

FORCES OF INFLUENCE

HOW
EDUCATORS
CAN LEVERAGE
RELATIONSHIPS
TO IMPROVE
PRACTICE

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Introduction



First of all, hi, we're Fred and Meghan. We've spent the last few years researching, reflecting on, and reacting to situations that have confronted us in both our professional roles as director of curriculum and instruction and mathematics coach, respectively, and our personal lives. We've looked at their connection to the people we work with, the processes we engage in, and the products we create. Based on our experiences and those of others, this book is all about how educators can more effectively use relationships to support one another's practice and push for stronger positive outcomes for all learners. It's about how we can most effectively influence others to bring about needed change. So with this introduction in place, which is the start of any good relationship, we're glad to meet you, and we hope you'll read on.

We thought we couldn't talk about relationships without explaining how we became coauthors for this book in which relationships feature so prominently. It was a dark and stormy night. . . .

But, no, really, we met at a professional leadership conference some years ago. Through both professional networking at the conference and more personal networking among friends, a small group of like-minded individuals decided that we enjoyed one another's professional insights and personal commentary so much that we should keep in touch after the conference. Through a social media

app, a group of about 12 people continued discussing their professional lives and interests. As time wore on, this group whittled down to six. By checking in daily and listening to one another's needs, our group became close critical friends professionally as well as personally. Through increased trust and respect, a number of us have collaborated on presentations, writing projects, and committee work.

On the basis of shared interest and a presentation that we facilitated a number of years ago, both of us felt that we had the interest and capacity to put together a book on relationship building and leveraging relationships to do great work. And the rest is history (or not quite history, but you get the idea).

A Look at the Book

It's helpful to start out by describing the lay of the land. In Chapter 1, "Influence: It's All About Relationships," we explain how relationships form—and how to leverage them to get things done. In Chapter 2, "Give to Get," we talk about the transactional nature of relationships and how leverage and influence come into play. Chapter 3, "The Forces of Influence," will introduce you to the Forces of Influence Leadership Matrix, which will help you nail your influence style.

Chapters 4 through 7 investigate each of the four forces we can use to influence change: the pull, the push, the shove, and the nudge. Quite coincidentally, we title these chapters "The Pull" (Chapter 4); "The Push" (Chapter 5); "The Shove" (Chapter 6); and "The Nudge" (Chapter 7).

But what happens, you may ask, when a force you've chosen doesn't result in the desired change? No worries; we've got your

back. We address this issue in the last two chapters of the book. In Chapter 8, “Stacking the Forces,” we show you how you can apply an additional force when the first one hasn’t worked, and in Chapter 9, “When Forces Succeed and Fail,” we look at how forces can go bad, but how you can recover.

A quick note: at the end of each chapter, we provide questions to spur reflection and action taking. You can explore the group questions through protocol use or open conversation. As for the tools shared in the book, and there are many—worksheets, self-assessments, templates, and more—you can find downloadable copies in our resource folder at <http://tiny.cc/ForcesofInfluence>. We also offer several in-depth tools in the Appendices located at the end of this book.

So now, read on!

1

Influence: It's All About Relationships



As you begin this chapter, you're likely hoping for ideas, tips, and tools to promote the relationships you've spent time crafting so you can continue to get the good work done. And you might be wondering, in fairness, if starting with a look at relationships is taking two steps backward. After all, you may already understand the value of relationships, and you may already be a leader who focuses on the interactions you have with others.

Those are valid points, but the goal of this first chapter isn't simply to convince you that relationships are important. Rather, it's to understand how relationships form and what enables them to thrive or falter. This, in turn, will help provide context as we explore how to leverage relationships to get things done; it will also help explain why certain Forces of Influence (the pulls, pushes, shoves, and nudges we will explore throughout this book) work and don't work in certain situations. It's just as important for the artist to have the right easel and paints as it is to actually know how to paint the

picture. Therefore, before we strategize about leveraging relationships, it pays to remind ourselves of how and why the relationships we engage in daily flourish—or don't.

Why Relationships Are Important

When we consider the essential things in life, the backbone behind our actions and feelings, relationships are at the forefront. We can pare down why we work and what we love to our connections with others and to the thoughts, feelings, and needs that drive and sustain those relationships. If relationships are at the heart of our “why,” then it follows that relationships are paramount to our work and personal lives.

Research tells us that healthy relationships are key to healthy living. Those who struggle in their relationships often suffer the same negative side effects as those who smoke or who suffer from obesity, such as depression, decreased immune function, and high blood pressure (Kreitzer, 2016). Good relationships have mood-boosting effects, and people who have healthy social relationships have a 50 percent higher survival rate than those who don't (Holt-Lunstad, Smith, & Layton, 2010). Above and beyond these very real health benefits, good relationships become even more necessary and powerful when it comes to influencing others.

Consider the common workplace dilemma. When tasked with overcoming an obstacle, from whom are you most likely to solicit advice? Likely, you'll go to your closest coworkers, friends, or mentors, those who have a track record of giving valuable counsel. Even those with whom you worked previously are more likely sources of feedback than mere acquaintances. When someone you don't know

well jumps in to give you advice, however well intentioned, how likely are you to listen? We tend to avoid opening up our personal circles of trust and often become antagonistic toward ideas that come from outside an existing relationship.

Power in relationships fluctuates with the types of decisions being made. For instance, you might wield great influence over your friend's vacation choice but far less influence over his or her financial plans. And although power isn't always synonymous with influence, a certain degree of power is necessary to effect change in others. That power comes as a direct result of the relationship forged. In 1983, Huston suggested a theory called *power in relationships*, which suggests that power is the ability to exert influence and that this influence depends on what each person in the relationship is thinking, feeling, and doing at the time. As you might have noticed in your own personal and professional relationships, the power of influence from a friend, a relationship in which you feel comfortable and secure, is often better received and more likely to be acted on than influence coming from someone you know less well.

Fostering relationships, then, not only supports your own well-being but also smooths the way to exert influence over others for positive change. That being the case, how do we build and sustain such relationships?

Building relationships differs from networking, something we all increasingly find ourselves engaged in. Although networking is often a one-and-done experience to amass potential connections, relationships are much more complicated; they require energy and intention for the long haul. Shelley Zalis (2018), chief executive officer of the Female Quotient, says it well: "Networking is nine to five; relationships are forever" (para. 9).

The Stages of Relationships

On the basis of our work in this area, we see four stages in relationship growing.

Introduction Stage

In this stage, potential relationship builders meet. This might involve a face-to-face, verbal, or written meeting or a hybrid version of these. During this phase, those involved are listening to what is and isn't being said. Often it's just as much about assessing the transactional value of the relationship that is forming (more on this later) as it is about assessing the value of the content being discussed. For the relationship to move beyond this stage, those involved have to see the value of both continued interaction and, down the line, potential quid pro quo. (Set aside your possible discomfort with that term and, for now, just know that every relationship forms for a reason.) Networking goes through this stage as well, but it often never advances further.

Testing Stage

Every relationship requires a large amount of energy to build and sustain (even the ones we're born into). To determine whether we should invest that energy, we need to test the beginning of a relationship to see whether it can withstand simple stressors and whether it can lead us to improve the work we do with others and ourselves. The testing stage can be short or long, depending on the desired scope of the relationship.

For example, the testing stage for a fellow student who lives two doors down from you on a college dorm floor would be shorter than

that for a potential life partner or spouse. This stage often involves probing questions that get to the beliefs and values of those involved, as well as activities that might provide insight into whether the relationship partner will or won't carry his or her own weight when relationships build.

Trusting Stage

Once a level of trust has been established, doors open up, guards are let down, and relationships take on more meaning and can accomplish greater things. The trusting stage can be somewhat lengthy as those involved share personal information, continue to meet and work together, and show who they really are. Because members of the relationship feel supported and cared for by their partners, they can make mistakes from time to time without fearing that those blunders will result in the breakdown of the relationship.

Interestingly enough, it's also here that the direction of a relationship is charted. Will the relationship move beyond a friendly one to a more intimate one? Work by Arthur Aron and colleagues (Goodwin, 2018) identified a series of 36 questions (Jones, 2015) that may be asked during this stage that can help direct how a relationship grows. For example, "For what in your life do you feel most grateful?" or "If you could wake up tomorrow having gained one quality or ability, what would it be?" Such questions are worth exploring for the impact they can have on a relationship's direction.

Bonded Stage

In relationships that reach this stage, members are tied tightly together. They know enough about the others in the relationship to identify strengths and weaknesses, and they're comfortable enough

with their place in the relationship to be honest, open, and, for lack of a better word, themselves. Once in the bonded stage, we have to do three things to sustain our relationships:

- **We need to check in.** All productive relationships require regular check-ins. “Regular” will depend on the strength of the bond that holds the relationship together. Without checking in, no relationship will be sustained. Checking in can be as simple as making a phone call, sending an e-mail or a text, visiting someone, or sending a card. Some methods of checking in won’t work for certain relationships. The good news? By the time a relationship has reached the bonded stage, members tend to know what works and what doesn’t. Check-ins are really the most important step to sustaining relationships; they’re a must in the sustaining toolbox.
- **We need to add fuel.** Relationships are built on energy. It takes energy to form and sustain them, and it consumes quite a bit of emotional energy when they fall apart. To sustain relationships, we have to add fuel. We can do this in many different ways, such as embarking on a new experience together, adding a new person to the relationship, or trying to solve a challenging problem. Negative circumstances, such as a death in the family or losing a job, can also add fuel, and those circumstances, too, can strengthen relationship bonds. We need to add fuel to keep relationships moving, and we have to do so consistently.
- **We need to self-reflect.** To determine whether we want to keep a relationship going, we need to ask ourselves what our true investment is in it. Is it worth our time and energy? What

will it take to keep things moving? How often we consider these questions depends on how important the relationship is to us and how regularly we add fuel and check-ins. The point is, relationships are always two-way streets. We have to continually think about them to make sure we keep them going (or don't).

Fostering Good Relationships

According to research, various structural foundations can help foster relationships. In his work on networking, Baker (1994) maintains that working with an adversarial approach doesn't lead to success the way building on consensus and mutual interest can. For example, enabling people to get the tools they need to work effectively can build lasting relationships. Research from Gratton and Erickson (2007) on relationship building in the business world also provides insight. Some actionable steps include the following:

- **Create teams where some relationships already exist.** Building on existing relationships supports relationship development. If you're working in a team structure, pulling in a known entity can help everyone feel comfortable and allied from the start. Think of this as a double date. The pressure of building a relationship is lessened by having a friend around. The same thing can be true when building professional relationships.
- **Provide time and space for building social relationships.** Gratton and Erickson offer the example of the headquarters of the Royal Bank of Scotland, which was designed with communal areas, atriums, and eating spaces to encourage the

formation of social relationships among employees. Although few of us are in a position to redesign the layout of a building, creating social opportunity within workspaces is possible. Push tables together for more collaborative space, or encourage lunching together. Be intentionally visible before or after school, and open conversation with others. Small moves make big gains in relationship building.

- **Be task oriented initially and build the relationship over time.** When relationships are not yet bonded, staying task oriented can foster collaborative work. Gratton and Erickson (2007) suggest leaving the path to finishing a task less well defined; this fosters the need for people to work together and build relationships within the framework of that task. Baker (1994) adds that forming groups around the interests of those involved helps build stronger teams and stronger relationships.

The magic of connection also plays a role in the process. Think of building a relationship as learning to read. You learn the basics of letters, sounds, and word formation, all while developing vocabulary outside your focus on learning to read. At some point, some connection you make takes sounding out words, determining context, and comprehending to a whole new level. And that's just how it is with relationships. You can work through the stages and societal norms of crafting a relationship, you can have the standard meeting over coffee and camaraderie at the water cooler, yet there's a certain amount of connection that draws us closer in some relationships than in others.

Ibarra and Hunter (2007) cite three interdependent forms of connecting—operational, personal, and strategic—that they looked at through the lens of networking. We contend that their work

also applies to the more complex nature of relationship building. *Operational relationships* are focused on accomplishing work and are based on who is needed to execute a task. *Personal relationships* are cultivated to help achieve one's future goals, but the players are less defined because you never know to whom those contacts might connect you in the future. *Strategic relationships* are focused on making connections for future stakeholder support but are less personal in nature. The managers studied didn't always readily understand the importance of building more personal relationships, but Ibarra and Hunter found that doing so leads to creating a safe space. And that safe space is where relationships become the foundation for allowing influence to happen.

Four Essential Keys to Relationship Building

Research overwhelmingly shows that listening, trust, respect, and collaboration are the four keys to building successful relationships. With the right percentage of each ingredient (which varies from relationship recipe to relationship recipe), we can build any successful relationship. If you experiment with the emphasis you place on each of these four ingredients, you'll eventually find the best recipe for that relationship. This trial-and-error approach is why relationship building has so many stages and is so complex (and why it often takes many tries to make the perfect cake).

Listening

Listening sets the stage for all other communication and relationship building to happen. Although people generally don't feel

called on to improve their listening skills, the average person listens with only 25 percent efficiency (Huseman & Lahiff, 1981). Effective listening involves maintaining interest at a deeper level than simply taking in information and responding so the speaker knows you're listening. It's only true interest that enables relationships to grow and flourish beyond the early stages. Listening without the intent to respond or offer advice—listening to understand—goes against our problem-solving and “me first” society. To master effective listening, you have to actively practice the skill (Williams, 2004). The best listeners are empathetic, keep an open mind, pose significant questions, and don't become defensive (Holmes, 2017). Good listening sets the foundation for trust and respect to build.

Trust

Trust is of great value in our interactions with others, be those interactions personal or professional. According to Michelle and Dennis Reina of the Reina Trust Building Institute, “Business is conducted through relationships, and trust is the foundation of those relationships” (Reina & Reina, 2007, p. 36). Building trust is all about doing what we say we're going to do. When we make a promise or state a claim and then deliver on it, we prove our word is good. And when our word is good, it's more likely people can believe what we say will happen without worrying about whether it's actually going to happen or not. The Great Workplace model (Burchell & Robin, 2011) lists credibility, respect, and fairness—the basics of trust—as the foundations of an ideal working environment. How safe people feel relates directly to the level of trust they have in an organization, a leader, or a relationship.

Note that trust is earned over time, little by little. We've all experienced the over-sharer, that person who creates an awkward balance by sharing too personal an experience early on. Likewise, collegial relationships are most effective when members share professional challenges a little at a time and when they avoid being too blunt in expressing their opinions and challenging ideas. Trust takes time to develop.

Respect

A study (Porath, 2014) that included more than 20,000 employees worldwide found that no other factor has greater influence on employees than respect. When people feel respected, they are happier, experience greater fulfillment in their jobs, and are more likely to stay engaged. That said, respect can be one of the trickiest aspects of a relationship to develop. Respect is different for all people; it depends on culture, generation, gender, industry, and societal norms.

Darwall (1977) states there are two types of respect: recognition respect and appraisal respect. *Recognition respect* is the basic respect we should have for all human beings. It's a kind of moral obligation to treat others well. When we respect others, we let them be who they are, and we make sure we welcome all they bring to the table (although, in fairness, there's only so much potato salad you can bring to one table). This type of respect is pretty easy to showcase. We simply have to see the good in each and every person we encounter and value them for the person they currently are and not necessarily for the person we wish they would be. *Appraisal respect* means weighing another's qualities and finding him or her worthy. It's the kind of respect you work to earn in a relationship. So how can you

cultivate appraisal respect? By listening and building trust, by being honest about what you're willing and unwilling to do, by engaging in active listening, and by being supportive in all you do. Respect is built over time through consistent and reliable interactions.

Collaboration

With respect well established, you can move on to productive collaboration. Relationships can only form if the opportunity to work together for the common good comes into play. We need collaboration to be in place if we're going to be effective at using relationships to influence and support others. The need to communicate effectively, cooperate, and be comfortable with an action “not going your way” are key tenets of successful collaboration.

Why is collaboration so important when it comes to relationship building? Because collaboration is about “doing,” and when we “do” something together, we bond better. One of the best ways to foster a collaborative stance is to recognize that every idea is valuable. As Anthony Kim and Alexis Gonzales-Black discuss in their excellent book *The New School Rules* (2018), we can become better at learning, growing, and taking action if we adopt a “safe enough to try” mentality. This approach makes collaboration easier because it values proposals and experimentation rather than solutions, perfection, or consensus. Collaboration is always about focusing on key outcomes and using one another's strengths to achieve an overarching goal.

To keep our minds on these foundations, we've devised a Relationship Audit that you can use to reflect on your relationships with others (see Figure 1.1). It's simple, really. At the top, jot down the relationship you want to audit. Then fill in the activities or events that have occurred with this person (or people) over the last day, week, and month. Finally, consider the roles held. Were you a Giver?

Figure 1.1 Relationship Audit

The purpose of this tool is to help you gauge where your current relationships stand. It will help you determine whether you need to put additional work into sustaining those relationships or whether you can back off and focus on others.

Relationship to Review (include all people involved):

Length of Relationship Through Today (be specific):

Frequency of Contact with Relationship Participants Over the Last Week, Month, and Year:

Week	Month	Year

Relationship Roles Held Over the Last Year (be specific):

Giver	Taker	Wonderer

Do you need to put more work into this relationship? To answer this question,

- Reflect on the length of the relationship. Longer-term relationships can generally withstand less constant contact.
- Count how often you have contacted relationship participants. The higher the number of contacts, the better, and the less likely that you'll need to put more work into the relationship currently.
- Explore the ratio of roles held. If one person is occupying one role more often than others, this could indicate the need to strengthen the relationship by bringing balance to the roles.

A Taker? A Wonderer? (If you need additional clarification about what these roles entail, we expand on them below.)

When you've completed the audit, ask yourself two questions: (1) Have I been remiss in focusing on one of the four relationship foundations—listening, trust, respect, and collaboration—at the expense of another? (2) Did I do a great job building this relationship but a poor job sustaining it? (To answer this question, look at your frequency of contact data.) Relationship audits don't necessarily solve any of our relationship problems, but they do bring to light the fact that no relationship can exist in a vacuum; it takes work to build and sustain the connections we have.

The Roles We Play

So let's take stock. We've talked about why relationships tend to form, the different layers of relationship building, the ingredients for sustaining relationships, and the four building blocks of relationships. There's one last piece to discuss before moving on: the different roles we occupy when playing a part in relationships.

As we'll attempt to show over the course of this book, all relationships are transactional (well, almost all; there really isn't anything you can do about your crazy Aunt Jill). As we'll also attempt to show, there's nothing bad about coming to this realization.

The simple fact is this: we form the vast majority of relationships because we believe that we can give something to the other person (or people) in the relationship and that they, in turn, can give something to us. The "something" doesn't have to be a physical product. It can range from support, counseling, and love to a job, a written recommendation, or a brand-new car (we're game show fans here).

And regardless of whether the giving and taking involve something “holdable” or not, there are three roles we consistently play in relationships. Here they are, in no particular order (and note that over the course of a relationship, we’re apt to switch these roles many, many times):

- **Giver:** When operating in this role, we’re the ones completing the transaction for the other person or people. There’s something we need to be giving to fulfill needs, whether it’s affection, a sympathetic ear, or a peanut butter and jelly sandwich. When serving as a Giver, we’re technically in control of where the relationship goes next. By fulfilling needs, we allow the relationship to move to the next transaction, where the roles may switch. If we don’t fulfill the need, the relationship is likely to stay put and continue by virtue of the ingredients used to originally build it, or fall apart because it’s difficult to sustain.
- **Taker:** The Taker in a relationship is simply that. It’s the person or people who have needs that must be fulfilled and who “purchase” something from the Giver. This can be a monetary purchase, certainly, or it can be a different type of withdrawal, such as from a bank of emotions. Takers take something from others as a way of fulfilling needs, sometimes leaving Givers with less, and sometimes leaving them with more. For any relationship to grow and flourish, both these roles must always be present. As with the Giver, a Taker can sometimes overstay the role. Relationship participants who spend too much time in one of these roles can get burned out or can burn out the relationship.

- **Wonderer:** When relationships are starting out or when a relationship transaction has been completed, there's often a sense of the unknown regarding the next role to play. In these situations, relationship participants enter the Wonderer role, which is focused on identifying the next opportunity for those involved to support one another. For example, Meghan recently was the subject of a case study in teacher leadership. When the case study was finished, she and the interviewer entered the wondering stage, where their relationship going forward was unknown. Would the interviewer call on Meghan again? Would Meghan reach out and ask the interviewer to participate in her own study? Would they remain friends or colleagues, or go their separate ways? Participants can spend a substantial amount of time in this role; at this point, the effort that goes into sustaining the relationship is of the greatest importance.

In the next chapter, we'll shift to exploring the transactional nature of relationships in greater detail by looking at influence, its power, and why influence is necessary for all leaders and learners.

Questions for Self-Reflection

- Reflect on the four stages of relationship building. Select four relationships that you're currently involved in that would fit into each of the four stages. How are those relationships different? How are you continuing to build and sustain them?

Questions for Group Discussion

- When we think of the four building blocks for relationships (listening, trust, respect, and collaboration), which do we consider to be our greatest strength? Our biggest weakness? Why?
- Consider the fact that all relationships are transactional. What does this mean to us? Do we agree? Disagree? Why?

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