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The issue and the solution (8 questions)

1 Which person in a decision-making position do you want to attract to the cause that concerns you and the solution you're proposing?

 Be specific: first and last name, position. This is the person who has the power to accept or refuse your proposal.

Make sure your solution corresponds to the decision-making capacity of the person you're trying to attract to your cause.

** See the next section for the analysis of the person you'll be dealing with.*

 In order to attract someone to your cause, you have to know who they are.

You need to make sure the person has the decisional power to agree to your proposal. If not, you may have to decide to approach someone else.

3 What do you want the person you are trying to rally to your cause to agree to? What do you want them to do?

 Clearly identify a precise action or decision, a specific measure or an exact amount of money.

 To keep your objective and desired result clear in your mind.

If you're unclear about what you want, it will be difficult to analyze the person you want to rally to your cause and to define your context and promising strategies.

2 What specific issue/cause do you want to persuade them to support?

 The issue is the need or problem that your solution is going to help solve.

Define your issue at the local, regional or provincial level.

** See questions 1-3 in the Know who you're dealing with section.*

 To identify the key element of your argument.

The person you're trying to attract needs to understand why they should give you their attention.

4 Are the issue and your solution considered urgent or high-priority? Is this a concern shared by several actors in your community?

 Identify the people apart from yourself who consider your issue to be a priority or your solution worth promoting. If you're alone in your corner, before you try to convince a decision-maker, start by mobilizing the people who could be interested in your issue or support your solution. It's always a good idea to present your idea as a group.

** See questions 4 and 5 in the Context section.*

 To give your case credibility.

The solution to a problem that is considered to be serious is of much more interest than a solution to a problem that is of concern to very few people.



5 Is your issue well documented and clearly defined?



If the issue is well-documented, say where.

If it isn't, but considered to be urgent or high-priority and of concern to many other actors, document it yourself (providing information and data on the problem, other pertinent data, reasons why a solution hasn't been implemented or why those that have haven't worked).

** See questions 1 and 2 in the Content section.*



To enhance the credibility of your case.

It's easier to rally someone to your cause if the issue and solution are well documented, supported by figures from reliable sources.

7 If your solution is an innovation, how can you show that it is adapted to the issue and has potential?



Present the points and proven hypotheses on which you based your solution. Be sure to describe in detail the mechanisms that explain how the solution you are proposing will bring about the desired changes. The person you want to rally to your cause must be able to see how your innovation will advance the issue.



To demonstrate the pertinence of your innovative solution in spite of a lack of precedent or documentation.

6 Is your solution clearly defined?

- Effective?
- Realistic?
- Adapted?
- Tested?
- Documented?



Keep these points in mind to use as a checklist when developing your influence communication or presentation strategy. These points need to be included when you present your case.

** See questions 3 and 9 in the Know who you're dealing with section.*



To strengthen your case and add credibility to your influence strategy.

These are the indicators that the person you are trying to persuade will use to analyze your request.

8 Why are you (as an actor or representative of an organization) presenting this proposal and not some other actor from your sector?



You need to show that you and your organization are qualified to share your idea with the person who will be able to influence the person you are trying to rally to your cause, as they may become the new person you have to persuade.

** See question 11 in the Know who you're dealing with section.*



To give your case credibility.

Know who you're dealing with (12 questions)

1 What is the connection between the interests of the person you are trying to persuade and your issue or solution?



Identify the priorities and values of the person you are trying to persuade that will ensure their interest in the issue and proposed solution.

** See question 3 in both the Issue section and the Know who you're dealing with section.*



To establish a connection between the interests of the person you are trying to persuade and the solution included in your proposal.

3 How do the issue and your solution fit into the professional and personal motivations and objectives of the person you are trying to persuade?



Learn more about their orientations, strategic planning, action plans, etc., or talk to someone in the know.

Try to find out more about the values and motivations of the person you are trying to rally to your cause.

** See question 4 in the Issue section and questions 1, 5 and 6 in the Know who you're dealing with section.*



To present the issue in a favourable light and show how your solution ties in with the personal and professional motivations of the person you are trying to attract to your cause.

2 What is the latest position of this person (or their organization) on the issue or your solution?



Consult social networks and traditional media sources. Search the Internet and the organization's website. Even if the organization has taken a certain position, the person you are trying to persuade may not necessarily agree with that position, and might be more favourable to your solution than you think.



To determine the possible level of support and whether you will need to work on changing the way the person you are trying to persuade sees the issue before presenting your proposal.

4 Do you think the person you are trying to win over is more attracted to innovative solutions or tried-and-tested solutions?



Point out the innovative elements of a proven solution or, inversely, focus on the elements of your hypothesis that are based on facts and hard data.

** See questions 4, 5 and 6 in the Issue section and questions 3 and 9 in the Know who you're dealing with section.*



To ensure your solution isn't dismissed out of hand because of this single criterion, and to refer to it when presenting your case.



5 Why would this person say YES?

 Identify their personal, professional and organizational motivations as well as their obligations.

** See questions 1, 2 and 3 in the Know who you're dealing with section and questions 4 and 6 in the Issue section.*

 To establish positive connections that you'll be able to use when presenting your case and highlight in your communications.

7 Why would this person say NO?

 Think about their financial capacity, time, values and priorities. Prepare answers to counter any possible arguments against your solution.

Use examples of local and human impact to support your answers.

Identify the resources, interests and priorities of the person you are trying to persuade. Examine your relationship with them and how much credibility you have in their eyes. Identify obstacles, threats and challenges. Is this your first request?

** See questions 1-6 in the Know who you're dealing with section and question 4 in the Issue section.*

 To find concrete solutions to obstacles or modify perceptions if necessary.

6 Who has this person said YES to recently?

 You need to have an idea of this person's recent decisions and the budgets they have approved so that you can determine whether what you're asking for is within the bounds of what is usually asked for, or whether your request goes beyond that.

** See question 4 in the Context section and questions 2 in the Know who you're dealing with section.*

 To determine whether your solution is realistic or whether it falls outside the usual framework.

8 Who has influence over the person you are trying to attract to your cause?

 Every decision-maker consults at least five people before making a final decision. Try to find out who those people are.

** See question 7 in the Context section and question 4 in the Strategy section.*

 To ensure you mention those allies in your messages.

To make them messengers who will pass your message on and distribute it on social media. To establish partnerships and enhance the credibility of your message.

Know who you're dealing with (12 questions)



9 Has your solution been adopted by another leader in the same activity sector?

 In the same region or elsewhere in Quebec? Identify a person who has credibility in the eyes of the person you are trying to persuade. Find out who has already adopted—in full or in part—the solution you're proposing.

** See question 3 in the Context section.*

 To enhance the credibility of your solution by citing the support of a peer who has credibility in the eyes of the person you are trying to rally to your cause.

11 What does the person you are trying to enlist to your cause think about your organization or your partners?

 Talk about your values, your mission, your credibility and your posture and show how they connect with those you've documented for the person you are trying to persuade.

** See question 8 in the Issue section and question 4 in the Context section.*

 To determine how to communicate your know-how and credibility if necessary.

10 If you are trying to gain the support of several different people, which of them would be most likely to say YES?

 Break your group down: 1- very receptive, 2- receptive with reservations, 3- doesn't understand, and 4- serious reservations.

Make rapid gains in the first two categories and ensure their support is visible to the others. Then go to work on those in categories 3 and 4.

 To better organize your priorities and develop approaches that are adapted to the receptivity of your interlocutor.

12 Through what channels, activities or events can you reach the person you are trying to persuade?

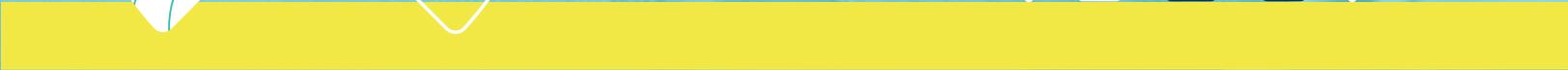
 You will probably need a combination of activities and channels to reach the person and get your message across.

** See question 5 in the Strategy section.*

 To decide how to reach out to the person you are trying to attract to your cause and transmit your messages.



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Context (8 questions)

1 What is working in your favour in the current social Context? Is this the right time?



Identify the opportunities in this Context and the elements working in your favour within your organization. Take all aspects into account: territorial, sectoral, organizational, political, economic, regulatory, etc.

** See questions 4 and 6 in the Issue section and question 3 in the Know who you're dealing with section.*



To determine how to make the most of what's working in your favour.

These elements are invaluable for overcoming obstacles, challenges and threats.

3 Is there anyone in your community who is proposing a similar solution?



Identify the possibilities of forming a partnership or coalition.

Identify obstacles, threats and competitors.

Be ready to provide evidence of popularity of your solution.

** See question 6 in the Know who you're dealing with section.*



To make adjustments to your calendar or highlight what distinguishes your solution from the others.

Highlight your unique value and explain "why you." You could also consider joining forces with this partner on their project.

2 What could work against you?



Identify any obstacles, threats and challenges. Take the social Context into account, as well as any elements that could work against you from within your organization. Also take into account all territorial, sectoral, organizational, political, economic, regulatory, etc. aspects.

** See questions 7 in the Know who you're dealing with section and question 3 in the Strategy section.*



To take these elements into account and determine how to limit their effects.

4 Is anyone currently talking about this issue or your solution in the media?



Identify opportunities to intervene in traditional or social media and mobilize other partners. This will also create a Context that is more favourable to obtaining the agreement of the person you are trying to rally to your cause.

If your issue or solution isn't currently in the media, make it happen. For example, reveal the results of a survey on what citizens think about your issue, or those of another study. Choose your moment carefully.

** See question 4 in the Issue section.*



To take part in a media debate (in the form of an open letter, news release, etc.) to attract attention to your issue and play up your solution.



5 What do the population and the media think about the issue or your solution?

 Identify opportunities, obstacles, threats or challenges. Decide whether a public communication strategy is called for. Using the media to reach out to citizens or groups of citizens is an effective means of communication, reaching the person you are trying to persuade at the same time.

** See question 4 in the Context section and question 4 in the Issue section.*

 To enhance the social desirability of the solution you're proposing.
Finding out what people think can also help you fine-tune your argument.

7 Which partners could improve your credibility with the person you are trying to win over?

 Which partners could improve your credibility with the person you are trying to win over?

Define the role that those partners will play in your strategy.

** See question 8 in the Know who you're dealing with section and question 4 in the Strategy section.*

 To add credibility to your argument and implement your solution.

6 Who is downplaying your issue and opposing your solution?

 Try to discuss the issue with your critics: a discussion can often resolve reservations or help you more clearly define your position.

 To obtain information on positions opposing your solution and attenuate the effects of those positions on your case..

8 Does your entire organization or association have the same understanding of your objectives and the limits of your influence communication?

 All the members of your association (or its governance) should be familiar with your objectives and support them. You should know when you need to go back and consult them in the Context of your strategy of influence.

 To be able to confidently implement your influence communication without creating any internal conflict and to take advantage of opportunities that arise without questioning your legitimacy.

Strategy (6 questions)

1 What are you going to use to describe and present the issue?

 Include data, stories and narratives, depending on what will best reach the person you want to win over. Make sure your data is accessible, easy to understand and meaningful to the general public.

** See questions 1 and 4 in the Know who you're dealing with section.*

 To play up your supporting information on the issue or highlight your solution in your communications.

The person you are trying to persuade has to recognize the importance of the issue before they can support the solution.

3 How do you plan to respond to obstacles, threats, challenges and criticism?

 Plan for ways to reduce or eliminate obstacles, threats and challenges.

** See questions 8 in the Know who you're dealing with section and questions 1 and 2 in the Context section.*

 To set up measures aimed at attenuating obstacles, threat and challenges.

2 How do you plan to describe and present your solution?

 Do everything you can to make your solution attractive, effective, simple and practical.

Talk to your audience's head, heart and pocketbook.

** See questions 1 and 4 of the Know who you're dealing with section.*

 To position the issue and solution effectively and make them the key elements of your case and your message.

4 Who could accompany you to help promote your solution?

 Try to identify who would have the most credibility in the eyes of the person you are trying to rally to your cause. Another person or partner may be better placed to connect with the person you want to convince.

** See question 9 in the Know who you're dealing with section and question 7 in the Context section.*

 To demonstrate support for your process and the desirability of your solution.

To enhance the credibility of your communication strategy.



5 What channels will allow you to reach the person you are trying to attract to your cause?

 Plan for your message being heard between three and seven times through various channels: medias, events and interpersonal.

** See question 12 in the Know who you're dealing with section.*

 To target the different means by which you plan to reach the person you are trying to persuade based on your previous analysis.

6 What will you do if, in spite of all your efforts, you get a negative response?

 A negative response will give you an opportunity to learn more about the person you are trying to persuade and their context and to use that information in future interventions. You could also look into possible compromises.

** See question 3 in the Learning (strategy) section.*

 To react promptly in order to gain some ground even if your strategy doesn't work.

Content and messages (7 questions)

1 Who can help you document the issue and your solution?

 If the answers can't be found within your organization, try talking to a person or an organization that is very familiar with the subject.

** See question 2 in the Content section.*

 To better document your strategy and make it more credible through the use of data and facts.

3 What will be your key messages, expressed in simple language aimed at the person you want to convince?

 Focus on the initial need (issue) and the response to that need (solution).

Use your strengths, opportunities, motivations and obligations to determine the unique, credible, special and sustainable space you will occupy in people's minds, and present them clearly and concisely (no longer than a page).

Use the vocabulary of the person you are trying to convince, not yours. Use the words they would use, and borrow their definitions and concepts.

** See the Know who you're dealing with section.*

 To make sure the person you want to convince fully understands your message so that they can clearly express it to the people to whom they will have to justify their decision to say "yes."

To position the issue and the solution effectively, making them the key elements of your case and your message.

2 Who is the most recognized expert on your issue or solution?

 This person could direct you to data or narratives, or they could provide you with a narrative of their own. They could talk about the issue or your solution to the media.

** See question 1 in the Content section.*

 To bolster the credibility of your strategy through the support of an outside resource who has credibility in the eyes of the person you are trying to rally to your cause.

4 Have you pre-tested your message?

 Apart from a general pre-test of your message (to make sure it can be easily understood), you can also pre-test it with people whose profile is as similar as possible to that of the person you are trying to persuade or someone who knows that person well.

 To make sure your message is clearly understood and has an impact. Reduce the possibilities of communication misinterpretation or backlash.



5 Have you developed a means of communicating your message to the person you want to rally to your cause?

 Use the elements from your analysis of the person you are trying to persuade and your strategy. Identify what that person does, the resources they consult, what they care about. Your means and style of communication should reflect your answers to those questions.

** See the Know who you're dealing with section.*

 To use different means to convey your message in order to have an optimal effect on the person you are trying to convince.

7 On the subject of oral presentations, have you prepared a good lead to capture the interest of your audience?

 Start your presentation off with some surprising data, image, story, statement or question. That element can be also be used in your oral presentations and highlighted in your written documents.

** See question 3 in the Content section.*

 To give your communications maximum impact.

6 If you will be doing oral presentations, have you planned your content based on the amount of time you will have?

 It is important that you respect the amount of time allotted for your presentations. It shows the person you are trying to persuade that you respect their reality.

If you plan to use presentation software, allow for one minute per slide.

 To make sure you make the best use of the time available to you for your oral presentation and reassure the person you are trying to convince.

Resources (2 questions)



1 Do you have the necessary time, expertise, processes, budget and access to resources and networks to set up your strategy of influence?



Look at the elements of your strategy and at what you will need to do to implement your influence communication strategy in order to reach the person you are trying to rally to your cause. How can you transmit a message that will have a real impact on them?

You don't always need a lot of resources to attract someone to your cause.

If your resources are limited, look into the possibility of seeing which of your partners could get involved in the process.

** See your Context analysis.*



To make sure that you are truly able to implement your strategy of influence based on your planning.

2 Will you need to call on employees, volunteers or outside suppliers to help you realize your strategy of influence?



Consider media and public relations, development of communication tools, compiling information on the issue and the solution, presentations, etc.



To make sure you are capable of implementing your strategy of influence by planning to make good use of the right resources at the right times.

Relationships (3 questions)



1 What could you do to establish a more permanent relationship with the person you are trying to persuade, especially if you will be asking for their support more than once over the next few years?

 Participate in events that the person attends, respond to offers from them and react to their interventions on social media.

** See question 12 in the Know who you're dealing with section, question 7 in the Context section, question 5 in the Strategy section and question 2 in the Relationships section.*

 To evaluate whether you need to increase your visibility with the person you are trying to rally to your cause. Knowing if you want to establish an ongoing relationship with that person will also enable you to better determine the resources and level of engagement you will need to engage them. Also, if you think it's strategic, you'll have to integrate this idea of permanence into all your communications with this person.

3 Do you know any influential people in the circle of the person you are trying to persuade who could give you access to them, show support for the solution you're proposing, or otherwise support you in advancing your strategy?

 An objective, uninvolved person will have more credibility in the eyes of the person you are trying to attract.

** See question 8 in the Know who you're dealing with section and question 7 in the Context section.*

 To use your current contacts to make new ones and gain credibility. To increase support for your solution or your organization.

2 How could you show your interest in the projects of the person you are trying to persuade?

 Show the person that you are interested in them (for example, by subscribing to their organization's newsletter, following them in the media and on social media, by attending their events and participating in their consultation calls). This will encourage their interest in you.

** See question 1 in the Relationship section, question 12 in the Know who you're dealing with section, question 7 in the Context section and question 5 in the Strategy section.*

 To include links to their activities in your communications with them so that they will feel that you are really interested in them and in their priorities.

Plan to go to the events they attend and be on the lookout for opportunities to do so.

Media (6 questions)

1 Do you think it would be useful to get the media talking about the issue, your solution or your organization, or do you think it would do more harm than good?



Your issue: bring it to people's attention, talk about its importance and urgency.

Your solution: make people aware of it to make it credible.

You: get people talking about you to enhance your credibility.

If a media presence could actually do you more harm than good, however, you'll need to rethink your strategy.

** See question 4 in the Issue section, questions 2 and 12 in the Know who you're dealing with section and questions 4 and 5 in the Context section.*



To work on issue recognition and the desirability of your solution.

To gain the support of the general public and your partners.

3 In your region or community, which media personalities (journalists, columnists, talk show hosts, bloggers and influencers) are talking about your cause, your issue?



Consider all forms of media: print, radio, Internet, etc. Start by focusing on the media that has the greatest impact on the person you hope to rally to your cause.

** See questions 4 and 5 in the Context section.*



To decide which media you need to initiate a relationship with.



Comments



Why it's important?

2 What types of media have the most powerful impact on the person you are trying to persuade?



Identify which media the person finds most credible and which they are most often exposed to.

** See question 12 of the Know who you're dealing with section and question 5 in the Content section.*



To identify which media channels to target.

4 Are you familiar with the communication styles of the various media, in what form they prefer their information (focused on data, controversy, stories, heroes)?



Try to present the different media with content created especially for them so that they can relay the information in the style they prefer.



To adapt your content to different journalistic styles.



5 What is the best way to solicit these media?

 Decide whether you want to grant exclusivity to one source or talk about the subject to several of them. Familiarize yourself with the relationships between the various media.

 To determine your media approach.

6 How can you be useful to the media?

 Show them that you're able to give them the information they need. Pass on their information that is related to your mission, distribute their columns, etc. Agree to collaborate on articles when asked.

Request meetings with columnists and editorialists to bring your issue to their attention so that they'll talk about it. Tie in your issue with current news items.

 To develop relationships based on mutual interests.

Strategy (3 questions)



1 What evaluation framework do you plan to use to determine whether you have achieved the objectives of your communication of influence?

 An evaluation plan will improve the likelihood of your taking the time to examine your strategy.

Your framework can be concise (1 or 2 indicators), but a more expanded format will provide you with more opportunities for learning.

 To plan your learning objectives and how to compile the information you need.

To make adjustments as needed.

3 Did you achieve your objectives? In part? Not at all? Why/why not? What did you learn?

 Be ready to provide an account of your strategy to your partners, financial partners, etc.

 To promote ongoing learning and sharing.

2 How and when do you plan to document your progress in achieving the objectives of your communication of influence?

 Make a timeline. You may find it interesting to analyze your strategy's progress in real time.

 To make mid-stream adjustments and better plan future strategies.

Effects of the solution (3 questions)



1 Have you planned how to determine whether your solution has actually been implemented?

 Be ready to talk about the progress of your solution with your partners, funders, etc.

** See your solution.*

 To make sure your solution goes beyond the “yes” you obtained in response to your call to action.

3 How and when do you plan to follow up the outcome of your solution?

 Make a timeline. You may find it interesting to analyze the progress of your solution in real time.

 To determine a schedule and methodology for capturing the effects of your solution on the issue.

To plan new strategies of influence in order to adjust the solution if changes have occurred during its implementation that could compromise its effectiveness.

2 Have you thought about how to compile how your solution affects the issue?

 Try to identify what you could measure that would enable you to know whether your solution has had the desired effect(s). If necessary, use the services of a specialized, competent evaluation resource to formulate learning and evaluation questions.

** See question 1 in the Resources section and questions 6 and 7 in the Issue and solutions section.*

 To enhance the credibility of your future presentations and adjust your future strategies.



**We are always happy
to hear from you!**

Email us at info@pourrallier.com

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