

Influence Strategy Worksheet

Influencing stakeholders is one of the most important parts of enabling the frontline — and one of the most challenging. You can have the right strategy, the right tools, and the right intentions, but progress stalls if the people around you don't see the value or practicality in moving forward.

This worksheet helps you take a more intentional approach to influencing. It will help you determine what matters to each stakeholder, connect frontline enablement to their priorities, and choose the right way to engage them. The goal is not to “sell” an idea. It is to align your work to real business outcomes and foster support through relevant, focused interactions.

YOUR GOAL (what you aim to achieve to through influence)	
MEASUREMENT (how you will know you achieved your goal)	

1) Who are they?

Identify the stakeholder you wish to influence to advance your practices.

STAKEHOLDER NAME	
THEIR ROLE / FUNCTION	
THEIR INFLUENCE LEVEL (high / medium / low)	
THEIR CURRENT PERSPECTIVE (champion / neutral / skeptic / blocker)	
YOUR RELATIONSHIP (strong / developing / limited / nonexistent)	

2) What matters to them?

Do your homework to determine what's most important to your stakeholder every day.

TOP 3 CURRENT PRIORITIES	1) 2) 3)
KEY METRIC(S)	
BIGGEST CURRENT CHALLENGE	
NOTEWORTHY PRESSURES	

3) What's in it for them (WIIFT)?

Translate your solution into outcomes your stakeholder already cares about.

RELEVANT PROBLEM(S) YOU WILL HELP SOLVE WITH YOUR SOLUTION	
RELEVANT BUSINESS IMPACT(S) OF YOUR SOLUTION (KPIs) (revenue, risk, productivity, etc.)	
WHAT SUCCESS WILL LOOK LIKE FOR YOUR STAKEHOLDER	

4) What's your core message?

Prepare a clear, specific, relevant elevator pitch for your proposed solution.

<p>HOOK (why this matters)</p>	
<p>SOLUTION (what you're proposing)</p>	
<p>VALUE (why it matters)</p>	
<p>PROOF (one data point, example, story)</p>	
<p>ACTION (next step)</p>	

5) What pushback do you anticipate?

Prepare for likely objections you will hear from your stakeholder.

CONCERN / OBJECTION	CONSTRAINT(S) TO ACKNOWLEDGE (time, budget, priorities, etc.)	YOUR RESPONSE (grounded in the WIIFT)

6) What's the best way to approach your stakeholder?

Plan how you will engage based on your goals, relationship, and opportunity.

APPROACH	<input type="checkbox"/> 1:1 <input type="checkbox"/> Informal Chat <input type="checkbox"/> Small Group Meeting <input type="checkbox"/> Formal Presentation <input type="checkbox"/> Project Request <input type="checkbox"/> Intermediary
TONE	<input type="checkbox"/> Operational <input type="checkbox"/> Strategic <input type="checkbox"/> Empathetic <input type="checkbox"/> Expert
TIMING (competing priorities, availability, etc.)	
ASK (specific action / next step)	

7) What are your influencing tactics?

Select the method(s) that will have the greatest impact on your stakeholder's perspective.

- CASE STUDY (prove your solution has delivered results for other teams / organizations)
- EXTERNAL SME (add credibility by leveraging a trusted outside voice)
- REPORTING (build confidence in business impact through tests, pilots, and metrics)
- ROADMAP (show a clear, structured plan moving forward)
- YES, AND ... (integrate your solution with familiar, accepted methods)
- FUNCTIONAL SUPPORT (help them solve a problem that matters first)
- PEER CHAMPION (reinforce your message through trusted peers)

8) What assets will you need?

Determine which support tools must be developed to support your influencing efforts.

<p>SUPPORTING MATERIALS (case studies, data, slides, documentation, demos, etc.)</p>	
<p>RELEVANT EXAMPLES (internal challenges, stories)</p>	
<p>ALLIES (partners to include / reference)</p>	

9) What's your conversation plan?

Outline your interaction so you're ready to engage a busy stakeholder.

<p>OPENING (quickly frame why this conversation matters)</p>	
<p>KEY QUESTIONS (get them talking about priorities, challenges, goals, needs)</p>	
<p>CONNECTION POINTS (link responses to the WIIFT)</p>	
<p>PITCH (present your solution with a focus on impact, not features)</p>	

<p>CLOSING (confirm alignment and define next steps)</p>	
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10) How will you follow up?

Plan your next steps, including reflection on the success of your influence activities.

<p>EVALUATE (current success level)</p>	
<p>ADJUSTMENTS (changes to your strategy)</p>	
<p>NEXT STEPS (continue influencing efforts)</p>	