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Learning How to Influence Others: A Training Module and Experiential Exercise

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ABSTRACT
Effective leaders in the 21st century must be able to elicit desired changes through one-on-one dialogues, in small groups, and through speeches as well as other communication channels directed at broader audiences. Unfortunately, knowledge about influence tactics does not necessarily translate into effective usage. Therefore, we developed a training module and experiential exercise that provide participants, as influence agents, practice using 11 proactive influence tactics. The module also provides participants, as targets, practice in identifying uses of the tactics in various real-life situations. The authors developed training materials and instructions to help participants gain a deeper understanding of the influence process. Materials provided for instructors include an interactive student handout, a two-part homework assignment including a solutions key, a list of sample scenarios, and a list of tactics to be used in the exercise.

KEYWORDS
Dyad; experiential exercise; influence; influence tactics; persuasion

The ability to influence others has always been an important skill of effective managers and leaders (Fernandez, Simo, Enach, & Sallan, 2012; Yukl & Chavez, 2002). This skill set is becoming an even more critical leadership skill in 21st-century organizations—especially when the leader has little or no formal authority and in organizations that have moved away from hierarchical forms of structure toward more empowering forms (e.g., self-managed and cross-functional teams). The ability to influence others gains importance as globalization and cultural understanding become common ground for leaders across the world. Leaders, as agents, need support and commitment from employees if they are to effect the necessary adaptations to rapid changes demanded in today's business community (Charbonneau, 2004). Specifically, Yukl (2012) and Moideenkutty and Schmidt (2011) recognize the ability to influence as one of the major behaviors that an effective leader must master in order to create positive changes in an organization. At a micro level, influence is present in our everyday lives: Professors attempt to influence students; children attempt to influence parents; work colleagues try to influence each other. Learning how to effectively use the influence process can, therefore, be a beneficial skill that can prepare business school graduates in their on-the-job effectiveness following graduation (Burke-Smalley & Wheatley, 2015; Reitman & Schneer, 2008).

Collectively, we have taught influence tactics at the undergraduate and graduate levels in both leadership and organizational behavior courses for many years. Students often find the topics of power and influence intoxicating; even more so, such pupils are intrigued at the process of exercising power through the use of specific influence tactics. However, gaining knowledge and insight on influence tactics is easier said than done. Students claim to understand the tactics when they are defined in the textbook and during classroom discussion but repeatedly have had difficulty effectively applying that knowledge in exams, journal entries, and reflection papers. In our opinion, classroom discussion and assigned reading on influence tactics are necessary, but not sufficient, conditions for effectively learning these processes. The ability to apply one's knowledge about influence tactics successfully requires practice. Likewise, scholars have recognized that there is a lack of soft skill development in the millennial generation of college students (Gibson & Sodeman, 2014). This "hole" in the higher education system provides an opportunity for further student learning.

In an effort to help students gain a deeper understanding of the influence process, we recommend utilizing the experiential learning approach to provide students the opportunity to learn, practice, and reflect. To that end, we developed a training module that includes an experiential exercise designed specifically to foster such understanding. The entire module can be completed in two or three class sessions, depending on the length of the class. We specifically focus on the 11 proactive influence tactics identified

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and validated in the extended Influence Behavior Questionnaire (Yukl, Chavez, & Seifert, 2005; Yukl, Seifert, & Chavez, 2008). These tactics are rational persuasion for the organization (RPO), apprising (APR), inspirational appeals (INSP), collaboration (CLB), exchange (EXC), legitimating (LGT), pressure (PRES), consultation (CONS), ingratiating (IGT), personal appeals (PERS), and coalition (COAL). Definitions for these 11 influence tactics can be found in Yukl, Seifert, and Chavez (2008, p. 610). The acronyms here are utilized throughout the module and exercise.

We took a five-step approach to building this module that allows learners of all types the opportunity to be successful. First, we include a brief summary of the experiential learning approach and our rationalization for choosing this methodology for our training module. Second, a literature review of research on influence and, specifically, the 11 proactive tactics provides the necessary foundation of knowledge of previous empirical research that instructors need in order to successfully apply the module and exercise. We also offer instructors the tools for leading a rich discussion on influence tactics by creating an interactive handout where students identify the general outcome associated with each tactic and create detailed examples throughout the classroom discussion (see Appendix A). Third, an overview of the training module and experiential exercise introduces readers to all the activities encompassed within the module. Fourth, detailed training notes are provided for instructors to successfully apply the training module and experiential exercise into their classrooms. Instructions for Part I of the individual homework assignment and solution are included for instructors in appendices B and C. An experiential exercise actively allows all students to participate in both agent and target roles in the influence process. Scenarios and influence tactics are provided in appendices D and E. Part II of the individual homework assignment is included in Appendix F. Students are asked to read a short vignette and create a narrative that finishes the story while demonstrating effective usage of influence tactics within the storyline. Finally, we conclude with a discussion on the training module and a conversation on limitations and future research.

Step one: Defining experiential learning and evidence based approaches

Life is a journey, full of experiences that allow individuals the chance to reflect and learn from each of these episodes. The experiential learning approach outlined by Kolb (1984) suggests that individual learning occurs through a cyclical process of continuous experience, reflection, challenging existing assumptions, and testing new assumptions. Individuals progress through four stages of learning: concrete experience, reflective observation, abstract conceptualization, and active experimentation. Our training module gives students the opportunity to progress through this learning approach.

The connection to the experiential learning approach and training on influence tactics is quite strong. Our experience teaching this subject has led us to embrace this methodology in particular because students were not retaining knowledge on influence tactics through class discussion and readings alone. The training module's student learning outcomes follow the experiential learning approach to ground this module in sound learning theory. We take an evidence-based approach (Rousseau, 2006) to the training module with an extensive literature review, basing our discussion on foundational research as well as hot-off-the-press scholarly work on the art of persuasion. Students will experience influence attempts, reflect on the experience, make connections about the subtle differences between tactics, test their own assumptions regarding influence behavior, and, finally, build the skills necessary for effectively influencing others. The following sections review the literature on influence in general and then focus on specific influence tactics.

Step two: Reviewing influence research to create knowledge base

Why is learning how to influence important?

Influence tactics are specific behaviors that bridge the gap between power bases (French & Raven, 1959) and actual behavior change. Yukl (2006) recognizes influence tactics as the specific behaviors employed by one individual (the agent) in an attempt to change the behaviors or attitudes of another individual (the target). Specifically, agents are those who initiate the influence tactics, while targets are those individuals who are the recipients of the influence attempt. Yukl, Guinan, and Sottolano (1995) note several reasons why an agent would want to influence a target individual. First, the agent might allocate work to the target by asking for a task to be completed or assigning a new project. Second, the agent might want the target to change a specific behavior (e.g., to complete a task in a more efficient manner). Third, an agent might seek the target's help or assistance on a project. Fourth, the agent might need the target's support or approval on a new project or with launching a new program. Finally, the agent may be seeking a personal benefit from the target. This gain might include changing work conditions, negotiating a pay raise, or changing work hours to accommodate family obligations.

Types of influence tactics

Management and psychology literature identifies four major types of influence tactics. Impression management tactics are used to create a persona that presents a positive image of an individual (Yukl & Chavez, 2002; Yukl, Lepsinger, & Lucia, 1992; Yukl et al., 2008). These tactics focus on creating an ethical and trustworthy image of the individual or group. Political tactics promote an individual's personal agenda and can be either positive or negative. Some scholars recognize this type of behavior as functional or dysfunctional (Fairholm, 2009; Mayes & Allen, 1977; Valle & Perrewe, 2000). Reactive tactics are used when a conflict or event has already occurred. These tactics are used to ward off influence attempts. Finally, proactive influence tactics are methods used that aid in the process of persuading an individual to carry out a specific task that she or he would not normally perform (Yukl, 2002; Yukl & Chavez, 2002). Such proactive tactics are used before a conflict has occurred. This training module and experiential exercise focus on correctly using proactive influence tactics.

Outcomes and directions of influence attempts

Yukl and Chavez (2002) suggest there are three possible outcomes of an influence attempt: resistance, compliance, or commitment. Resistance occurs when the target chooses not to do what the agent asks and may, in some instances, even resort to sabotaging the request. Compliance occurs when the target fulfills the agent's request but is neither enthusiastic nor apathetic about such effort. Commitment occurs when the target not only performs the requested activity but also buys into the purpose of the request.

Influence attempts can occur in three separate directions: downward, lateral, and upward. A downward influence attempt occurs when the agent attempts to influence a target who holds a lower organizational rank (e.g., an employee who reports directly to the agent). A lateral influence attempt occurs when the agent tries to influence someone with the same organizational rank (e.g., a peer). An upward influence attempt occurs when the agent attempts to influence a superior. Yukl and Tracey (1992) investigated the outcomes of using influence tactics in all three directions. Some tactics were used more frequently than others, depending on the specific direction of the influence attempt. Yukl et al. (1995) also note that the reason behind the influence attempt tends to change with the direction of the influence attempt. Outcomes of specific influence tactics are discussed in detail in the following section.

Proactive influence tactics

Many studies on interorganizational influence were conducted in the late 1970s and 1980s (Case, Dosier, Murkison, & Keys, 1988; Cheng, 1983; Erez, Rim, & Keider, 1986; Harper & Hirokawa, 1988; Herold, 1977; Mowday, 1978; Schilit & Locke, 1982). As research on organizational influence tactics gained in popularity, Kipnis, Schmidt, and Wilkinson (1980) and Kipnis and Schmidt (1982) created the Profile of Organizational Influence Strategies (POIS) as a measure for assessing influence behavior in organizations. This measure provided the foundation for subsequent influence tactic research. The POIS was later scrutinized by many researchers such as Yukl and Tracey (1992) and Schriesheim and Hinkin (1990), who suggest that major improvements should be made to modify the measure. Yukl and colleagues developed the Influence Behavior Questionnaire using tactics identified by Kipnis et al. (1980) and Kipnis and Schmidt (1982) while empirically adding other tactics. The result of this work yielded the 11 empirically distinct influence tactic constructs (see Yukl et al., 2008, pp. 618–620).

The preceding literature review demonstrates the development of influence tactic research in the management literature. Throughout this period of time, scholars have attempted to identify and hone specific behaviors that lead to desired outcomes such as compliance or commitment. What is particularly interesting about this body of research is how minute changes in construct definition of an influence tactic can drastically change the outcome of an influence attempt. It took the collective effort of many scholars several years and numerous empirical tests to determine these small nuisances. Our experience in teaching both undergraduate and graduate students showed us that students thoroughly enjoyed learning about power and influence tactics, yet they struggled to attain a deep understanding of the differences between the tactics and therefore had difficulty successfully demonstrating influence tactic usage on quizzes/exams and journal entries. If it took management scholars such a long time to accurately identify influence behaviors, it is easy to see how students may also have difficulty understanding the nuts and bolts of what makes each influence tactic different. We developed this training module to help students explore influence tactics and develop the skills necessary to effectively apply such approaches.

The following discussion explores each tactic in detail. An example for correctly using each tactic is provided, along with the corresponding homework questions. We have also created and provided a scale—identified as a "potential for commitment" scale. This scale ranges in value from 1 to 10. At one end of the scale, the value of 1 equates to the likelihood of target resistance to the influence attempt, while the value of 10 equates to the likelihood of the highest level of commitment. The number identified on the potential-for-commitment scale was determined by previously published research; however, recall that research on human behavior does not provide us with a definitive black-or-white answer for every situation. There are differences across subgroups (different cultures, genders, ages, etc.) that therefore prevent the absolute certainty of this number in every situation. This variance is the reason why we call it the potential for commitment. There are two assumptions associated with the potential for commitment scale number. The first assumption is that the agent correctly used the tactic in the influence attempt. Second, agents and targets are from the United States, unless otherwise stated.

Rational persuasion for the organization (RPO)

Rational persuasion uses facts and logical evidence to show that a request is reasonable and necessary in order to achieve organizational goals and objectives. This tactic places an emphasis on organizational efficiency, increased profits, and employee productivity. Rational persuasion employs explanations of how the request will benefit the organization as a whole. According to the writings of Yukl and Tracey, this tactic "can be used for influence attempts in any direction. Nevertheless, rational persuasion is likely to be used more in an upward direction than in other directions, because in an upward direction a manager is limited by a weaker power base and role expectations that discourage the use of some tactics" (Yukl & Tracey, 1992, p. 527). It is important that the agent understand the intrinsic motivation of the target because rational persuasion emphasizes organizational benefit(s) from the completion of the task. More recent studies on rational persuasion found that it was a very "flexible" tactic in that it can be effective in influencing subordinates, peers, and superiors (Yukl et al., 2005). Rational persuasion has been investigated in a handful of influence tactic studies that examined cultural differences with influence tactics. American managers perceived this tactic to be more effective when compared to Chinese managers (Fu & Yukl, 2000). American managers show preference for tactics that involve directly confronting an issue, such as rational persuasion, while Chinese managers prefer a more indirect approach. In a more recent study, Yukl, Fu, and McDonald (2003) found that American and Swiss managers perceived rational persuasion to be more effective when initiating a change within the organization than when compared to the perceptions of Chinese managers. Qiaden, Tziner, and Waismel-Manor (2011) compared Jewish and Arabian employees and found that Jewish employees perceived rational persuasion as an effective tactic to use while the Arabian employees did not.

Example. "Our firm should upgrade to the newest version of the financial software because a recent study by *Harvard Business Review* found that companies that complete the upgrade increase efficiency by 47%."

Potential-for-commitment scale. 8 out of 10. An early study by Falbe and Yukl (1992) found only intermediate effectiveness for rational persuasion. Later work by Yukl et al. (Yukl, Kim, & Chavez, 1999) suggests that there are empirical differences between weak and strong forms of rational persuasion. Yukl et al. (2005) and Yukl et al. (2008) found that rational persuasion was an effective tactic to gain commitment.

Corresponding homework questions. 5, 19, 47, 55.

Apprising (APR)

This tactic uses facts and logical evidence to demonstrate that a request will benefit the target personally. When using this tactic, the agent should emphasize how the proposed request will do the following for targets: make their jobs easier, help their careers, or help them attain something they want (e.g., a promotion, pay raise, etc.). Originally thought to be part of rational persuasion, apprising was later validated as an empirically distinct construct (Yukl et al., 2005). Extrinsic target motivation plays a large role when using this tactic because the agent is emphasizing personal gains targets could achieve if they complete the request. Yukl et al. (2005, p. 710) notes, "The use of apprising is more likely to be successful if the agent understands the target's personal needs and how a request or proposal may be relevant in satisfying them."

Example. "Sarah, you should consider learning and becoming proficient in the new financial software the company just installed. A recent article in *Harvard Business Review* suggests that individuals who are proficient with this software are 28% more likely to receive promotions within 6 months."

Potential-for-commitment scale. 5 out of 10. Yukl et al. (2005) found that this tactic tends to gain target compliance.

Corresponding homework questions. 13, 24, 29, 38, 46, 52.

WARNING TO INSTRUCTORS! Students often have trouble distinguishing between rational persuasion and apprising. The similarities and differences are discussed next:

Early research on these two tactics did not distinguish between rational persuasion and apprising (Yukl et al., 2005). Both tactics employ facts and logical evidence to present reasons why a request should take place. For both, an agent must understand what motivates the target, while the target must perceive the agent as a credible source. Rational persuasion emphasizes a benefit higher than oneself. For this tactic to be effective, the target must be intrinsically motivated. On the other hand, apprising emphasizes individual benefits to the target such as promotion opportunities or quarterly bonuses. Individual benefits tend to be tangible in nature, suggesting that the target is externally motivated. Rational persuasion is a more flexible tactic that is effective in many situations; however, apprising has more limitations. Both tactics generally result in different outcomes. If used correctly, rational persuasion tends to result in target commitment, while apprising results in compliance (Yukl & Chavez, 2002; Yukl et al., 2005).

Exchange (EXC)

When using this tactic, the agent offers to do or give something to the targets in return if they agree to carry out the request. This approach can include the agent's offering targets a reward or promising something in the future if they will complete the task. Exchange is the principle behind compensation systems: You work for company XYZ, and XYZ will provide you with a paycheck in return. Yukl and Tracey (1992) recognize that exchange is most effective in lateral or downward attempts because subordinates rarely have organizational resources not available to an individual holding a higher organizational rank. Scholars recognize that it can be difficult to offer an incentive large enough to generate commitment and enthusiasm when using this tactic (Yukl et al., 2005). Falbe and Yukl (1992, p. 642) contend that "An exchange of tangible benefits between a leader and a subordinate is an impersonal transaction that often results in subordinate commitment to the task." American managers found this tactic to be more effective than their Chinese counterparts (Fu & Yukl, 2000).

Example. "I will let you leave work early on Friday afternoon if you finish the financial report for me by lunch today."

Potential-for-commitment scale. 5 out of 10. Yukl and Falbe (1990), Falbe and Yukl (1992), and Yukl et al. (2005) found that targets of this tactic generally comply but are not necessarily committed to the task goal.

Corresponding homework questions. 3, 9, 23, 30, 45, 56.

Collaboration (COLB)

When using collaboration, the agent offers to do something for the target that will help that person complete the request. The agent can offer to help the target carry out the request by demonstrating how the task needs to be completed, by providing the necessary materials or resources the target would need to complete the task, or by even offering time or a reduction in responsibilities in order to complete the request. The agent can also offer to share the rewards if the target chooses to help with the task. Targets often buy in to this influence tactic because they feel that the agent is supporting them throughout the task duration. This perception can generate enthusiasm and task commitment. Yukl et al. (2003) found that collaboration is an effective influence tactic when used with American managers.

Example. "Harold, I will give you access to the financial software and all the data if you will complete the financial report for me by lunchtime today."

Potential-for-commitment scale. 8 out of 10. This tactic often results in commitment from the target (Yukl et al., 2005).

Corresponding homework questions. 16, 33, 41, 50, 57, 65, 67.

WARNING TO INSTRUCTORS! Students often have trouble distinguishing between exchange and collaboration. Here are the similarities and differences between the two tactics:

Early research did not empirically distinguish between exchange and collaboration. The tactics are similar because both involve an offer to do something that benefits the target. The difference between them lies in exactly what the agent is offering to the target. With exchange, the agent offers something that is unrelated to the task. On the other hand, with collaboration, the agent offers something that will directly help the target to complete the task. The outcomes of exchange and collaboration differ as well. When used correctly, exchange generally results in target compliance, while collaboration generally results in target commitment.

Consultation (CONS)

When using consultation, the agent asks the target to make suggestions or give input regarding a proposed task. The agent can ask the target to voice any concerns about the task or asks for the target's help in planning a proposed task. Consultation includes incorporating the target's input into the proposed task. This tactic can also be used when the agent recognizes a potential problem in a proposed task and asks the target for that person's opinion on how to change it. Consultation is most appropriate for situations where an agent has the ability and/or authority to complete a task but needs the support or help of the target to carry it out (Yukl & Tracey, 1992). The agent must be willing to incorporate the target's suggestions for change or improvement. Falbe and Yukl (1992, p. 641) note, "Consultation increases commitment when the target develops a more favorable attitude than was present formerly about the task and feels a sense of ownership for it as a result of participating in planning it."

Example. "Top management would like to reduce the production lead time for our newest t-shirt clothing line. As the operations manager, I could really use your input and suggestions for making a more efficient production process. Will you help me?"

Potential-for-commitment scale. 7 out of 10. Falbe and Yukl (1992) and Yukl et al. (2008) found this tactic often results in commitment from the target.

Corresponding homework questions. 7, 20, 32, 42, 54, 63.

Inspirational appeals (INSP)

When using inspirational appeals, the agent often uses language that generates enthusiasm for a proposed change by dipping into the target's ideals. This tactic is used to create a vision of the successful possibilities for the proposed change. Yukl and Tracey (1992) suggest that inspirational appeals is an effective tactic when an agent is proposing something new and needs the commitment of the target. In organizations, this tactic is often used to create excitement for gaining market share, developing innovative solutions, or becoming pioneers in the industry. In a cross-cultural investigation of influence tactic effectiveness, Yukl et al. (2003) found inspirational appeals to be effective when used with American and Swiss managers but less effective when used with Hong Kong and Chinese managers.

Example. "Products from XYZ Company are making a positive impact on humanitarian projects in developing countries. When you purchase a pair of XYZ shoes, we will donate a pair of shoes to a person in need. Would you like to feel good about your purchase and help those who are less fortunate?"

Potential-for-commitment scale. 10 out of 10. This tactic has the potential to result in the highest level of commitment when used with American and Swiss managers because it appeals to the target's value and moral system (Yukl et al., 2003). Although the potential for commitment is extremely high, note that this tactic is not appropriate in many situations in the workplace.

Corresponding homework questions. 2, 6, 15, 27, 35, 49, 68.

Ingratiation (INGT)

An agent utilizing the ingratiation tactic uses praise and flattery as a method of "buttering up" the target before making a request. The agent praises the target's performance on past projects or expresses confidence in this person's abilities to carry out the request. Higgins and Judge (2004) found that use of ingratiation was impactful on recruiter hiring recommendations. Because this tactic employs the usage of compliments and flattery, Yukl and Tracey (1992) contend that this tactic will be more effective in downward influence attempts and where the agent is someone the target holds in high regard. In particular, this tactic has outcome differences in regard to agent/target gender (Falbe & Yukl, 1992); however, more research is necessary to better determine the implications of male-to-male, male-to-female, female-to-male, and female-to-female influence attempts.

Example. "You are the most creative and efficient employee in the department. I could really use your 'brain power' in planning the new project. Would you be willing help me?"

Potential-for-commitment scale. There are gender differences in terms of effectiveness of this tactic, but Falbe and Yukl (1992) found that this tactic is useful in gaining compliance (5 out of 10).

Corresponding homework questions. 4, 11, 25, 34, 40, 51, 59.

Personal appeals (PERS)

Agents use this tactic when they appeal to the target's friendship as a means for getting something they, as agents, want. The agent asks the target to help as a personal favor, mentioning that such support would really help the requesting agent to get out of this difficult position. Yukl and Tracey (1992, p. 528) recognize that "this tactic appears to be most appropriate for influence attempts with peers, because managers often need to ask for favors from peers but lack the authority to ensure compliance with a formal request." In a cross-cultural study, Yukl et al. (2003) found such an effort to be a useful tactic when attempting to influence Chinese managers because of the approach's focus and emphasis on relationships.

Example. "We have been friends since you first started working here. As a favor to me, could you help me plan the new financial project?"

Potential-for-commitment scale. 5 out of 10. Early studies on the effectiveness of personal appeals yielded nonsignificant results. However, it was later found to be effective in gaining target compliance.

Corresponding homework questions. 14, 22, 39, 58, 66.

Legitimating (LEG)

An agent using this tactic relies on tradition and past precedence to justify a request. The agent often refers to documents that support the argument such as an organizational policy manual or memo from top management. The agent can also mention the names of experts who support this method when making a request. This tactic is useful in lateral influence attempts where the requested task may be unorthodox but necessary (Yukl & Tracey, 1992). Agents must establish their authority in making such a request. Agents can gain compliance for a request if the target perceives that the agent is asking something within that agent's range of authority, organizational policies, or previous procedural precedent.

Example. "Our firm has always processed purchase orders this way. It is important to continue the precedent of this procedure. Even the creators of the technology package SAP would agree with the way our company handles orders."

Potential-for-commitment scale. 2 out of 10. Few studies have investigated this tactic and its relationship with task commitment, but those that have did not find a significant relationship with task commitment (Keys, Case, Miller, Curran, & Jones, 1987; Mowday, 1978; Schilit & Locke, 1982). One study found a negative correlation between task commitment and lateral influence attempts (Yukl & Tracey, 1992).

Corresponding homework questions. 12, 31, 43, 53, 61.

Coalition (COAL)

An agent using this tactic uses other individuals to help persuade the target to carry out the request. This tactic is most useful in lateral influence attempts because a peer is trying to demonstrate why a change is necessary by showing others who are in agreement with the task. Coalition is less likely to be utilized in downward influence attempts because managers would not lack the role authority to make a request. The literature also notes that this tactic is often used when a previous influence attempt has failed, and it is used in a follow-up influence attempt (Yukl & Tracey, 1992). The agent can bring a work colleague along to help show the target that others in the organization also support the request. The agent can mention the names of other individuals in the organization who support the request. The agent can also suggest that the target speak with others who endorse the proposal or ask that the target speak with others who are on board with the request. Multiple methodologies used for testing the effectiveness of coalition resulted in conflicting results when used with American managers. However, this result may be explained when examining this tactic with a cross-cultural lens. Interestingly, coalition was found to be an effective tactic when used with Chinese and Swiss managers (Fu & Yukl, 2000; Yukl et al., 2003).

Example. "I have asked our mutual teammate and colleague, Jerry, to come talk to you about the new project with Microsoft. Before you make up your mind on whether you are going to help, please hear what he has to say."

Potential-for-commitment scale. This tactic was perceived as more effective by Chinese and Swiss managers (5–6 out of 10), while their American counterparts perceived this tactic as less effective (3 out of 10) (Yukl et al., 2003).

Corresponding homework questions. 10, 18, 37, 64.

Pressure (PRES)

An agent uses pressure when that agent threatens or demands that the target carry out the request. This tactic is most often used in downward influence attempts and also as a follow-up tactic to a failed influence attempt (Yukl & Tracey, 1992). The agent often resorts to micromanagement of the target by frequently checking whether the request has been completed. The agent frequently warns the target of the consequences if the task is not finished. This tactic is the most likely to lead to resistance of the target. Managers in Kipnis and Schmidt's (1988) study were found to have a direct linkage between the use of pressure as an influence strategy and low performance reviews. Multiple forms of pressure tactics such as threats, micromanagement, arguing, or challenging authority were also deemed ineffective methods for gaining target commitment.

Example. "Have you finished the financial report yet? I'm going to fire you if you don't have it on my desk by the end of the day!"

Potential-for-commitment scale. 1 out of 10. Falbe and Yukl (1992) and Yukl et al. (2008) recognize pressure as the least effective influence tactic.

Corresponding homework questions. 1, 8, 17, 21, 26, 28, 36, 44, 48, 60, 62.

WARNING TO INSTRUCTORS! Students often have trouble distinguishing between certain aspects of legitimating, coalition, and pressure. Here are the similarities and differences between the tactics:

Students often become confused in terms of one aspect of legitimating and the coalition tactic. As defined, an agent uses the coalition tactic when that agent enlists the aid of other individuals in the organization to help convince the target to carry out the request. However, the key phrase is *individuals in the organization*. Agents are using the coalition tactic if they ask people whom the target knows to help convince that target to agree to the proposal. The agent is using the legitimating tactic if she or he mentions the names of experts in the field who endorse the proposal. In most cases, experts are not individuals whom the agent knows personally. Students often become confused in terms of an aspect of coalition and the pressure tactic. An agent is using the coalition tactic when enlisting the aid of others in the organization who have the same rank in the organization. For coalition to be successful, it must involve an individual who does not have the ability to impact the target's job or implement negative consequences if the target does not carry out the request. If the agent appeals to the target's boss or another individual with higher organizational rank, the request will be perceived as the pressure tactic by the target.

Step 3: Overview of training module and exercise

This training module is useful for both organizational behavior and/or leadership courses. We have utilized this approach for both undergraduate and graduate students; additionally, there are options outlined in the appendices that provide higher level cognitive activities and assigned readings for graduate students. Instructors wishing to use this module need a basic understanding of influence and human behavior, but they do not need to have any specialized knowledge on this content area. The previous literature review provides all the information an instructor would need to successfully run this training module. While a working knowledge of the experiential learning methodology is helpful, instructors need only to be capable of effective classroom management techniques.

Instructors interested in gathering assessment and assurance of learning data should begin with a pretest. This is an optional step; however, we have compiled measures of general self-efficacy from Sherer et al. (1982), adapted items from Bandura's (2006) process for developing task-specific self-efficacy measures to reflect influence tactic usage, and created scenario-based application exam questions. These assessment materials can be obtained by e-mailing the first author. After the pretest, the training module starts before students have read any assigned chapters or articles on power or influence. The previous literature review provides a concise foundation for instructors to understand the intricate differences between influence tactics. Specifically, the literature review provides a brief background on each tactic, gives an example, provides a potential number correlated with effectiveness in terms of level of commitment, and identifies the corresponding homework questions. The instructor passes out copies of the Influence Tactics Classroom Discussion Handout (Appendix A). The handout provides a guide for students to learn about each tactic and fill in information during the class discussion; it also serves as a study guide for the subsequent homework assignment. At the end of class, a copy of the IBQ-G from Yukl et al. (2008, pp. 618–620) and the Part I homework assignment (Appendix B) are distributed. Alternatively, students can locate the IBQ-G through a search of their institution's library databases. For undergraduate students, we recommend assigning Hill (2008) and Yukl and Chavez (2002) as reading to accompany the homework. Additionally, for graduate students, we recommend assigning Yukl et al. (2003), Yukl et al. (1999), and Yukl (2012). Students are asked to read the assigned textbook and article readings and to complete the Part I homework assignment by the next class period.

The instructor collects the homework assignments at the beginning of the next class period and passes around a box of crayons so that each student has one. The homework assignment instructs students to ONLY write their name on the BACK of the assignment. This serves to protect the identity of the student during the in-class grading process. The instructor shuffles the assignments and then redistributes them throughout the class such that no students are grading their own assignment. Assignments are graded as a class. Students are asked to raise their hand whenever an incorrect answer appears on an assignment. We discuss and clear up any confusion on the correct answers. Students are asked to write the correct answer in crayon so that each student will have a correct version from which to study.

We execute the exercise in the classroom after students have gained knowledge about the proactive influence tactics through textbook readings, classroom discussion, and Part I homework assignment. We first pass out scenarios on a random basis (see Appendix D for sample scenarios). We then ask each participant to design separate influence attempts for each of the 11 tactics. Participants do not know which strategy they will be using during the actual influence attempt and so must learn how to use each. This process enhances students' learning by requiring them to think about the differences between tactics. Participants blindly draw the tactic just before attempting to influence the audience. The object is to use the selected scenario in a way that illustrates the proper use of the tactic without using any of the words in the tactic definition during the influence attempt.

The audience members individually identify which tactic they perceive the agent to be using by writing it on a small Post-It or sticky note. We collect the Post-Its by having respondents stick them on a blank sheet of paper on a clipboard as we walk by students' desks. We then discuss the correct answer and investigate the reasoning behind any incorrect answers. This process helps us clear up misperceptions about the tactics—both the agent's presentation and the targets' interpretations. We tie bonus points (or other silly but fun prizes) to the successful use of an influence tactic in order to encourage students to volunteer to be agents. In turn, targets tend to try hard to identify the agent's tactic so that they can award their fellow classmate (the agent) as many bonus points as possible. Thus, both agents and targets tend to become highly engaged in the exercise. At the conclusion of the exercise, students are assigned Part II of the homework assignment (Appendix F). Students read a short vignette and are asked to finish the storyline utilizing the 11 influence tactics effectively. Part II homework is due the following class period. Finally, students are asked to fill out the posttest (optional step).

The following section gives detailed training notes, student learning objectives, and step-by-step instructions for running the module and exercise. Supplementary materials are provided in the appendices. Appendix A is an interactive student handout that gives the definitions of the 11 proactive influence tactics and is helpful for classroom discussion. Appendix B is the Part I homework assignment that provides students the opportunity to learn the intricate differences between the tactics. Appendix C provides the solutions to the Part I homework assignment. Appendix D provides a list of sample scenarios for instructors to use in the exercise. Appendix E provides a list of the 11 influence tactics to be used in the exercise. Appendix F is the Part II homework assignment.

Step 4: Training notes for module and experiential exercise

Student learning outcomes

(1) Students will be able to distinguish at least three influence tactics that are most likely to elicit commitment in proactive influence attempts as a result of participating in the classroom discussion.
(2) Students will be able to articulate the differences between similar tactics identified in the classroom discussion (e.g., rational persuasion for the organization and apprising, exchange and collaboration, and finally, legitimating, coalition, and pressure) as a result of completing the Part I homework assignment.
(3) Students will be able to demonstrate knowledge of influence tactics, in both agent and target roles, as a result of participating in the experiential exercise.
(4) Students will be able to demonstrate influence skills by choosing situation specific influence tactics as a result of creating a narrative storyline effectively using influence tactics in the Part II homework assignment.

Day 1

Advance Preparation

Make enough copies of the Influence Tactic Classroom Discussion Handout (Appendix A), the Part I homework assignment (Appendix B), the IBQ-G from Yukl et al. (2008), and the pretest (optional) so that all students have a copy of each. Alternatively, instructors may choose to make these available to students through an online learning platform. It is imperative, however, that students have access to the Influence Tactic Classroom Discussion Handout (Appendix A) during this initial class period. Students will also need to bring hard copies of the IBQ-G and Appendix B to the following class period.

Step 1: Pass out a copy of the pre-test to each student. Allow students to fill in their answers. Collect the pre-test. (Optional, 15 minutes)

Step 2: Hand out copies of the Influence Tactic Classroom Discussion Handout (Appendix A) so that each student has a copy. Encourage students to take notes on this sheet as it will be a very useful study guide. (4 minutes)

Step 3: Discuss each influence tactic, its proper use, and the likely outcomes. Instructors are encouraged to incorporate the information provided in the training module to help illuminate the different aspects of each tactic, as well as the cultural considerations, and to even have students come up with examples of more effective usage of the tactics. (45 minutes)

Step 4: Distribute copies of the IBQ-G as well as the Part I homework assignment (Appendix B). Students will use the IBQ-G to help them to correctly identify the tactics in the homework assignment. Go over the instructions to the Part I homework assignment. Instruct students to bring a completed hard copy of the homework (Appendix B) and a hard copy of the IBQ-G to the next class meeting. Students will return the hard copy of the homework at the beginning of the next class meeting. The authors suggest that the homework be graded or that its completion allow students to earn bonus points. In practice, the students have taken the assignment seriously and have demonstrated thorough completion of the assignment when incentive is offered. Alternatively, instructors may choose to show the digital files of these documents on the classroom projector and allow students to download them at a later time. (5 minutes)

Day 2

Materials needed are:

- Crayons (enough so that each student has one).

Step 1: Remind students to only write their names on the back of the assignment. This is so that each student's identity will remain anonymous. Ask students to turn in the Part I homework assignment. (4 minutes)

Step 2: Pass the box of crayons around the room. Ask each student to choose a crayon (not white!). Students often take a quick trip down memory lane and get excited about using crayons. We often have students grade each other's homework using a crayon so that answers cannot be changed. (5 minutes)

Step 3: As the crayons are being passed around, shuffle the homework assignments to mix them up. Walk around the classroom distributing a homework assignment to each student. Make sure no students are grading their own assignment. (5 minutes)

Step 4: Go over homework in class to clarify any questions before conducting the exercise. Often, this is the time when students start identifying where they have problem areas in correctly identifying tactics. Instruct students to write the correct answer in crayon next to any missed questions on the assignment they are grading. Students can then have a correct version to use when studying. Because students are not grading their own work, we have found that students are more forthcoming in raising their hand and asking for clarification. Instructors can collect the assignments to record the scores or pass the homework back to students at this time. (45 minutes)

Day 3

Materials needed are:

- Two manila envelopes.
- Small Post-It notes (enough for each student to have 10–15 apiece).
- Blank sheets of paper (one piece for each student).
- One clipboard.
- Copies of Appendix D and Appendix E (enough for each student to have both a scenario and a tactic).
- One pair of scissors.
- One permanent marker.

Advance Preparation

Take a copy of the sample influence scenarios (Appendix D) and cut on the dotted lines. Instructors may want to take several copies of the scenarios and cut them up so students have an abundant number of choices. For an additional challenge, instructors with graduate students may assign each student to create their own scenario and bring it to class. Place the influence scenarios in a manila envelope for random selection. Label the outside of the manila envelope "Influence Scenarios." Follow the same process for the influence tactics (Appendix E). Place the influence tactics in the second manila envelope. Label it "Influence Tactics" on the outside.

Step 1: All class members come to the front of the class and randomly draw a scenario from the envelope. (4 minutes)

Step 2: Students are given 10–15 minutes to individually think about how they (as an agent) can use each of the 11 influence tactics in that particular scenario to influence the rest of the class (targets). (10–15 minutes)

Step 3: As students are coming up with possible examples, distribute blank Post-Its for audience responses. Announce that participants who volunteer to be agents will earn bonus points based on the targets' (i.e., the rest of the class) proper identification of the influence tactic. Depending on the size of the class, instructors may choose to award 0.25 or 0.5 points for each correctly identified tactic. Alternatively, other silly but fun prizes can be awarded. (4 minutes)

Step 4: One at a time, ask each volunteer agent to come to the front of the class. Have the volunteer randomly draw an influence tactic out of the envelope. The agent volunteer must use that tactic to try to influence the targets toward the task identified in their scenario. Instruct the agent that she or he cannot use any words used in the definition of the influence tactic and should only use one tactic to influence the audience. The agent's influence attempt can usually be accomplished in one or two sentences. (5 minutes per agent volunteer)

Step 5: Have each target (member of the class) identify the influence tactic used by the agent by writing the answer on a Post-It. Write the name of the student on a blank sheet of paper and place it on the clipboard. Collect Post-Its by walking through the classroom and having students stick the Post-Its to the paper on the clipboard. (4 minute per influence attempt)

Step 6: Debrief each influence attempt immediately after collecting the Post-Its. Discuss the different target guesses. What was the correct answer? What did the students hear that led them to choose a specific tactic as the answer? Did the agent correctly use the tactic? What could the agent have said differently? Targets, could you identify with or put yourself in the agent's shoes, in this situation? These questions lead to a rich discussion on the differences between the tactics and clear up any ambiguity in either the agent's behavior or the audience's interpretations of the influence attempt. It often takes this experience for students to recognize how perception, intended behavior, and actual behavior play a large role in leadership effectiveness and our interactions with others at the workplace. (5 minutes per influence attempt)

Step 7: Show Part II homework assignment (Appendix F) on the overhead screen. Go over the directions for the assignment. Students are asked to read the short vignette and complete the storyline by utilizing the eleven influence tactics into the story. Ask students to return the homework assignment by the next class period. Part II homework assignment serves as an assessment of the effectiveness of the training module and student learning.

Day 4 (Optional)

Materials needed are:

- Copies of the posttest for each studen

Advanced Preparation

Make a copy of the posttest for each student.

Step 1: Pass out a copy of the posttest to each student. Allow students to fill in their answers. Collect the posttest. (15 minutes)

Step five: Discussion

Students are often surprised at the difficulty of this exercise. Those who volunteer to go to the front of the classroom and influence the class are asked to think on their feet and often find this process more difficult than it looks from the safety of their classroom chair. The other classmates are often encouraging to the individual trying to influence the class. Because the bonus points or other silly but fun prizes are awarded, the class tries extremely hard to guess the correct tactic. This creates a fun and exciting classroom environment charged with energy. After completing the training module, we have noticed that students are more comfortable in the effective application of influence behavior both through scenarios utilized on subsequent quizzes and exams and in describing situations in which students used influence tactics in real life.

Research indicates that business school graduates must be able to effectively apply complex skills, such as influencing others, in order to be successful in the 21st-century workplace (Reitman & Schneer, 2008). We present a training module that takes students on a journey through Kolb's (1984) experiential learning process through guided discussion, multilevel assignments, and an exercise in which they learn by doing. This experience is an important step toward equipping students with the necessary tools to be successful upon graduation. However, with this stride of progress, there is still much work to be done through assessing the effectiveness of this training module in terms of student behavior changes and skill development. The heart of assessment is continuous improvement of student learning (Praslova, 2010).

The evaluation of learned skills is increasing in importance not only with accrediting bodies that want to ensure students achieve learning outcomes but also with numerous stakeholders such as students and members of the community who want to ensure that learning is occurring. Kirkpatrick's (1996) evaluation model recognizes four levels of criteria for assessing a training module. The four levels are as follows: reaction, learning, behavior, and results. Reaction-level criteria encompass participants' perception of the training, such as enjoyment of the training module or how much they think they learned. These data can easily be collected through posttraining questionnaires. Learning-level criteria concentrate on the interpretation of knowledge from the training module to usage of the actual skills on evaluations immediately at the conclusion of the training. Data from this level can easily be collected and assessed by investigating exam scores after students have completed the training module.

Behavior-level criteria call for an assessment of actual performance on the job and the effects the training had on workplace performance. In higher education, evaluating the behavior-level criteria of the model can become quite difficult and complex. Matching students who took part in the training and who are willing to continue to provide feedback or access to supervisor performance ratings will create a small data pool. The final level, results, is the most difficult level to evaluate because it attempts to connect the effect of the training to organizational outcomes such as increased productivity, customer service, or overall financial gains.

After an examination of Kirkpatrick's model, analyzing data at the first two levels would be a fairly simple undertaking for researchers. However, Hirst, Mann, Bain, Pirola-Merlo, and Richver (2004) recognize the depth of learning required for complex skills; their work suggests that actual learning of leadership skills is delayed, with growth in skill development taking place 8 months to a year after the training program. To complicate matters, daily practice of new skills is required for transfer of learning (Baldwin, Ford, & Blume, 2009) so that individuals will have opportunities to grow and become comfortable using the skills.

Facilitating an environment that supports the transfer of learning can be difficult, yet it is possible for instructors to do just that through course design and planning. Holton, Bates, and Ruona (2000) recognize key indicators of environments that support the transfer of learning. The first indicator concentrates on learning environments that are supportive in nature, where individuals feel comfortable stepping out of comfort zones, trying new experiences, and learning from mistakes. The second indicator emphasizes the sheer number of opportunities for individuals to practices these new skills.

The task for instructors at the conclusion of the training module is to create opportunities for daily practice throughout the duration of the course. Daily reflection journal entries that focus on influence attempts, their success or failure, the student's experience using influence tactics in workplace encounters, and so on can provide an avenue for students to reflect on skill usage and learn from experience. Instructors can use journal entries as a way to assess growth throughout the course. Another possibility is allowing one or two students to do the exercise to kickstart each subsequent class. This option would give students an opportunity to practice influence skills as either agents or targets and would be a simple way to get students into the classroom mind frame, much like a brain teaser or word puzzle would stimulate the flow of cognitive thinking at the start of class. A kickstart exercise would allow continuous practice of influencing others in both agent and target roles, as well as a controlled environment where the instructor can correct any misuses of a tactic. A few suggestions for incorporating influence skill development in the long term would require incorporating influence skills as an element of capstone courses. This path would take a large amount of planning and coordination among instructors and curriculum design. If at all possible, having students relating influence tactics to actual workplace or internship experiences would be ideal for students to make linkages from classroom experiences to the context of the workplace.

Finally, our experience with this training module has usually led class discussions to the topic of ethics and influence. Students often question the difference between influence and manipulation or what our ethical responsibility is when using influence tactics. Cialdini, a marketing and psychology professor, notes the collateral damage of unethical usage of influence tactics. Negative consequences of such behavior have resulted in ripple effects. Cialdini and Cliffe (2012, p. 79) write, "People will do things they see other people doing—especially if those people seem similar to them." He continues to argue that any short-term wins produced by unethical influence will be canceled out by long-term losses (Cialdini, Sagarin, & Rice, 2001). This usually steers our class discussion toward a debate of an age-old question: Do the ends justify the means? Cialdini (1999) would argue that partaking in unethical influence practices has negative consequences at both the individual level and the organizational level. At the individual level, conflict can arise with employees upholding ethical practices that can create a negative work environment. At the organizational level, long-term losses actually do outweigh any short-term gains achieved by unethical influence behavior.

Limitations and future research

This training module has only been utilized in the higher education setting. Future research should focus on influence tactic training interventions by human resource professionals. Empirical research is necessary in both the classroom and organizations, with additional testing of transfer of learning 8 months to a year after the initial training. The difficulty with assessing the development of complex leadership skills, such as the potential to influence others, is evaluating the skills over time. Instructors in higher education have limited time with students: often merely 8 to 15 weeks. Because of this limited time, greater coordination is necessary between lower level organizational behavior or leadership courses and incorporating the skill usage opportunities into capstone courses. At that time, the generalizability of this training module across mediums can be assessed.

Current research suggests that a training module like the one presented here is helpful for utilizing influence behavior in the workplace. Seifert, Yukl, and McDonald (2003) investigated training intervention—specifically, the intervention of a training workshop with coaching on correct usage of effective influence tactics such as consultation and collaboration was more successful in the respondents making a successful behavior change. Seifert and Yukl (2010) also found that multiple feedback workshops over time elicited positive behavior change and overall ratings of managerial effectiveness. Providing students an opportunity to hone these influence skills will give them a leg up in the workplace. More research is needed to investigate the level of knowledge retention associated with the first homework assignment (definition recall) and the higher level cognitive homework assignment (accurate situational usage of the tactics). Future pedagogical research on influence tactics and training interventions should focus on pinpointing the application of influence behavior in the classroom. Different pedagogical designs could be used to measure the students' learning and help determine whether one methodology is more effective in training influence behavior skills and in helping the participants/students retain the knowledge over time.

At a macro level, empirical research is necessary to test the effectiveness of the influence tactic training module. In particular, we provided specific and measureable learning objectives that need to be assessed. We included measures of general and task specific self-efficacy, as well as assurance of learning items on the specific influence tactics as a pathway for instructors to assess change in perceived student self-efficacy and knowledge in applying influence tactics. However, empirical research is needed in order to determine whether these measures adequately represent student perceptions-pre and post-training.

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Appendix A

Influence Tactics Handout for Classroom Discussion

Instructions: We will discuss each tactic together as a class. Please answer the following question for each of the influence tactics identified below.

On a scale of 1 to 10, how effective is this tactic on obtaining target commitment?

1______________________5______________________10

Resistance and/or sabotage Compliance Commitment

Rational Persuasion for the Organization (RPO): The agent uses logical arguments and factual evidence to show that a proposal or request is necessary to attain task objectives.

Answer:___ Example:______________________________

Apprising (APR): The agent uses logical arguments and factual evidence to show that a proposal or request will benefit the target personally.

Answer:_____ Example:____________________________

Inspirational Appeals (INSP): The agent makes an emotional appeal to the target's values and ideals during a request or proposal.

Answer: _____ Example:____________________________

Collaboration (COLB): The agent offers to provide resources and assistance or to share the benefits if the target will support or help with an activity or change.

Answer:______ Example:____________________________

Exchange (EXC): The agent offers to do something for the target in exchange for the target's doing what the agent wants.

Answer:______ Example:____________________________

Legitimating (LEG): The agent seeks to establish the legitimacy of a request or to verify that he/she has the authority to make it.

Answer:______Example:____________________________

Pressure (PRES): The agent uses demands, threats, frequent checking, or persistent reminders to convince the target to do something.

Answer:______Example:____________________________

Consultation (CONS): The agent seeks target input or active participation in planning a strategy, activity, or change for which target support and assistance are desired.

Answer:______Example:____________________________

Ingratiating (INGT): The agent uses praise and flattery or expresses confidence in the target during the influence attempt.

Answer:______Example:____________________________

Personal Appeals (PERS): The agent asks the target to carry out a request or support a proposal out of loyalty or friendship.

Answer:______Example:____________________________

Coalition (COAL): The agent enlists the aid of others or uses the support of others, to influence the target to do something.

Answer:______Example:____________________________

Appendix B

Part I: Influence Tactic Homework

****Please ONLY write your name on the BACK of this assignment****

RPO: Rational Persuasion for the Organization
COLB: Collaboration
APR: Apprising
INGT: Ingratiation
INSP: Inspirational Appeals
PERS: Personal Appeals
CONS: Consultation
PRES: Pressure
LEG: Legitimating
COAL: Coalition Tactics
EXC: Exchange

Please identify which influence tactic is being described in each of the following statements.

1). This tactic is the most likely to lead to resistance (although any of the tactics can lead to resistance if improperly used).

2). This tactic has the potential to result in the highest commitment of all the tactics.

3). This tactic is characterized by extrinsic motivation, and thus is likely to result in compliance. This tactic is behind compensation systems.

4). Indications are that males should **not** use this influence tactic when attempting to influence females. However, the same tactic is likely to successfully influence males when used by females. Please identify which influence tactic is being used in each of the following examples. Refer to the definitions given in the handouts. This person:

5). Uses organizational facts and logic to make a persuasive case for a request.

6). Appeals to your values and ideals when asking you to carry out a request or support a proposal.

7). Asks you to suggest ways to improve a plan or proposal that he/she wants you to support or implement. 8). Demands that you carry out a request promptly.

9). Offers to do something for you in return for your help on a task or project.

10). Asks someone else to help influence you to carry out a request or support a proposal.
11). Praises your skill or knowledge when asking you to do something for him/her.
12). Says that his/her request is consistent with organization rules and policies.
13). Explains how you would benefit personally from a proposed activity or change.
14). Asks you as a friend to do something for him/her.
15). Uses stirring, emotional language to build enthusiasm for a proposed activity or change.
16). Offers to help you implement a change if you agree to make it.
17). Repeatedly checks to see if you have carried out a request.
18). Asks other people in the organization to explain to you why they support his/her proposal.
19). Explains clearly why a proposed change is necessary to accomplish organizational objectives.
20). Asks you to suggest things you could do to help him/her attain a task objective.
21). Gets help from someone with higher authority when trying to influence you.
22). Asks you as a personal favor to help him/her accomplish a task.
23). Offers you an incentive or reward for doing what he/she wants.
24). Provides a detailed explanation of the benefits to you for fulfilling a request.
25). Expresses confidence in your ability to carry out a difficult request for him/her.
26). Appeals to someone with higher authority to back up a request to you.
27). Makes an inspiring speech or presentation to gain support for a proposed activity or change.
28). Strongly insists that you must carry out a request.
29). Explains how a proposed change would make it easier for you to do your job.
30). Offers to give you something you want in exchange for doing what he/she wants.
31). Verifies that a request is legitimate by referring to a document such as a work order, policy manual, or a memo from management.
32). Asks you to help plan an activity or project that he/she wants you to support or carry out.
33). Offers to share the benefits from a project or activity if you agree to help with it.
34). Praises your past accomplishments when asking you to do a task.
35). Describes a clear, inspiring vision of what could be accomplished by a proposed project or change.
36). Keeps asking you persistently to say "yes" to a request.
37). Brings somebody along for support when meeting with you to make a request or proposal.
38). Explains how a proposed activity or change would help your career.
39). Says that it would mean a lot to him/her if you would agree to do what he/she is asking.
40). Says that you have the unique skills and knowledge needed to carry out a difficult request.
41). Says he/she will provide resources and assistance if you agree to do a task.
42). Encourages you to express any concerns you have about a proposed change that he/she wants you to support or implement.
43). Says that his/her request or proposal is consistent with tradition and precedent in the organization.
44). Uses threats or warnings in an attempt to get you to do something.
45). Offers to do something for you in the future in return for your help now.
46). Explains how a proposed activity or change would help you get something you want.
47). Explains how a proposed change will increase efficiency, productivity, or profits.
48). Says that what he/she is asking you to do has been approved by someone with higher authority.
49). Develops enthusiasm for an activity by accomplishing things never done before.
50). Offers to help with a task if you agree to do it.
51). Expresses respect for you before making a request.
52). Explains how you would benefit by doing a task for him/her (e.g., learn new skills, meet important people, enhance your reputation).
53). Mentions the names of famous people who endorse his/her proposal when asking for your support.
54). Asks you to help plan a change that he/she wants you to support or implement.
55). Provides evidence that a proposed change is likely to be successful in the organization.
56). Offers to do a specific task for you in exchange for carrying out a request for him/her.
57). Offers to show you how to do a task that he/she wants you to carry out.
58). Tells you he/she is in a difficult situation and would really appreciate your help.
59). Says you are the most qualified person for a task that he/she wants you to do.
60). Asks someone with higher authority to help influence you to do something.
61). Verifies that his/her request or proposal is consistent with policies and standard procedures.
62). Reminds you insistently that a request has not been carried out yet.
63). Modifies a request or proposal to deal with your concerns or incorporates your suggestions.
64). Asks you to talk with someone else who supports his/her plan or proposal before making up your mind about it.
65). Offers to work with you if you will do an unscheduled task for him/her.
66). Says that he/she needs to ask for a personal favor before telling you what it is.
67). Offers to help you solve a problem that is preventing you from carrying out his/her request.
68). Talks about values and ideals when proposing a new activity or change.

Appendix C

Influence Tactic Homework Part I: Answer Key

1. PRES	18. COAL	35. INSP	52. APR
2. INSP	19. RPO	36. PRES	53. LEG
3. EXC	20. CONS	37. COAL	54. CONS
4. INGT	21. PRES	38. APR	55. RPO
5. RPO	22. PERS	39. PERS	56. EXC
6. INSP	23. EXC	40. INGT	57. COLB
7. CONS	24. APR	41. COLB	58. PERS
8. PRES	25. INGT	42. CONS	59. INGT
9. EXC	26. PRES	43. LEG	60. PRES
10. COAL	27. INSP	44. PRES	61. LEG
11. INGT	28. PRES	45. EXC	62. PRES
12. LEG	29. APR	46. APR	63. CONS
13. APR	30. EXC	47. RPO	64. COAL
14. PERS	31. LEG	48. PRES	65. COLB
15. INSP	32. CONS	49. INSP	66. PERS
16. COLB	33. COLB	50. COLB	67. COLB
17. PRES	34. INGT	51. INGT	68. INSP

Appendix D

Influence Tactic Scenarios

————————————————————————

You (the agent) are trying to convince your professor (the target) that your dog ate your homework and therefore you could not turn it in.

————————————————————————

A potential employer has flown you (the agent) to its headquarters in another state for an interview. You are trying to convince the hiring committee (the targets) that you are the best candidate for the job even though you do not know anything about the other candidates

————————————————————————

You (the agent) are a salesperson representing a wireless phone company. You are trying to convince a customer (the target) to upgrade to the newest iPhone.

————————————————————————

You (the agent) are a management professor at a university. You are trying to persuade someone from among your students (the targets) to become a student ambassador for the college of business.

————————————————————————

You (the agent) are the sales manager for a production company. You promised a customer that your company could produce a special order over the weekend. Now you must convince the production manager (the target) to produce that product despite hardships for the production department to do so.

————————————————————————

You (the agent) are the dean of your business school addressing an honors class of graduating seniors (the targets). You want to persuade the students to attend graduate school.

————————————————————————

You (the agent) are trying to convince the audience (the targets) to vote to legalize marijuana in tomorrow's election.

————————————————————————

You (the agent) are trying to convince your coworkers (the targets) to select you as the leader for the sales team.

————————————————————————

You (the agent) are a Human Resources manager at a local fast food restaurant. You are trying to convince your employees (the targets) to have perfect attendance at work.

————————————————————————

You (the agent) are trying to convince your boss (the target) to let you leave work early on Friday.

————————————————————————

You (the agent) are a student who missed taking an exam in your Leadership class. You are trying to persuade your instructor (the target) to allow you to retake the test.

————————————————————————

You (the agent) are an engineer developing a new eco-friendly elementary school in your community. You are addressing city council members (the targets) in a meeting and are trying to convince them to grant you the building contract.

————————————————————————

You (the agent) are a sales associate at Organic Supplements LLC, and you are persuading one of your firm's biggest customers (the target) to try the new protein-booster vitamin supplement in their health club.

————————————————————————

As the newest salesperson at A1 Automobiles, you (the agent) are trying to persuade a customer (the target) to purchase a brand new car.

————————————————————————

You (the agent) are trying to convince the city council members (the targets) to vote to raise the age limit for obtaining a driver's license from 16 years to 18 years.

————————————————————————

You (the agent) are a 4.0 GPA senior business student at State University. Your Leadership class has a team research paper assignment. You are trying to convince your teammates (the targets) to produce the best paper possible.

————————————————————————

You (the agent) are trying to convince the governor (the target) to put forth a bill legalizing marijuana usage.

————————————————————————

You (the agent) are the coach of a basketball team. You are trying to persuade a basketball super star (the target) to be more of a team player.

————————————————————————

You (the agent) are trying to convince someone (the target) to go out to dinner with you.

————————————————————————

You (the agent) are trying to persuade members in your work unit (the targets) to attend an office party.

————————————————————————

You (the agent) are a management professor and are trying to persuade the dean of the business school (the target) to reduce the number of students in business classes.

————————————————————————

Appendix E

Influence Tactics for Exercise

————————————————————————

Rational Persuasion for the Organization (RPO): The agent uses logical arguments and factual evidence to show that a proposal or request is necessary to attain task objectives.

————————————————————————

Apprising (APR): The agent uses logical arguments and factual evidence to show that a proposal or request will benefit the target personally.

————————————————————————

Inspirational Appeals (INSP): The agent makes an emotional appeal to the target's values and ideals during a request or proposal.

———————————————————————————

Collaboration (COLB): The agent offers to provide resources and assistance or to share the benefits if the target will support or help with an activity or change.

———————————————————————————

Exchange (EXC): The agent offers to do something for the target in exchange for the target's doing what the agent wants.

———————————————————————————

Legitimating (LEG): The agent seeks to establish the legitimacy of a request or to verify that he/she has the authority to make it.

———————————————————————————

Pressure (PRES): The agent uses demands, threats, frequent checking, or persistent reminders to convince the target to do something.

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Consultation (CONS): The agent seeks target input or active participation in planning a strategy, activity, or change for which target support and assistance are desired.

———————————————————————————

Ingratiating (INGT): The agent uses praise and flattery or expresses confidence in the target during the influence attempt.

———————————————————————————

Personal Appeals (PERS): The agent asks the target to carry out a request or support a proposal out of loyalty or friendship.

———————————————————————————

Coalition (COAL): The agent enlists the aid of others or uses the support of others to influence the target to do something.

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Appendix F

Part II: Influence Tactic Homework

Instructions: Read the short case below. Your task is to finish this case by effectively applying influence tactics into your narrative. You are required to utilize all 11 influence tactics discussed in class. As you read the case, please keep in mind factors that can impact the effectiveness of influence tactics: The direction of the influence attempt, culture, gender, and the overall appropriateness of the tactic for specific situations.

The Case: Influence at Creative Leadership Operatives

Colonel Reginald Mustard retired 2 years ago after a long military career as a decorated officer in the United States Army. He was known for his leadership abilities at home and while deployed. He joined the military when he was 18 years old and retired at 45. Retirement seemed like a good idea at the time. He could finally focus on fishing and building things in his woodworking shop. However, after 4 months of retirement, his wife mentioned that he was moping around the house. She was right. With the cold winter weather setting in, he had very few opportunities to get outside fishing or in the workshop. He did feel bored most of the time. She suggested looking into the private sector for a second career in a leadership position.

After a few days of mulling over the second career idea, he scheduled a lunch with an old colleague in the private sector. Sarah Yamamoto was an executive at Creative Leadership Operatives, better known as CLO. She worked with Reginald many times over the years developing leadership training programs for Army officers. Sarah, originally from Shanghai, moved to the United States for college. She landed a job with CLO after her MBA program and had been with the firm for the last 15 years. During the course of lunch, Sarah mentioned a new position opening at CLO. As CLO branched out into new markets, they were looking for someone to lead a Special Projects team. Being familiar with the colonel's leadership experience in the military, Sarah felt that Reginald would be the perfect individual to bring a successful project team together.

After meeting with HR and going through an interview process with several other qualified candidates, Reginald was offered (and accepted) the Special Projects team leader position. He would begin work at the start of the New Year.

A few weeks later

Sarah could only find a few minutes to brief Reginald about his new team and the Anfield project before she introduced him to all the employees at CLO's New Year Kick Off meeting. Sarah would introduce Reginald as the new leader of the Special Projects team, introduce him to his team members, and briefly go over the Anfield project. This will be the first time the team members have heard about new project.

They both grabbed a cup of coffee from the downstairs café and began walking back to the conference room on the top floor of the building.

"You have a diverse mix of people on your team, Reginald. Although, it will be a much smaller group than you are used to. All of the team members will report directly to you, except for Penny Peacock. Penny reports to the head of the R&D department. Technically, you and Penny hold the same organizational rank. You won't be disappointed. They are some of the best talent at CLO," Sarah said.

"Professor Percival Plum works in the college of business at Martinsville University and does consulting work with us on the side. He is the best data analyst we have on staff. He's not much of a people person, but give him the numbers and he will make sense out of them. Mr. Gerard Green is a whiz kid on social marketing. He's a newly minted MBA and shows great promise. Mrs. Wendy White has been at CLO for 10 years and is one of our best account managers. She has a knack for developing relationships, networking with potential clients, and specializes in conflict resolution. Ms. Penny Peacock worked for Google for 5 years and Pixar for 3 years before that. She is our innovation specialist. She is a free spirit and likes to set her own hours, but give her a problem to solve and she will come up with something brilliant. Last, but not least, is Ms. Stella Scarlet. She is our event planner. Prior to working for CLO, she was an event planner and fundraiser for a children's hospital in New York."

"Reginald, we need you to take on the Anfield project. Anfield is a national fitness club chain that is looking to build six new locations in our community. They are looking to create community outreach events and would like to focus on the aspect of family wellness focused at getting kids active."

They arrived at the conference room.

"Well, here we go. Let's get the meeting started," Sarah said and she held the door open for Reginald.

One hour later

Reginald gazed out of the window of his office. It had started snowing, and ice was starting to form on the street below. Ice cold. That was the best way to describe the mood of his new team members. Sarah had done everything she said she was going to do: briefly introduced him as the new Special Projects team leader, introduced him to his team, and briefly mentioned the upcoming Anfield project. He had hoped to talk with his team at the end of the meeting, but no one stuck around.

With the start of the New Year, Reginald was hopeful that it would be full of new opportunities, especially with the Anfield project on the horizon. As of right now, it only seemed to be full of headaches. The private sector was much different than the authoritative structure of the military. He was used to giving an order and having it followed without question. How was he going to influence the individuals on his team to be committed to this project? He decided that the best approach was to meet with each person individually and discuss their role in the Anfield project. With a deep sigh, he plopped into his office chair and began preparing for the individual meetings with each team member.