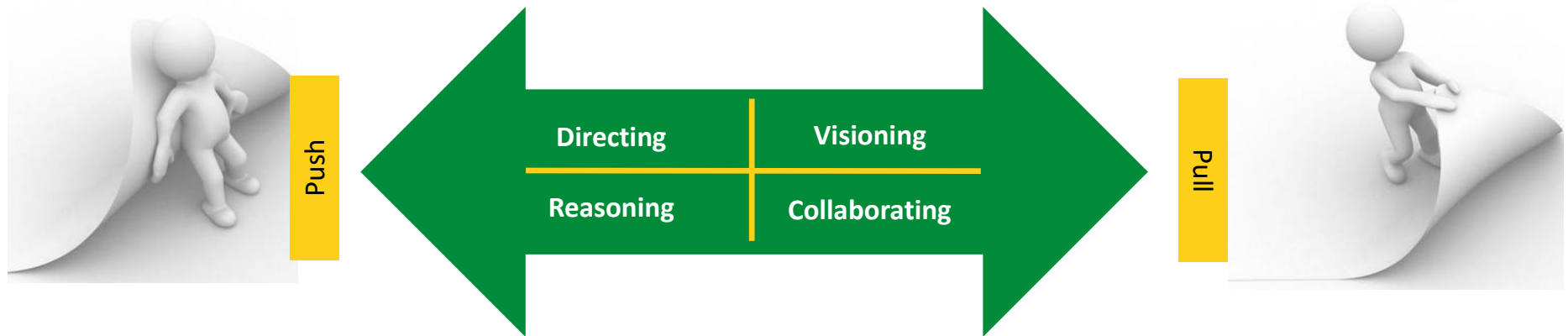
Pragmatist

- Ask **whose** input is needed to succeed.
- Ask for thoughts on how to **overcome obstacles** and make the Vision **real**.
- Validate and encourage their sense of **urgency**.
- Acknowledge their contribution to **outcomes**.
- Be **pacy** and **practical**.

Originator

- Ask for (big) **ideas** and a **picture** of a better future.
- Foster patience by reminding them of their **contribution to broad change**.
- Acknowledge their ability to manage **ambiguity and uncertainty**.
- Be **intense** and **fast paced**.

What is your preferred influencing style? What is theirs?



*Adapted from: Dent F.E. & Brent M. *Influencing: Skills and techniques for business success* (2006) Palgrave

This is an example of how you might use the influencing styles

Scenario

You're leading an effort to gain alignment and adoption for a new standardized risk-reporting process across Credit, Insurance, and Technology teams.

Reasoning – Lead with logic and evidence.

- Share data showing a 30% time savings and reduced errors.
- Use metrics to prove automation's value.
- Effective with: Credit Risk Leads, CFO.

Directing – Use authority and clarity.

- Emphasize deadlines and accountability.
- 'The CFO expects unified reporting by Q4; here's our plan.'
- Effective with: Tech or Ops teams seeking clarity/structure.

This is an example of how you might use the influencing styles

Scenario

You're leading an effort to gain alignment and adoption for a new standardized risk-reporting process across Credit, Insurance, and Technology teams.

Visioning – Inspire with purpose and possibility.

- 'Imagine real-time portfolio insights with zero rework.'
- Link to BXCI's values of precision and excellence.
- Effective with: More senior leaders, early adopters.

Collaborating – Build alignment through inclusion.

- Host a short workshop to co-design rollout steps.
- Ask: 'What one change would make this work better for your team?'
- Effective with: Cross-functional peers, mid-level managers.

These are some tried & true suggestions for influencing others

- Pull first and then push
- The more concrete the vision, the more willing people are to try
- Progress is the #1 motivator. Get early wins (even if in private)
- Speak to the “unmet need”
- Ask SME’s for input and advice to create agency
- Use two magical words: “You’re right”

These are some tried & true suggestions for influencing others

Reciprocity – People feel obliged to return favors and concessions.

Example: When you share a helpful data template with a deal team, they're more open to adopting your reporting request later.

Commitment & Consistency – Once people commit publicly, they want to stay consistent with that stance.

Example: If an SME agrees early to pilot a new workflow, they're far more likely to support the rollout.

Social Proof – People look to others' behavior to decide what's right.

Example: When another BXCI team successfully automates a closing process, others want to follow suit.

These are some tried and true suggestions for influencing others

Liking – We're more influenced by people we like or trust.

Example: A respectful, collaborative tone earns faster buy-in from partners than authority alone.

Authority – Expertise and credibility make ideas more persuasive.

Example: Referencing audit requirements or quoting a senior compliance sponsor strengthens your case.

Scarcity – Opportunities seem more valuable when they're limited.

Example: Highlighting that process changes must be finalized before the SOC 1 audit deadline builds urgency.

You've listened, you've influenced, and you're stuck. Now what?



These are the steps toward resolving challenges

- Name it
- Frame it
- Tame it



Name: The first step is to “name” the impasse

Objective: Get to your “no’s” fast

- Are we at an impasse? What is it? How do I know for certain?
- Do we have a misunderstanding or do we have a shared understanding?
- Am I at my limits?
 - Understanding
 - Influence
 - Authority
 - Resources (e.g., time)

Frame: The next step is to re-frame from an impasse to possibility

- Differentiate the “presenting issue” from the “unmet need”
- Understand your perception and limitations
- Meet your stakeholder where they are



Frame: Help to differentiate the “presenting issue” from the “unmet need”

The way you frame an issue will influence your stakeholder focus

- What is your stakeholder holding on to?
- What is their unmet need?
- How can you speak their language?



Frame: Ask if your perception & limitations might contribute

- How do you feel about difficult conversations?
- How might you be getting in your own way?
- What support do you need?

Frame: Do you understand the case for change and do you “own it”?

The first sale is to yourself

Answer 4 questions:

- What is the problem?
- Who says so and on what evidence?
- What would occur in the business if no one acted to solve this problem?
- What would happen to us if that occurred?



Meet your stakeholder where they are

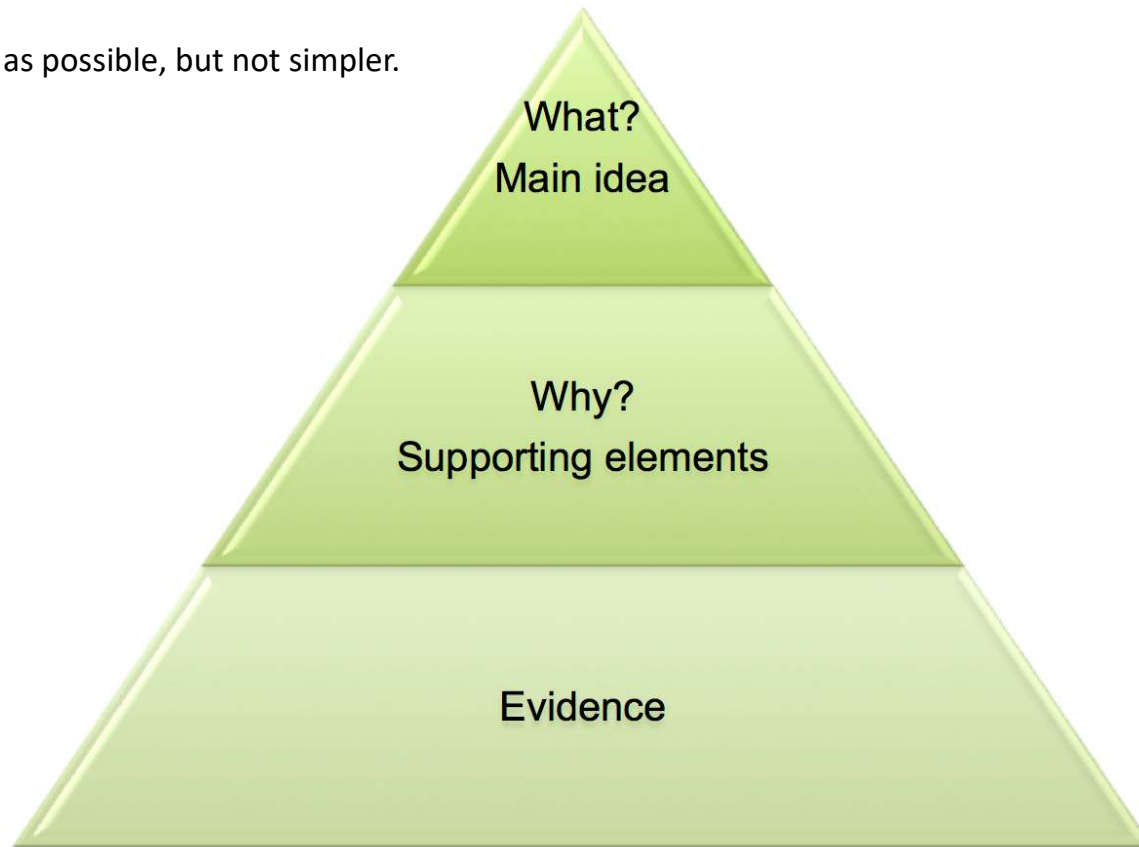
- What is their WIIFM?
- What is their currency?
- Who are their key influencers? Can you influence the influencer?
- How might you move from “me” to “we”?



Use the Minto to meet your stakeholder where they are

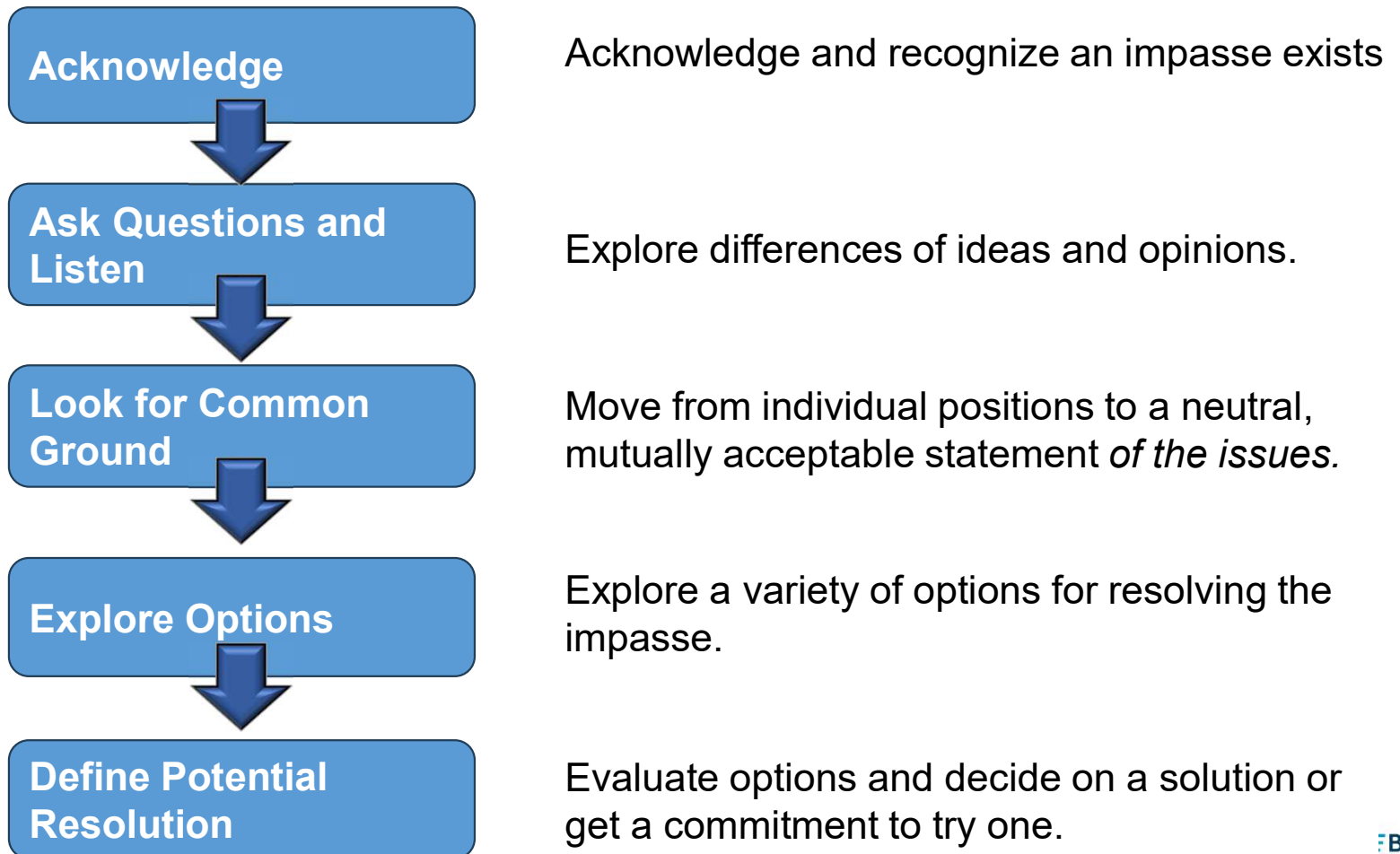
Make everything as simple as possible, but not simpler.

~ Albert Einstein



— Based on Barbara Minto's "Pyramid Principle" —

To move toward resolution, try this conversation flow



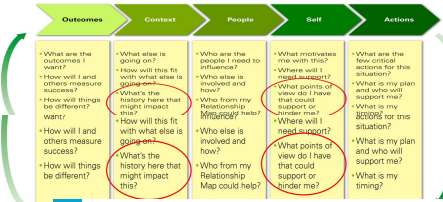
Use the tools in your Influence Tool Kit

This Listening Framework will help you listen deeper

- Suspend your agenda
- Attend to the other person
- Verify what you "heard"
- Verify what you heard



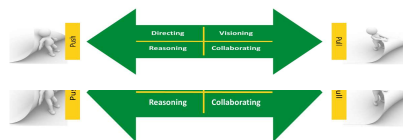
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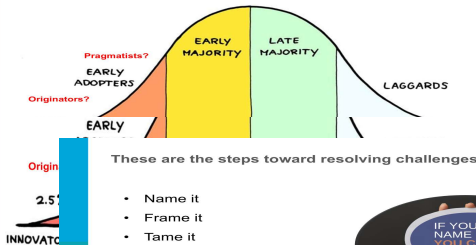
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These are four different approaches you can try



When thinking about your stakeholders, build momentum

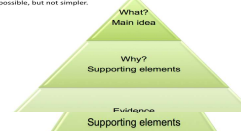


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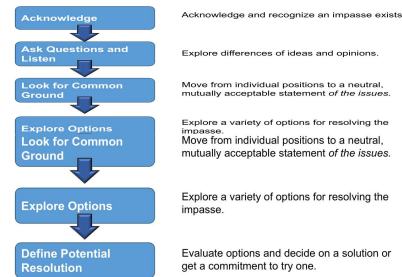


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LEBOFFE & ASSOCIATES

LEBOFFE & ASSOCIATES
elevate yourself, one step at a time

*Thank
you*



paul@leboffe.com

LEBOFFE
& ASSOCIATES
elevate yourself, one step at a time