



HUMAN SKILLS EDITION

The Action Guide

40 actions to get your ideas heard, valued and acted on when the decision matters.

Four capabilities · ten actions each

- Know your audience
- Emotional intelligence
- Decision discernment
- Decision influence



How to use this guide

Each action is a small, specific move you can make in your next meeting. They're grouped by the four capabilities behind influence. Together they form an influence loop: read the room, steady yourself, test the thinking, then land the decision.

STEP: READ

Know your audience

Understand what they're deciding, what it costs them, and what they already understand.

STEP: STEADY

Emotional intelligence

Manage the signal you send and read the one you're getting, especially when it stings.

STEP: TEST

Decision discernment

Spot shaky evidence, hidden assumptions, bias, false choices, and missing alternatives.

STEP: LAND

Decision influence

Turn sound analysis into a clear, credible recommendation someone can act on.

Tip: pick one action a week. Try it, notice what changes, then add another.

ACTIONS 1–10 · STEP: READ

Know your audience

Understand what they're deciding, what it costs them, and what they already understand.

What they're deciding and what yes costs them

1. Name the real question
2. Map the stakes
3. Speak in their currency
4. Find the comparison that travels
5. Answer the question above them
6. Show enough of the iceberg
7. Choose the right channel
8. Agree on the problem first
9. Learn how they decide
10. Ask before you pitch

1 Name the real question

A brilliant answer to the wrong question still loses.

Most arguments stall because people are debating different things: whether the idea is right, whether the timing is right, or whether it's even their problem. Until someone names the actual decision, the conversation generates heat without light.

SAY

“Before we go further, can we agree on what we're actually deciding today?”

Use when: A discussion keeps circling, or you're about to build a case.

2 Map the stakes

People weigh what yes will cost them, not just what your idea is worth.

Every yes has a price for the person saying it: budget, workload, reputation, a promise made to their boss, or the memory of what happened last time. When you can see that price, you can address it instead of arguing past it.

ASK YOURSELF

“If they say yes, what might they lose, what are they measured on, and what happened last time?”

Use when: You need someone's support, especially someone above or beside you.

3 Speak in their currency

Your case has to land in their terms, not yours.

Experts tend to argue in the currency of their discipline: accuracy, rigor, risk. The finance director counts dollars, the operations lead counts hours, and the elected official counts constituents. Translate, and use honest ranges instead of false precision.

SAY

“In terms of your budget, this is roughly \$40,000 to \$60,000 over two years, and here's what drives the low and high end.”

Use when: The decision-maker's background is different from yours.

4 Find the comparison that travels

What you set an idea beside decides whether it's remembered.

An accurate number gives people something to hold. A good comparison gives them something to repeat. The test isn't cleverness. It's whether someone can pass it on two days later without their notes.

SAY

“The whole request is less than we spend on printer paper in a year.”

Use when: You're explaining scale, risk, or something unfamiliar.

5

Answer the question above them

Decision-makers need an answer they can defend.

The person you're persuading will have to explain the decision to someone else: their boss, a board, the public, or their team. Hand them a one-sentence answer to that next question and approval gets much easier.

SAY

“If the board asks why we're not waiting for the full study, the short answer is that the pilot tells us the same thing three months sooner.”

Use when: You're recommending something to a person who reports upward.

6

Show enough of the iceberg

More detail doesn't always build more trust.

Too little and people doubt your judgment. Too much and they can't find it. Lead with your claim, your strongest evidence, and the link between them, and keep everything else below the waterline until someone asks.

ASK YOURSELF

“Would more detail help them trust my judgment, or make it harder to see?”

Use when: You're preparing a briefing, memo, or presentation.

7

Choose the right channel

The same argument lands differently in an email, a deck, and a hallway.

Most email readers stop after the first paragraph or two, so the ask goes first. Slides should answer one question each. A one-on-one is the only format that lets you think out loud together, which makes it the best place for early or sensitive ideas.

ASK YOURSELF

“Where will this person actually give it their full attention?”

Use when: You're deciding how, not just whether, to raise something.

8

Agree on the problem first

A solution sounds like a cost until people see the problem.

If your audience doesn't yet believe something needs to change, your proposal registers as disruption. Build agreement that the current situation isn't working, then propose the fix.

SAY

“Before I get to options, can we agree on what isn't working right now?”

Use when: You're proposing change to people comfortable with the status quo.

9 Learn how they decide

Some people decide with data, some with stories, some with allies.

Look at how this person has said yes before. Was it after the numbers, after a pilot, or after a trusted peer weighed in? Bring them what they actually use to decide, not what you'd use.

ASK YOURSELF

“How did they make the last decision like this one?”

Use when: You're influencing someone you haven't worked with closely.

10 Ask before you pitch

The best audience research is a good question.

People support what they help shape. Asking what would make an idea work from their side gives you information you can't get any other way, and it gives them a stake in the outcome before you've asked for anything.

SAY

“What would make this work from where you sit?”

Use when: Early, before your recommendation is set in stone.

ACTIONS 11–20 · STEP: STEADY

Emotional intelligence

Manage the signal you send and read the one you're getting, especially when it stings.

The signal you'll choose to send

11. Name the charge
12. Audit your expert tells
13. Take the two-beat reset
14. Build, don't accuse
15. Listen for the objection beneath the objection
16. Say the care part first
17. Read the room before you speak
18. Lower the cost of changing course
19. Stay curious when challenged
20. Repair quickly

11

Name the charge

People read your signal before they hear your substance.

When you care about an issue, the emotion you're carrying leaks into your tone, pace, and face. Naming it silently, in one word, gives you a moment to choose a different signal instead of broadcasting the one you walked in with.

ASK YOURSELF

“What's the one word for what I'm feeling, and what will it look like to them?”

Use when: Before any conversation you care about.

12

Audit your expert tells

Expertise can leak out as impatience or certainty.

Sighing at a basic question, correcting small errors in public, and answering before the question is finished all send a signal you didn't mean to send. Identify your two to four tells, then ask a colleague you trust whether they see them too.

ASK YOURSELF

“What do I do when I think someone's wrong, and what does it look like from the outside?”

Use when: You've been called intense, hard to approach, or hard to read.

13 Take the two-beat reset

The moment after it stings decides what happens next.

When you feel overlooked or dismissed, your first reaction is usually the one that costs you. One slow breath buys you the first beat. A question buys you the second.

ASK YOURSELF

“What does this moment make possible?”

Use when: You feel dismissed, overlooked, or talked over.

14 Build, don't accuse

When your idea resurfaces through someone else, build on it.

"That was my idea" makes you the story. Connecting their point to what you said earlier, then adding the next step only you could add, keeps the idea moving and clearly linked to you. Follow up in writing afterward.

SAY

“Building on the point from earlier, the next step would be a two-office pilot.”

Use when: Someone repeats your idea and gets the credit.

15 Listen for the objection beneath the objection

The stated reason often isn't the real one.

"It's not in the budget" or "The timing isn't right" can end a conversation without explaining it. The real concern might be workload, credit, risk, or a bad experience with a similar idea. Name what you think is underneath, tentatively, and let them correct you.

SAY

"I might be wrong, but it sounds like the bigger worry might be the staffing load. Is that close?"

Use when: You hear a closed-door objection like "not now."

16 Say the care part first

People can only hear a challenge once they know you're on their side.

Before you challenge someone's work, say what's true: you see the effort, and you want it to succeed. Then deliver the concern. It takes ten seconds and changes how everything after it is heard.

SAY

"You've clearly put real work into this, and I want it to succeed. Can I raise one thing?"

Use when: You're about to challenge someone's work or plan.

17

Read the room before you speak

The same point lands differently in a tired room and a fresh one.

Notice the energy, who's gone quiet, and who has already decided. Sometimes the room needs a question. Sometimes it needs a clear recommendation. And sometimes the best move is to save your point for a one-on-one.

ASK YOURSELF

“Does this room need my point now, or later, and in what form?”

Use when: Tension, fatigue, or a strong opinion is already in the room.

18

Lower the cost of changing course

People defend positions they've taken in public.

Offer your point as new information rather than a missed step, so the other person can adjust without admitting they got it wrong. An exit ramp is often the difference between an idea being absorbed and being fought.

SAY

“Something may have changed since this was drafted. The data team just picked up the audit project.”

Use when: The presenter has already committed to a plan publicly.

19

Stay curious when challenged

Defensiveness reads as weakness. Curiosity reads as confidence.

When your idea is attacked, asking about the objection buys you time and often shows it's smaller than it first sounded. It also signals that you're secure enough in your thinking to examine it in public.

SAY

“Say more about that. Which part worries you most?”

Use when: Someone pushes back hard on your proposal.

20

Repair quickly

A sharp moment left alone turns into a reputation.

If you came in too hot, a short, specific repair within a day restores more trust than a long apology later. Own the tone, keep the substance, and reopen the conversation.

SAY

“I pushed harder than I meant to yesterday. The concern still stands, but my tone didn't help. Can we look at it again?”

Use when: A conversation went badly and you contributed to it.

ACTIONS 21–30 · STEP: TEST

Decision discernment

Spot shaky evidence, hidden assumptions, bias, false choices, and missing alternatives.

The weak spot to test or name

21. Sort the claims
22. Run the warrant check
23. Ask "compared to what?"
24. Check the track record
25. Be suspicious of precision
26. Test the arguments you like hardest
27. Look for the missing option
28. Check your examples
29. Separate cause from coincidence
30. Check polished work, including AI

21 Sort the claims

Facts, forecasts, and assumptions often wear the same confident tone.

"Enrollment grew 12%" is a fact. "Enrollment will grow 12%" is a forecast. "Once it grows, we'll need two more staff" is an assumption stacked on top. Plans often go wrong where a forecast has quietly become a fact by page twelve.

ASK YOURSELF

"Which of these claims has happened, which is a prediction, and which is simply assumed?"

Use when: You're reviewing a proposal, forecast, or business case.

22 Run the warrant check

The weak spot is usually in the link, not the evidence.

Every argument has a claim, evidence, and an unstated assumption that connects them. That hidden link, the warrant, is where arguments are most vulnerable. Find it before the meeting does, then support it or name it openly.

ASK YOURSELF

"What must be true for this evidence to support this conclusion, and would everyone in the room accept that?"

Use when: Before you present, and when you evaluate someone else's case.

23 Ask "compared to what?"

A number means little until you know what it's compared to.

"Complaints fell 30%" matters only if they didn't fall everywhere else too. Before/after results, success rates, and single impressive figures all need a comparison before they mean anything.

SAY

"That's a strong number. What did it look like at the sites that didn't make the change?"

Use when: Someone presents a result or a success rate.

24 Check the track record

Plans are optimistic. History is less so.

Instead of judging a plan by its own logic, check it against how similar efforts actually turned out. In Bent Flyvbjerg's database of more than 16,000 projects, only about 8.5% were delivered on budget and on time.

SAY

"When we've done something like this before, how long did it actually take?"

Use when: Someone presents a timeline, budget, or forecast.

25 Be suspicious of precision

The more precise a number looks, the more it deserves a second look.

Precise figures feel more credible and anchor people more strongly than round ones (Janiszewski and Uy, 2008). But "\$4.37 million in savings" is still an estimate. Asking for a range shows you quickly how solid it really is.

SAY

"What's the realistic range on that? What would the low end look like?"

Use when: A forecast arrives with decimal places.

26 Test the arguments you like hardest

The claims you want to be true get the lightest check.

Research by Dan Kahn and colleagues found that people with strong quantitative skills weren't more accurate when data challenged their views. They were better at explaining it away. Expertise can give you better tools for motivated reasoning.

ASK YOURSELF

"Would I accept this evidence if it pointed the other way?"

Use when: A conclusion supports what you already believe.

27 Look for the missing option

Either/or choices are often incomplete.

"Cut the program or lose the budget line." Two-option framings force decisions, and they often leave out the smaller version, the phased version, a delay with a clear trigger, or a partner who shares the risk.

SAY

"Before we choose between these two, is there a phased version we've ruled out, and why?"

Use when: A decision is framed as a choice between two options.

28 Check your examples

Three good cases aren't a pattern.

Reasoning from examples is persuasive and fragile. It breaks when the examples aren't typical, when there aren't enough of them, or when there are exceptions nobody mentioned.

ASK YOURSELF

"Are these examples enough, are they typical, and what exceptions have we ignored?"

Use when: A recommendation rests on a handful of success stories.

29

Separate cause from coincidence

Things that happen together don't always cause each other.

The office that adopted the new process also got a new manager and two extra staff. Before you credit a result to one change, ask what else changed at the same time.

SAY

“What else changed during that period that could explain the result?”

Use when: A result is credited to a single change.

30

Check polished work, including AI

Polish is not evidence.

Consultant decks, vendor reports, and AI summaries can be fluent, specific, and wrong. Pick the two or three figures the conclusion depends on most and trace each one to its original source. If one fails, treat the whole document as a draft.

ASK YOURSELF

“Which two or three numbers does this conclusion depend on, and where did each one come from?”

Use when: A polished report or AI output lands before a decision.

ACTIONS 31–40 · STEP: LAND

Decision influence

Turn sound analysis into a clear, credible recommendation someone can act on.

The recommendation and the ask

- 31. Lead with the decision
- 32. Cut your weaker reasons
- 33. Offer options, then recommend one
- 34. Put a number on "likely"
- 35. Name one uncertainty and how you'd manage it
- 36. Pre-wire the decision
- 37. Build the rebuttal in
- 38. Separate the concern from the verdict
- 39. Mark the edge of what you know
- 40. Close the loop visibly

31 Lead with the decision

Say what you want decided in the first sixty seconds.

Experts present in the order they did the work. Decision-makers listen in the opposite order. Give them the recommendation, the reason, the cost of waiting, and the ask, then hold the detail until they pull on it.

SAY

“I recommend we move intake online. It cuts response time roughly in half. Waiting another quarter means another backlog. Can I have approval to pilot it in May?”

Use when: You need a decision, especially from someone senior or busy.

32 Cut your weaker reasons

Adding reasons can make your case weaker.

Psychologists call it the dilution effect: when strong evidence is mixed with weak points, listeners give the strong evidence less weight. They average your reasons rather than add them up. Lead with the one that matters most to this audience.

ASK YOURSELF

“If I could give only one reason, which one would move this person?”

Use when: You have one strong reason and several modest ones.

33 Offer options, then recommend one

Options respect their authority. A recommendation shows your judgment.

A single recommendation can feel like a rubber stamp. Options without a recommendation leave them doing your job. Lay out two or three real paths, including a smaller version, then say which one you'd choose and why.

SAY

“There are three realistic paths. I recommend the pilot, because it gets us most of the benefit and lets us fix problems before scaling.”

Use when: You're recommending something to a senior decision-maker.

34 Put a number on "likely"

Probability words mean very different things to different people.

When Andrew and Michael Mauboussin asked about 1,700 people to put numbers on common probability words, the middle 90% of answers for "likely" ran from 55% to 90%. When a decision depends on how likely something is, give a number or a range.

SAY

“I'd put the chance of hitting the May date at about 70%.”

Use when: Your recommendation depends on a risk or a forecast.

35 Name one uncertainty and how you'd manage it

Clear uncertainty builds credibility. Vague uncertainty erodes it.

Listing every caveat sounds like "I don't know." Hiding uncertainty works until it surfaces. Research by Celia Gaertig and Joseph Simmons found people judged unsure advisors harshly but didn't penalize advice for acknowledging real uncertainty.

SAY

"The biggest unknown is staff adoption. I'd manage that with a 60-day check, and we'll know by July."

Use when: You're recommending something with real uncertainty.

36 Pre-wire the decision

Most decisions are shaped before the meeting starts.

Talk one-on-one with the two to four people whose reactions will shape the room. You'll hear concerns early, adjust, and walk in without surprises. The goal is to listen, not to lobby.

SAY

"Before Thursday, I wanted to get your read on this. What would make it work from where you sit?"

Use when: A decision matters and involves several stakeholders.

37 Build the rebuttal in

Name where you might be wrong before someone else does.

Saying "here's where this might break" shows you've examined your own thinking. It tends to make people trust your conclusion more. Then invite challenge with a specific question instead of "any questions?"

SAY

"The strongest objection is the rollout timeline. Here's how I'd handle it. Where do you think this is most likely to break?"

Use when: You're presenting to a skeptical or senior audience.

38 Separate the concern from the verdict

Raise the risk without condemning the plan.

"This won't work" is a verdict, and people defend themselves against verdicts. Say what you're not saying, name the specific risk, name what would resolve it, and invite their solution.

SAY

"I'm not saying we shouldn't do this. My concern is the March date. With a two-week buffer, I'd be fully behind it. What would work from your side?"

Use when: You think a plan is flawed, especially one someone else owns.

39

Mark the edge of what you know

Credibility comes from being accurate about where your knowledge stops.

The subtle failure isn't bluffing. It's smoothly answering a slightly different question you can answer. Say what you know, mark exactly where it stops, and attach a plan and a date.

SAY

"I can tell you how we handled this the last two cycles. I don't know yet whether the new rules change that. I'll have an answer by Thursday."

Use when: You get a question you can't fully answer.

40

Close the loop visibly

Follow-through is what turns a good meeting into a decision.

Summarize what was agreed before everyone leaves, send a short written record within a day, and report back on what happened with people's input. Whoever writes the summary often shapes how the decision is remembered.

SAY

"Here's what I heard us agree to, what I'll do by Friday, and when I'll check back."

Use when: The end of any meeting where something was decided.

Quick reference: all 40 actions

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- 3 Speak in their currency
- 4 Find the comparison that travels
- 5 Answer the question above them
- 6 Show enough of the iceberg
- 7 Choose the right channel
- 8 Agree on the problem first
- 9 Learn how they decide
- 10 Ask before you pitch

Decision discernment

- 21 Sort the claims
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- 23 Ask "compared to what?"
- 24 Check the track record
- 25 Be suspicious of precision
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- 30 Check polished work, including AI

Emotional intelligence

- 11 Name the charge
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- 14 Build, don't accuse
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Decision influence

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- 39 Mark the edge of what you know
- 40 Close the loop visibly

Keep going

Practise with the AI coach and loop builder

<https://fortyactions.lovable.app>

Take the Expert Influence Scorecard

<https://hse-expertinfluencegap.scoreapp.com>



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