



# Mastering Influence:

Strategies for Leading Without Formal  
Authority

**Leadership** *Potential*



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## Executive Summary

In today's rapidly changing business world, mastering the art of influence without having formal authority has become a crucial skill. This paper is a practical guide for HR and Learning & Development (L&D) leaders, who play a vital role in driving organizational growth beyond traditional training tasks.

This document reveals the key ways to make a real impact. It focuses on three main principles: building strong relationships, being clear on expectations, and aligning with the bigger goals of the company. Each principle offers a way to overcome common challenges, helping to create smoother operations.

This paper also tackles common hurdles like resistance to change and communication issues. It offers smart strategies to overcome these obstacles and increase your ability to influence. By following these practical methods, HR and L&D leaders can expand their roles from an order taker to a strategic advisor - leading their organizations toward greater success.

Even if you're not in HR or L&D, these strategies can help you lead from wherever you are. This guide empowers individuals not only to boost their own careers but also to help their companies thrive and grow.

## Introduction

Building influence and driving change in an organization can be a challenging task, particularly for those without formal authority. As HR and L&D leaders, you are responsible for fostering a culture of growth and development within the organization, ensuring that employees have the necessary skills to drive the organization forward.

In order to successfully build influence and move initiatives forward, there are several key themes that HR and L&D leaders should focus on – including addressing the business needs and looking at the situation holistically, prioritizing authenticity, maintaining clarity about goals and expectations, and building relationships, trust, and social capital.

Staying focused on the business needs and looking at the situation holistically involves understanding the broader context in which the organization operates. This requires taking a strategic approach to identifying and addressing business challenges, rather than simply reacting tactically to individual problems.

Authenticity is essential for building trust and credibility. It allows you to connect with others on a deeper level and build stronger relationships. Authenticity also means being true to yourself and your values, rather than trying to be something or someone you are not.

Building relationships, trust, and social capital is critical for building influence and driving change. HR and L&D leaders need to take a strategic approach to building relationships with stakeholders, identifying key influencers and decision-makers, and building trust and rapport with them. This requires being a valuable resource to stakeholders, understanding their needs and perspectives, and finding common ground and shared interests.

In the following sections, we will dive deeper into each of these themes, providing practical strategies and examples that anybody who needs to drive organizational wide projects and initiatives could use to build influence, gain momentum, and drive change within their organizations. By implementing these strategies, I believe that leaders can not only enhance their effectiveness, but also contribute to the overall success and growth of their organization.

## What is Influence and What are the Barriers?

Imagine you worked at an organization with clearly defined departments and divisions. Now imagine that each department worked within its own “silo” - meaning that nobody collaborated well and communication took way too long travelling up the chain of command, across, and then back down. How would you implement a cross-organizational initiative knowing that everyone was focused on their own priorities?

This is the essence of influence – being able to persuade, inspire, and guide others towards a shared goal or outcome, without relying on formal authority or hierarchical power. Effective influence in the workplace requires an individual to understand the interests, motivations, and values of their colleagues, and to use this understanding to tailor their approach and messaging to achieve the desired outcome.

Influence is especially crucial for individuals who may not have formal leadership roles but still need to accomplish their objectives through others, such as HR professionals, salespeople, project managers, and other stakeholders. These individuals must be able to build relationships and persuade others to take action or adopt new ideas, even if they don't have the authority to command them. In this sense, influence is a key skill for anyone who wants to achieve success in the workplace, regardless of their position or title.

Effective influence in the absence of formal authority faces these 5 main barriers:

1. **Resistance to change:** There may be a lack of support, resistance to feedback, or even cultural barriers and resistance to new ideas. You may also face the perception of being an order taker as well as a very real systemic issue of high turnover and limited time to develop and implement long-term strategies
2. **Lack of resources:** Companies may also face limited access to data and info for decision-making, insufficient buy-in from employees and other departments, and difficulty keeping up with rapid changes in technology and industry standards.
3. **Communication and alignment:** Siloed departments and conflicting priorities can lead to lack of alignment between business objectives and employee development goals. When you don't have formal authority, you also may not have access to all communication channels, making it difficult to get your message across and you usually won't have the power to make key decisions, which can hinder progress on initiatives.
4. **Lack of understanding:** Stakeholders may not fully understand the value of your initiatives, making it difficult to gain their support and buy-in for the value of learning and development initiatives.
5. **Lack of Trust and Credibility:** Without formal authority, it can be difficult to get visibility with key decision-makers and stakeholders, making it harder to influence their decisions.

## How to Build Influence in the Post-Pandemic World

As part of this white paper, I interviewed 12 HR and L&D leaders in various industries in the US for their best practices. 2 CEOs of small, multi-state businesses with track records of influencing customer and employee behaviors in positive ways also participated and shared their secrets. Their responses fell into 3 main pillars:



Strong Relationships, Trust,  
and Social Capital

*“People won’t care what  
you think until they think  
you care.”*



Clear Goals and Expectations

*“What gets measured gets  
managed”*



Think Holistically

*“Don’t miss the forest  
for the trees”*

## Build Relationships, Trust, and Social Capital

The foundation of influence always begins with a good relationship and trust. In an increasingly complex world that HR and L&D professionals, it's vital to be seen as a trusted advisor. The social capital you build can then be used to move initiatives forward.

The foundation is to view your role as customer service. This means having the mindset of identifying and serving the needs of other leaders and departments. It means helping them solve their most pressing issues in a collaborative process. A common theme across industries and roles was the idea that when people know you and know how much you care, the more likely they'll be willing to work with you and do things for you.

Also, recognize that influence is a marathon, not a sprint. Just like managing any other project, maintaining the relationships is an ongoing task. That means:

- ✓ Regularly reaching out to department heads and keeping them informed of progress.
- ✓ Following up on commitments.
- ✓ Managing setbacks collaboratively and calmly.
- ✓ Maintaining positivity and persistence.
- ✓ Calling out the wins
  - If a major milestone is completed, give praise to the senior leaders involved. It's rare for people in higher positions to hear praise and accolades.

How do you achieve this? Follow these well-tested strategies:

### Strategies to get personal:

- Let your personality shine through, be authentic to yourself.
- Share your vulnerabilities/mistakes.
- Show who you are as a human and be genuine.
- Find shared interests and common ground.
- Use an open-door approach, especially if someone is new to the team
  - Explore hobbies, fun activities, family life, what you do on the weekend
  - Share "here's what I can help you with..."
- Make yourself agreeable to them.
- Do little acts of kindness for them:
  - Find what interests them, doesn't have to be expensive
  - Even if virtual, could send them something - articles of things they're interested in
  - Need to make sure it's not a "gift with a price tag"
  - They shouldn't feel like they owe you something – that will have an opposite effect and will annoy them.

### Strategies to maintain consistent rituals and routines

- Hold regular one-on-one meetings with important stakeholders to keep them informed and get to know them.
  - Prioritize regular standing meetings to let them know what you're working on and learn what they're working on.
- If there's resistance/opposition, ask yourself, "how can I get along with this person?" – find any common ground.
- Overcommunicate - have everything in communication and be transparent. This helps demonstrate honesty
- In a virtual world, you don't have an opportunity to run into people in the hallway or in common areas. So, you have to be more mindful and intentional by:
  - Keeping your camera on.
  - Getting to sites physically.
  - Any time there's confusion, reaching out immediately.
  - Asking to join cross-functional meetings or asking, "what do I have that can bring value?"

### Manage your own expectations

- Recognize that you can't win everybody right away.
- Start with departments and leaders who are receptive to new ideas.
- Capitalize on those who are naturally magnetic and can naturally influence.
- Be excited about the task/initiative.
- Follow up with thanks and excitement about how their assistance/work helped the outcome.
- Use a curious and collaborative approach with those who are harder to reach:
  - Create a culture of curiosity – the brain automatically thinks we're right before we think through a problem

As one respondent put it,

*“Make myself someone they want to help or they want to make happy.”*



## Be Clear about Goals and Expectations

Leaders across all organizations and departments are busy. In a time when budgets are getting tighter and people are expected to do increasingly more with increasingly less, everyone is trying to stay above water with their own work. Senior leaders are being pitched to all the time, so their response is to poke holes in what's being pitched.

The clearer you can be about what you need and how your project will benefit someone else, the higher your chances of success.

### Strategies to effectively communicate goals and expectations to department heads:

- Whether you're proposing or need something, keep people informed - invite them to have a say appropriately, but be clear with expectations. If they haven't heard about the decision and feel comfortable with it, they'll feel defensive about it.
- Be clear with what you expect from them so they're not guessing. Do you need feedback? Or just to keep them in the loop? Feedback is always welcome, but it's situationally dependent.
- Try these questions/openers:
  - "I've got a draft about an idea; what do you think about it/what ideas do you have to make it better?"
  - "What would happen if we don't include it?"
  - "What's the risk I'm not seeing?"

### Strategies to gain buy-in from other leaders

- The most common roadblock you'll encounter is "I'm too busy." The challenge for you is to help them see the benefits of that change or initiative by using storytelling principles.
  - Focus on the what and why:
    - Let them know the objectives
    - Let them know resources you'll need.
    - Create clarity on how the goals relate to the vision and company vision.
    - At times, give creative freedom and talk through the other person's suggestions.
- Find common goals/objectives.
  - Talk through both their ideas and yours.
  - Talk with data to back up your position and differentiate between what's subjective vs. objective.
  - Ask questions to assess whether there's something to connect with/relate with.
  - Reflect/summarize to see if you are on point with your summary.
- Take the time to understand what they want.
  - Start by asking questions - telling them what to do won't go very far.
  - Tie what you want to what they want AND tie it to a timeframe.

**Strategies to respond to objections:**

- Understand they'll have objections. To prepare:
  - Think through what they are and have a plan to overcome it
  - Read between the lines and listen to what they're not saying
  - Pushback respectfully by:
    - Be honest with yourself and the other person with what you're trying to do.
    - Showcase what they're going to get out of it by highlight the advantages.
    - Set clear expectations, boundaries and timelines with how long a task will last.
    - Let them know if there are specific priorities they can help with.

As one respondent described it,

*“Be confident in the value that you bring.”*

## Focus on Business Needs and Look at the Situation Holistically

As with everything you do, the projects and tasks should be aligned with helping the organization reach its goals. It should be abundantly clear how your projects and tasks solve the bigger problems. This is the foundation of moving from an order taker to a strategic advisor – demonstrating your ability to think big picture and holistically. That means your initiatives should be outcomes-based from the beginning, not only process focused.

Outside of operations and sales, many other departments struggle to justify how their work leads to concrete business outcomes. This section is much shorter, but the strategies are equally, if not more, important than the other pillars.

### Strategies to be holistic:

- Get familiar with your organization's strategic plan and priorities
  - Ask Senior leaders how you can help move the priorities forward from your division and how you can support other departments in executing that strategic plan.
- Proactively using data and metrics to measure outcomes and success – and clearly defining what success may look like
- Focus on the outcomes, what will be the overall
- Being willing to adapt to the current state of the organization and responding to change initiatives accordingly
  - If needed, be willing to put your own ideas on the backburner to show you are committed to the organization's success.

As one respondent described it,

*“I often ask myself, ‘Would I rather be right or be successful?’”*

## Conclusions

In today's workplace, the art of influence without formal authority has become indispensable. This whitepaper underscores that it's not just about persuasion; it's about forging connections, nurturing trust, and fostering an environment of shared outcomes. Overcoming barriers requires proactive engagement, authenticity, and aligning business goals with human potential.

The themes uncovered here, from aligning with business objectives to cultivating unbreakable relationships, illuminate a path forward. Whether you're in HR, project management, or a leadership role, these principles offer a way forward. Influence is a collaborative symphony of empathy and dedication. By integrating these insights, you possess the power to drive change and shape your organization's future through genuine connections.

I'm Chris Wong, and at Leadership Potential, I work with mission-driven leaders to build highly aligned and engaged cultures so you can have the impact you want.



Contact me at [myleadershippotential@gmail.com](mailto:myleadershippotential@gmail.com) to see how I can help you build your influence and become a true strategic advisor to your organization.



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**I extend my appreciation and gratitude to everyone who participated in this research. Out of respect for their privacy and confidentiality, I will not list them here. Thank you for your invaluable knowledge!**