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## **Virtual Influencing: Persuading Others When You Can't Meet Face to Face**

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For HR, communicating with candidates and employees across a desk used to be the norm. (Remember how much stock was put in a firm handshake?) But today's professionals regularly interact with one another virtually—by email, over the phone, by IM, through social media, via groupware, etc. Companies and HR departments that want to negotiate confidently and communicate well with their workforce must become adept at virtual influencing.

Virtual contact has its shortcomings. Face to face, people communicate using body language, gesture, tone of voice, volume, speed and pauses. We hear each other's words, but we also interpret each other's signals—and can respond to them on the spot. When relating virtually, we're deprived of this valuable input, and influencing can pose a much greater challenge. But it's one challenge, in this day and age, that must be met.

Lee E. Miller, Managing Director of NegotiationsPlus.com, visited TemPositions HR Roundtable Series on Thursday, March 31, 2011 to share his expertise on virtual influencing. A career negotiator and employee relations specialist, he's the author of *Get More Money on Your Next Job...in Any Economy*, *A Woman's Guide to Successful Negotiating* and *UP: Influence, Power and the U Perspective—the Art of Getting What You Want*.

Becoming skilled at virtual influencing is as achievable as it is necessary, Miller assured attendees. But you must make the conscious decision to develop virtual fluency.

The first step is to understand the core principles of influencing. The second is to recognize the strengths and weaknesses of the various virtual tools. And the third is to use those tools selectively and strategically to influence others.

### **The Making of a Master Influencer**

Miller began by sharing the story of his own professional evolution. Once the VP of employee and labor relations for a major US retailer, he's now a university professor, newspaper columnist, author and corporate trainer specializing in the art of influencing. His innate instincts for the skill made the transition possible—and successful.

Miller left his job as VP after an acquisition and was quickly rehired on a consulting basis. When his friends learned that he was available, many of them called on him for free advice on

negotiating. But he couldn't afford to run a free consulting practice. So he headed to the store, hoping to find a good book to recommend.

What he found—or didn't find—surprised him. While there were some books on employment negotiation tactics for corporate executives, there weren't any titles that he felt offered strong negotiation advice for average, mid-level workers.

Miller decided to write a book himself. So he drafted a table of contents and a first chapter, then shopped the book to publishers. He informed them that he saw a need, did not see great competition, that he had the right experience to write the book, and that he would do so with diligence. He soon sold the book and received an advance.

The problem, he joked, was that he had no idea how to write a book. So he sought out a friend—a published author he hoped might give him guidance—and told him he'd sold a book that he'd not yet written. And this published author responded with amazement.

Miller learned that it's extremely rare for an unpublished author to receive an advance on a book. Celebrities and established authors receive such treatment, but first-time authors generally have to finish their books first, and they often spend years selling them.

Miller conceded he had inexperience on his side. If he'd known what standard industry practices were, he probably wouldn't have tried to sell his book at all. But he did sell it—because he dealt with everyone around him fairly and honestly, and he kept their priorities in mind. He influenced his publisher not with bravado, but with sound business sense and the right approach.

The moral of the story, he stressed, is that most professionals don't really understand influencing, especially as it differs from negotiating. When they do, they have a much easier time getting others to do what they want—eagerly—even when it flies in the face of convention.

He asked the group to imagine a negotiation in progress. Most attendees pictured two people in a heated discussion or an otherwise tense exchange. Next, he asked them to imagine an influencing scenario. Attendees painted a much gentler, less confrontational picture. They imagined two people having a pleasant conversation and exchanging ideas.

Negotiating, Miller explained, feels adversarial. The other party perceives you're trying to take something away from them, and their guard is up. Influencing, by contrast, is the art of focusing on the other party's needs—and explaining how your preferred course of action will see those needs met.

“The main difference is that influencing is not about you,” Miller explained. “It's about the other party and how they perceive what you're doing.”

### **The U Perspective**

To become better influencers, Miller encouraged attendees to focus on what he calls “the U Perspective.” The U Perspective acknowledges that professionals have emotions, values that are

extremely important to them, and personal needs. “Organizations have interests,” he said, “but individuals have U Perspectives.”

Everyone you try to influence will already have a point of view. And it’s usually impossible to change it. Miller shared this quote from psychologist Christopher Chabris: “Appeals to emotion are more effective than appeals to logic—not because people are stupid, but because the mind is designed to use logic for supporting our beliefs rather than for changing them.”

Rather than try to talk people out of their beliefs, Miller counseled attendees to embrace the U Perspective. Use the way a person sees a situation to influence their actions.

He offered an example from his daughter’s real estate practice. She took on a very demanding client that didn’t have a lot of money to spend. But miraculously, she found a property that met all her client’s specifications and fell within the desired price range.

His daughter contacted the client with the good news—but got turned down! Apparently, the client had consulted a palm reader who said the business’ success would come in a red building. The available property, perfect though it was, just wasn’t red.

At such a moment, Miller warned, most people would be tempted to argue with their client. They would stress the positives and insist that color wasn’t important. But the U Perspective requires you to accept the other person’s belief system. So instead of trying to get between this client and her palm reader, his daughter simply offered to paint the building red.

“The U Perspective doesn’t require you to convince someone that something they think is bad is good,” he explained. “Instead, what they believe is good is exactly what you’re proposing that they do.”

The U Perspective can be very useful in recruiting. Candidates’ requirements may seem bizarre or even petty, particularly when there’s a perfectly good job on offer. But by thinking about each candidate’s U Perspective, HR can help ensure that star players accept offers.

Instead of judging candidates’ priorities, Miller explained, embrace them. Everyone wants a fair salary. But the U Perspective reminds us that candidates have emotions, values and personal needs. IT specialists flock to companies that invest in the latest, greatest tech toys. Creative directors enjoy unconventional workspaces. If certain amenities or practices can attract the right people and inspire them to work harder, they’re worth the company’s investment.

The U Perspective also informs HR on how to handle bad news. No employee wants to find out that they’re being disciplined—or worse, terminated—via email. Whenever there’s a dispute, workers need the chance to respond, state their case, and share important information that may affect the company’s decision. The wrong virtual contact can send the wrong message...that the company won’t listen.

So choose warmer, more humane methods for interacting with your workforce, Miller advised. Employees who are treated with consideration are more loyal, and they're less likely to sue if the employment relationship ends.

## Understanding Motivation

When thinking about the U Perspective, it's important to understand what truly motivates people. Broadly, most people want money. But they also want power, status, challenges and competition, recognition (or fame), free time, a comfortable lifestyle, friendship, love, etc. The skilled influencer knows that money isn't the only thing that matters—and listens carefully to the other party to find out what they really want.

Miller offered an example from his own professional past. One of his clients, a fast food chain, wanted a specific celebrity to be featured in their advertising campaigns. They offered the star a great deal of money. But no matter how much they offered, he turned them down.

Eventually, Miller learned that the celebrity had grown up poor. His agent said he cherished his newfound image as a wealthy and successful man, and he didn't want to sully this reputation by promoting fast food.

Had Miller found this out earlier, he explained, he would have told his fast food client to stop offering more money and focus on the celebrity's U Perspective. What this man cherished was his status and position. Instead of a fortune in cash, they should have offered to donate proceeds from sales (at least those related to his promotion) to the charity of his choice, or found some other way to do good work in his name.

Of course, not all motivations are altruistic. Greed and desire are extremely powerful too, as evidenced by the success of luxury brands like Gucci, Rolex and Lexus. When consumers buy these products, they're satisfying their need for status—no matter what they say. "This is reality," Miller said, "people buy what they want, not what they need, and they do what they want, not necessarily what they should."

There's another good reason to understand what people want, he went on. A person's desires lead you directly to another extremely powerful motivator: what they fear. Combined with other motivations, fear can be the most powerful influencer of all.

The real estate client who wanted a red building, for example, might have been motivated by learning that others were en route to look at the property. A candidate who is taking too much time to accept an offer may be motivated by hearing that HR will continue to screen new candidates until the position is filled.

It's important to be truthful when using fear as a motivator—inventing a false threat is unkind, and if your deceit is discovered, your relationship may end for good. But introducing competition or warning that "time is running out" may prompt parties to act.

Of course, motivations and the U Perspective are inseparably linked. As JP Morgan once said, "People generally have two reasons for what they do—a good reason and the real reason." When you find their real reason, Miller explained, you've found their U Perspective.

## **The Three C's Method**

With the U Perspective in mind, Miller created an approach to basic influencing called the Three C's Method. Its three components—Convince, Collaborate and Create—can be used in combination or separately. But as a whole, they offer expert instruction on how to conduct the actual influencing process.

When convincing others, Miller stressed, it's critical to consider their U Perspective. This first C is subjective. It's based on emotions. To *be* convinced, they must *feel* convinced—and they will only experience this feeling if you honor what they consider valuable.

Collaborating is the art of making every negotiation a win-win scenario. So this second C is objective. You adjust what you're offering, and the other party weighs the changes you're making to sweeten the deal.

Creating, within this context, consists of structuring the conversation to give yourself the advantage. With this third C, you'll again be operating subjectively, stirring motivations. It's in this mode that you might introduce the threat of competition. Or, Miller joked, you might send someone else to make your presentation, if you've concluded the other party doesn't like you.

The Three C's Method works whether it's deployed in person or virtually. So if you start to feel lost in a negotiation, think of the Three C's to reorient yourself. Determine where you are, and remember whether you're in a subjective or objective moment in your negotiations.

## **The Power of Legitimacy**

Once you've come to understand the U Perspective, peoples' true motivations, and how to convince, collaborate and create a positive negotiation, you're well on your way to influencing anyone to do anything. But as Miller pointed out, you must operate from a position of expertise. The other party must perceive you as 100% legitimate.

Legitimacy makes influencing accumulate to action. Broadly, the other party must want what you're offering (assuming you've embraced their U Perspective, they will). They must trust you and believe you can deliver. They must believe that the time is right so they won't procrastinate. And they must understand how the process will proceed and believe that it will be easy. When they see you as legitimate, it's much easier to usher them through these perceptions.

Miller offered an example from the world of entertainment. In the movie "Catch Me If You Can," actor Leonardo DiCaprio plays a con man who convinces everyone around him to do whatever he wants. He presents himself confidently, and this helps him succeed. But most importantly, he impersonates respected authority figures: a doctor, a pilot, a lawyer, etc. As Miller pointed out, such figures are rarely questioned.

"In real life," he said, "we have all learned that when you directly challenge someone in authority, you either get fired or embarrassed. So we don't challenge experts, and there's a lot of power in becoming a figure with authority."

You must create legitimacy for oneself, step by step. And as Miller explained, it's a straightforward process. All you need is a strong aura of authority, a respectable title, real credentials, expertise, a professional appearance and a good network. Once you have these things, all you need do is announce yourself to your industry to be regarded with respect.

### **Building Virtual Legitimacy**

Of course, face-to-face legitimacy doesn't translate automatically to virtual legitimacy. How do you make sure that a contact who's meeting you via virtual channels will accept your expertise, respect your authority and view you with the legitimacy you'll need to successfully influence them?

Miller recommended starting with a solid web site. It should look polished and professional. It should include both your credentials and testimonials that lend depth to the promises you make about your company and/or its services. If you're trying to attract new employees, include a page or two on joining the company, and make it easy for candidates to apply for open positions.

People who are in business for themselves especially need a good site that's easy to find. In his own practice, Miller rarely gets business from his web site—but he knows that people who meet him will visit it to investigate him further. Everyone should expect to be “Googled.” And if no one can find you online, you'll rarely be seen as legitimate.

Avoid relying too heavily on social media pages purportedly geared toward businesses and causes, he warned. Facebook offers such pages, and you may be able to drive visitors there. But from these pages, they can easily wander off into other areas of Facebook that have nothing to do with you or your business. They may even discover a business they like better than yours.

Embrace social networking only if you're willing to spend the considerable time it takes to develop a community. Twitter feeds and business-related Facebook pages need to offer constantly-updating content and opportunities for exchange. If you can offer something of value to your constituencies this way, Miller said, do so. But if you know you can't or won't, use more traditional methods to build your virtual legitimacy.

### **Virtual Influencing**

Once you've established your virtual legitimacy and learned to use the U Perspective in the face-to-face world, you can readily transfer those skills into the virtual one. But virtual influencing must be handled more strategically. You can and should stay sincere, but you'll need to be a little calculating.

Choose your communication method carefully. A fax sends a different message than an email. An informal instant message will be perceived very differently than a phone call. A comment posted on someone's professional blog will be viewed differently than a note on their Facebook wall. And a printed letter lends on-the-record formality to any communication.

Don't forget, Miller noted, that virtual communications deprive you of important sights and sounds. You won't be able to read your contact's body language when they read your email, and even a phone call can feel awkward in ways a live chat wouldn't. The answer isn't to lament the weaknesses of each virtual channel, but to stay even more tightly focused on the U Perspective.

If you can't develop a relationship in person, you'll have to choose the right tools to do it virtually. And this process will require you to add personal touches and treat virtual communications with less formality than you may be accustomed.

Think about it, Miller told attendees. When you meet someone in person and chat over lunch, getting to know them comes naturally. It feels normal to ask about their family or allow the conversation to wander. Virtually, you'll need to feel comfortable building this rapport with a little bit more intent. You will have to do it consciously.

Go ahead and ask questions, he advised. Ask the other party about their weekend and if they have children. And share things from your own life—send family photos or forward articles about personal hobbies that you both enjoy. Take any chance you can to meet in person, cementing the relationship you've begun to develop virtually.

Many attendees were curious about how to use Facebook as a relationship-builder. As Miller explained, there's no bright-line test for knowing when to "friend" a business contact. It's simply best to stay genuine, wherever you fall on the digital spectrum. There's no need to share extensive personal information online. But Miller recommended sharing occasional personal observations or details to lend Facebook contact more authenticity.

Staying curious about the other party will help you avoid what Miller called "me-facing" virtual communications. When a channel limits the contact between parties, the temptation will always be to focus on your own needs...and forget the U Perspective.

Miller offered web sites that make it hard (or impossible) to find a contact number as cautionary tales. Why would a company make it hard for customers to reach them? Because web sites overwhelmingly focus on the company, not the experience of the web visitor. And so developers, Chief Financial Officers and others focus on making sites cheaper and easier for the company to maintain—not better for customers.

Miller urged attendees to learn from such mistakes. Think of all your virtual contacts as people, he advised, and do everything you can to meet their preferences.

If you're working with someone in a different time zone, communicate virtually on their schedule, not yours. If you sense a hint of frustration in an email, respond with a phone call—it's more personal and attentive. And absolutely never send a frustrated email yourself.

Because there are so many ways to communicate virtually, the temptation will always be to choose the ones that are most comfortable or convenient for you. But the art of influencing in the virtual realm requires you to consider the U Perspective in every facet of your communications.

One colleague may prefer emails and phone calls, but no letters. Another may love instant messages and an occasional video conference. Some will consider handwritten notes charming, while others will believe that professional correspondence should always be typed.

Ask yourself how the other party would like to be contacted—based on their personality, your message or the circumstances—and act accordingly.

### **Virtual Overload**

The greatest threat to successful virtual influencing, Miller warned, may be virtual overload. We all receive far too many emails and phone calls, every day. But once again, the U Perspective holds the answer. What does your contact want? Less content.

Embrace the power of brevity and clarity, Miller instructed. Length does not equal substance; after all, the Gettysburg Address is only 272 words long. The Bill of Rights is 482 words. The Declaration of Independence is 1,482 words. These are some of the most influential documents in history, yet they're wonderfully concise.

Acknowledge the other party's virtual overload by keeping your correspondence brief. They'll appreciate your thoughtfulness—and give more thought to your message.

### **Perception is Reality**

Ultimately, our goal as influencers is to get people to do what we want, Miller said in closing. And this goal remains the same whether we're meeting in person, talking on the phone, exchanging emails or firing off instant messages.

When you feel overwhelmed by the challenge of virtual influencing, remember that the core tenets of influencing remain the same. Review the Three C's Method. Consider motivations. And embrace the U Perspective. Remember that what matters most is not what's happening, but the way your virtual conversation partner perceives it.

Each method in the virtual toolbox comes with its own strengths. Each has a distinct flavor and will be effective under different circumstances. So develop your expertise and find your virtual stride, Miller advised. You'll become one of the most persuasive people you know.

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