

Selling Audit Ideas & Influencing Management Action

Session W-301

The Conference That Counts
May 24, 2023

John J. Hall, CPA

John@JohnHallSpeaker.com

[\(312\)560-9931](tel:(312)560-9931)

www.JohnHallSpeaker.com

Intention



Transition Experience

PRIOR
RESULTS →

INTERACTION →

BETTER
RESULTS

Transition Experience

PRIOR
RESULTS →

AUDIT →

BETTER
RESULTS

The Closing Meeting

The Story of **FRUSTRATED FRAN**

Contract Monitoring



Orvel Ray Wilson, CSP, CEC · 1st

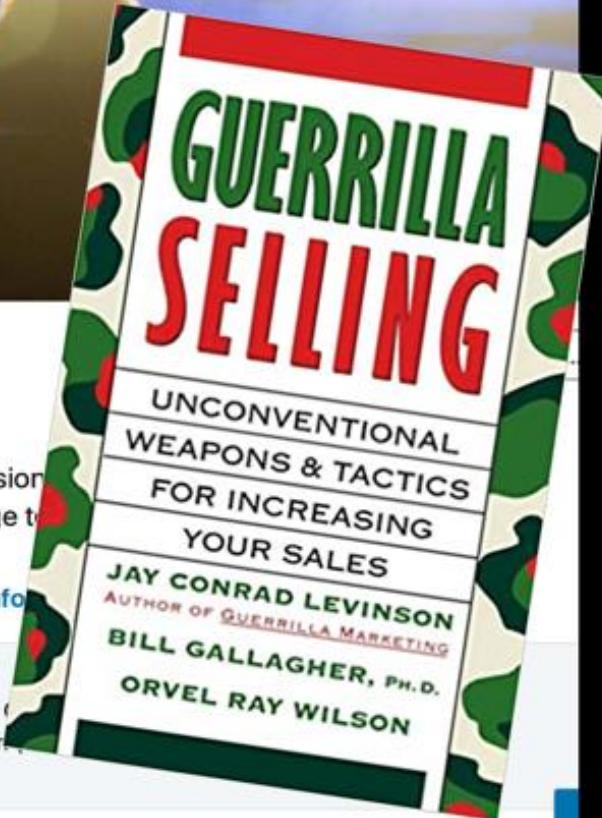
Certified Executive Speech Coach helping professionals discover, develop and deliver their unique message to the world.

Greater Denver Area · 500+ connections · [Contact info](#)

Providing services

Public Speaking, Career Development Coaching, Executive Consulting, Marketing Strategy, Search Engine Optimization

[See all details](#)



The Inescapable Nature of Change

**Change
is inevitable**

Why Change is Important

**Change is required
for improvement**

But...

**Pretty much everything
else I believed about
how people make action
decisions was wrong**

Ok...So...

How do we get *Better!*

Results Accelerator



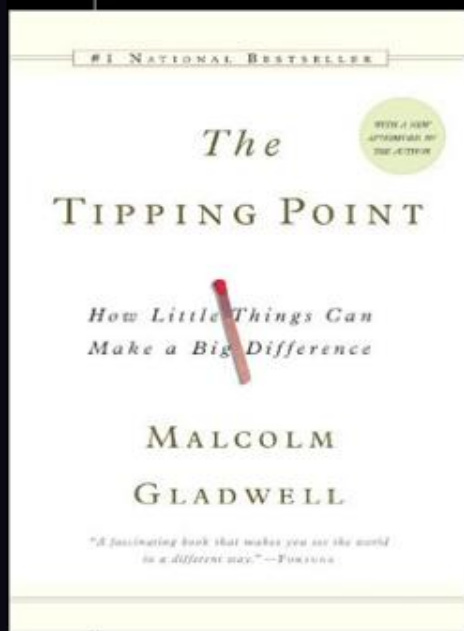
**Find someone who does it
*Better!***

and copy them

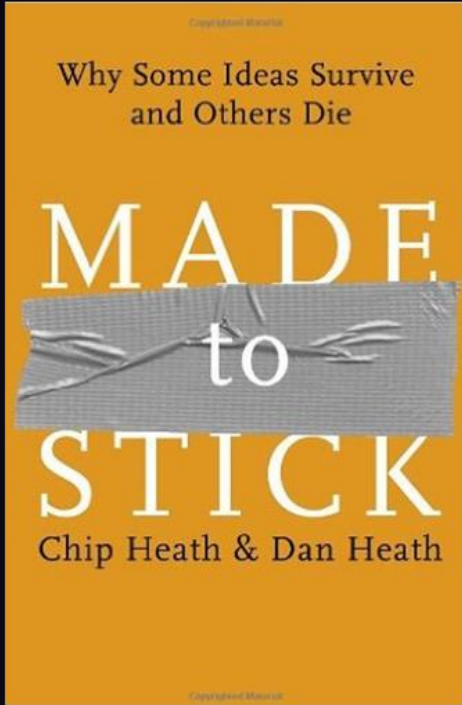
SECRET SAUCE

**Copying
proven practices
accelerates
progress**

“Sticky Ideas”



Ideas are understood
and remembered –
creating lasting impact
***Change the listener's
opinions or behavior***



Made to Stick

Why Some Ideas Survive and Others Die

**Chip Heath
Dan Heath**

Foundation Lessons

1. **Beliefs drive actions**
2. **It always has to be their idea. *Always.***
3. **The Status Quo feels safe**
4. **Clarity dissolves anxiety**
5. **'Why' before 'How and What'**
6. **Visual is critical**
7. **Prototypes & Third-Man Examples**
8. **Half time pivot to solutions**
9. **Master Skills Stacking**

The Importance of Beliefs

**All action
is preceded by
Belief**



The Importance of Beliefs

Do you

BELIEVE

it's your job to influence
management action?



For Example

**Do you believe
most people
resist change**

Yes or No?

**Most people
resist change
*that is or even
feels
forced on them***

What We All Prefer

My idea,
on my terms,
on my schedule

**Most people
will defend ideas
that
are or they believe
are their own**

What We've All Been Taught

$$\text{ROI} = \text{Benefits} / \text{Costs}$$

What's Reality

ROI =

Pleasure / Pain

What's Reality

When considering
needed changes,

if it's not my idea I will

UNDERVALUE BENEFITS

and

OVERVALUE COSTS

What's Reality

But when the change is
my idea, I will

OVERVALUE BENEFITS

and

UNDERVALUE COSTS

Play the Probabilities

THEREFORE

**Our best - perhaps only -
option is to help them
build their own ideas**

**Our role is to lead and guide
that process**

Most Important Lesson

The importance of
understanding

Their Beliefs

Action or Inaction
is based 100% on

Their Beliefs – NOT OURS



Foundation Lessons

1. Beliefs drive actions
2. It always has to be their idea. Always.
3. The Status Quo feels safe
4. Clarity dissolves anxiety
5. 'Why' before 'How and What'
6. Visual is critical
7. Prototypes & Third-Man Examples
8. Half time pivot to solutions
9. Master Skills Stacking

**Help them see
the better future –
from their P.O.V**



**We Must
Recognize & Manage
Each Person's
Context**

**AN INDIVIDUAL'S
P.O.V. is EVERYTHING**



P.O.V. Exercise

Point of View

My

P.O.V.

(my story)



Point of View

Their

P.O.V.

(their story)



Point of View

Our Common

P.O.V.

(our story together)

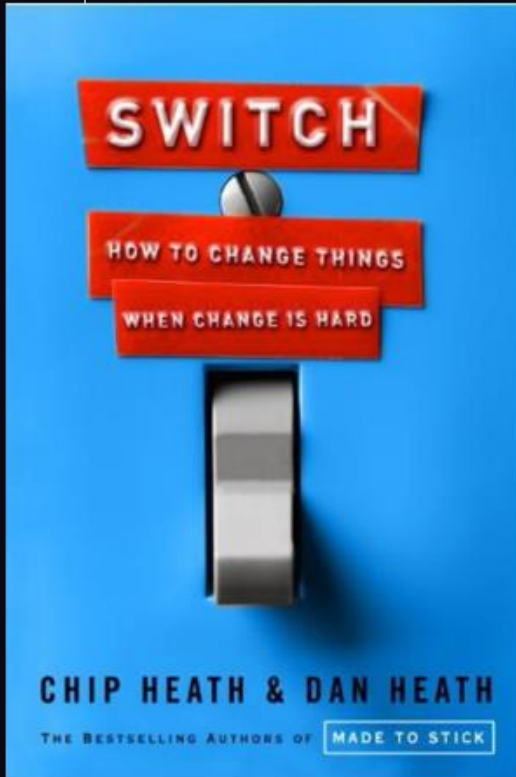
“

**Meet people
where they are.
Take them where
they want to be.**

— Rachel Hanfling

Foundation Lessons

1. Beliefs drive actions
2. It always has to be their idea. *Always.*
3. The Status Quo feels safe
4. Clarity dissolves anxiety
5. 'Why' before 'How and What'
6. Visual is critical
7. Prototypes & Third-Man Examples
8. Half time pivot to solutions
9. Master Skills Stacking



Switch

*How to Change
Things When
Change is Hard*

Chip Heath
Dan Heath

“Switch”

Chip & Dan Heath

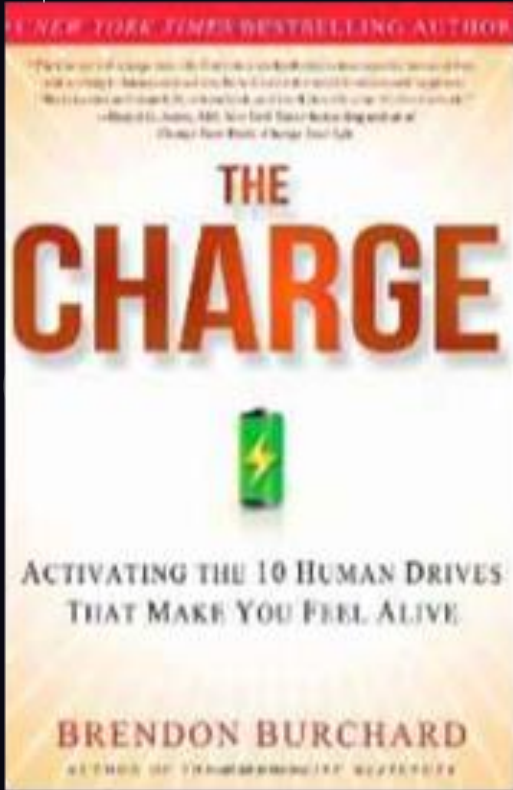
**Uncertainty
makes people
anxious**



“Switch”

Chip & Dan Heath

**The most comfortable path
is the
Status Quo**



The Charge

Brendon
Burchard

“The Charge”

Brendon Burchard

CHARGED!



WE CAN CHANGE THE WORLD – for the BETTER!

COMFORTABLE



O.K., FINE, SAFE

90%

CAGED

BOXED IN, LIMITED MOVEMENT, ISOLATED

SOCIAL PROOF

The majority of people
won't try something until
someone they know
has tried it first


“Switch”

Chip & Dan Heath

**When the path
forward is uncertain,
most people will
insist on taking the
default path**

“Switch”

Chip & Dan Heath



**If we want people
to change,
we must provide
crystal clear direction**

Foundation Lessons

1. Beliefs drive actions
2. It always has to be their idea. *Always.*
3. The Status Quo feels safe
4. Clarity dissolves anxiety
5. 'Why' before 'How and What'
6. Visual is critical
7. Prototypes & Third-Man Examples
8. Half time pivot to solutions
9. Master Skills Stacking



Clarity

It's not their job to know what they want from us.

We must tell them how to think about us and our work.

Tell them why our work will benefit them.



SEEDING
is **PLANTING**
a thought that
INFLUENCES
how people
PERCEIVE
an issue, topic,
idea or product

FRAMING

is the **PLACEMENT**
of a subject, idea, or
product in relation to
other subjects, ideas,
or products to
INFLUENCE
how it is
PERCEIVED





ANCHORS
are **INTENTIONAL**
STATEMENTS
that **INFLUENCE**
people toward
a persuader's
preferred **OUTCOME**

**A Big Opening
Statement**

Step One

Anchor the Audit



Purpose Exercise

1. “Our Purpose is...

We help X do Y so they can Z.”

Benefit to you...

For example...

**Bight Spot
Transition Examples**

Third-Man Bright Spot Examples

The majority of people
won't try something until
someone they know
has tried it first

Bright Spot Transition Examples

BEFORE →

AUDIT →

BETTER!

Collect Transition Examples

**Visual Bright-Spot
Springboard Stories**

Step Two

*Anchor Every
Interaction*

Cash Disbursements Audit Update
August 26, 2020 (10:00 to 10:30 Pacific)

PURPOSE: review results of audit testing - new vendors

AGENDA

1. Our testing approach
2. Review of 12 potential exceptions noted
3. Feedback from all participants
4. Potential solutions?
5. Open discussion

Agenda Anchor



Dr. Robert Good
Orthopedic Surgeon
Bryn Mawr, PA

Anchoring

Pat, thank you for your time today. Let me begin by saying again why I asked to meet with you.

During our vendor testing, we noticed 14 sole source suppliers that look like they were added to the master file without the full support required by our policies.

**Based on “Quiet Leadership”
David Rock**

Anchoring

So three things while I'm here.

First, I want to share with you exactly what we saw and get your feedback on our preliminary conclusions.

Based on "Quiet Leadership"
David Rock

Anchoring

Second, assuming you agree with our observations, I'd like to get your suggestions on how to best address this concern going forward.

After all, you're much closer to this issue than we are. So your suggestions are critical to any potential solution.

Based on "Quiet Leadership"
David Rock

Anchoring

And last for now, we're going to take no more than the half-hour we scheduled unless you want to extend the conversation past that.

Is that all good for you?

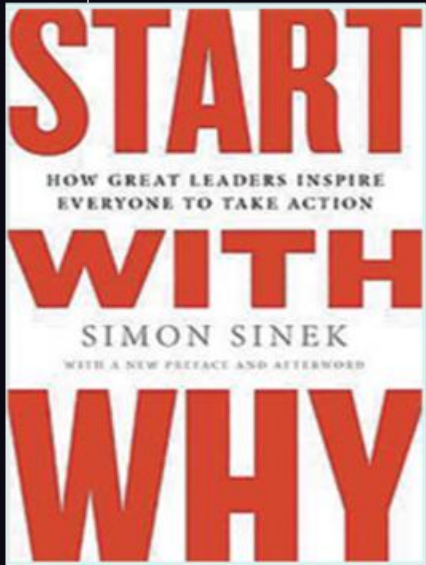
Great! Let's get started by looking at those 14 vendors.

Based on "Quiet Leadership"
David Rock

Anchoring
+
Permission

Foundation Lessons

1. Beliefs drive actions
2. It always has to be their idea. *Always.*
3. The Status Quo feels safe
4. Clarity dissolves anxiety
5. 'Why' before 'How and What'
6. Visual is critical
7. Prototypes & Third-Man Examples
8. Half time pivot to solutions
9. Master Skills Stacking



59,230,240 views | Simon Sinek • TEDxPuget Sound

[Like \(1.7M\)](#) [Share](#) [Add](#)

How great leaders inspire action

[Read transcript](#)

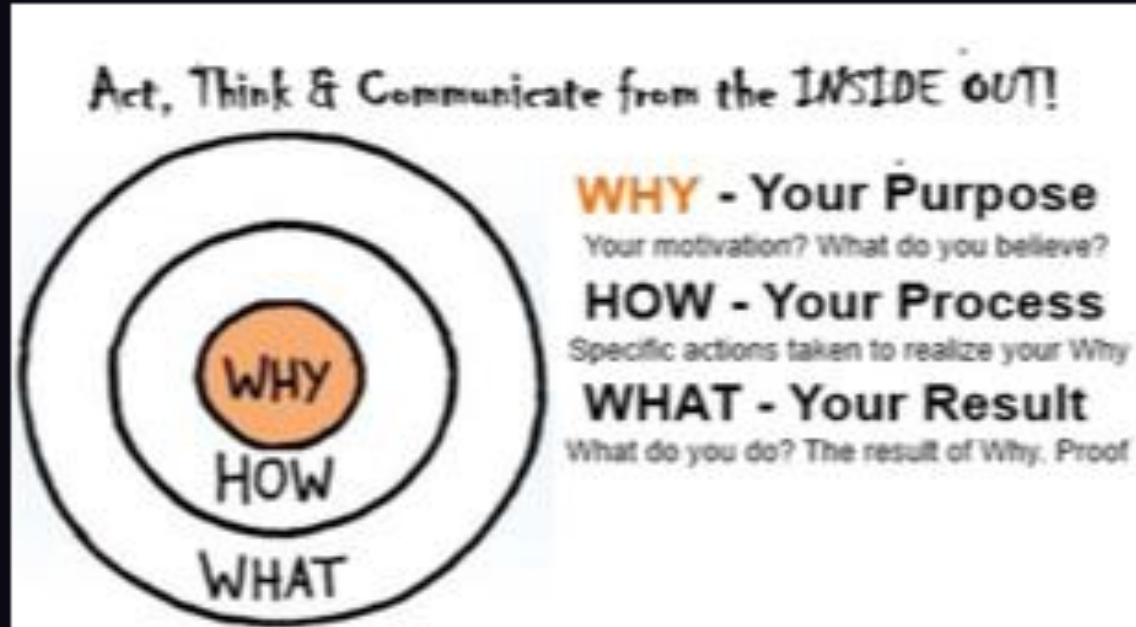
Simon Sinek has a simple but powerful model for inspirational leadership -- starting with a golden circle and the question: "Why?" His examples include Apple, Martin Luther King Jr. and the Wright brothers ...

INFLUENCE thru ANCHORNG

**18-Minute
Master Class**

The Golden Circle

Start With Why
Simon Sinek



https://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action

Foundation Lessons

1. Beliefs drive actions
2. It always has to be their idea. *Always.*
3. The Status Quo feels safe
4. Clarity dissolves anxiety
5. 'Why' before 'How and What'
6. Visual is critical
7. Prototypes & Third-Man Examples
8. Half time pivot to solutions
9. Master Skills Stacking

Fraud Losses

1% of revenue

\$170 Million

● **Visual
Transition Stories
Sell**

Approximating

“

**The brain
craves patterns
and searches for
them endlessly**

Thomas B. Czerner, M.D.
What Makes You Tick

Foundation Lessons

1. Beliefs drive actions
2. It always has to be their idea. *Always.*
3. The Status Quo feels safe
4. Clarity dissolves anxiety
5. 'Why' before 'How and What'
6. Visual is critical
7. Prototypes & Third-Man Examples
8. Half time pivot to solutions
9. Master Skills Stacking

“

**A prototype
is worth a
thousand meetings**

Mike Davidson

Former VP of Design at Twitter

SOCIAL PROOF

The majority of people
won't try something until
someone they know
has tried it first

Easy-Peasy Script

PURPOSE →

BENEFITS →

EXAMPLE

Foundation Lessons

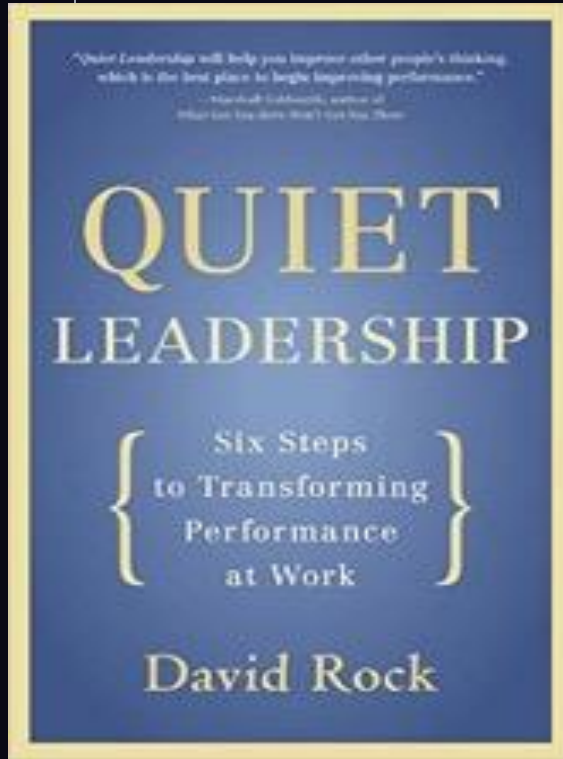
1. Beliefs drive actions
2. It always has to be their idea. *Always.*
3. The Status Quo feels safe
4. Clarity dissolves anxiety
5. 'Why' before 'How and What'
6. Visual is critical
7. Prototypes & Third-Man Examples
8. Half time pivot to solutions
9. Master Skills Stacking

Consultative Pivot

Pivot their

Focus to

Solutions



Quiet Leadership

David Rock

Problems
and
Solutions

“Quiet Leadership”

David Rock

**Focusing on problems
leads us to the past.**

**Focusing on solutions
leads us to the future.**

Our choices in the moment

Problems → Solutions

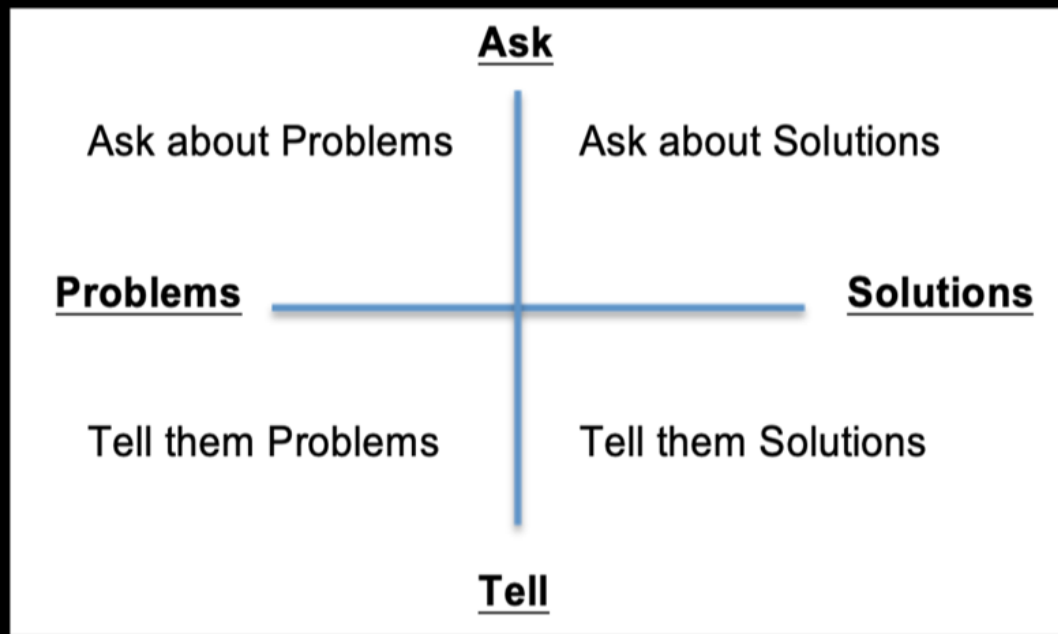
Why isn't this working?

50%

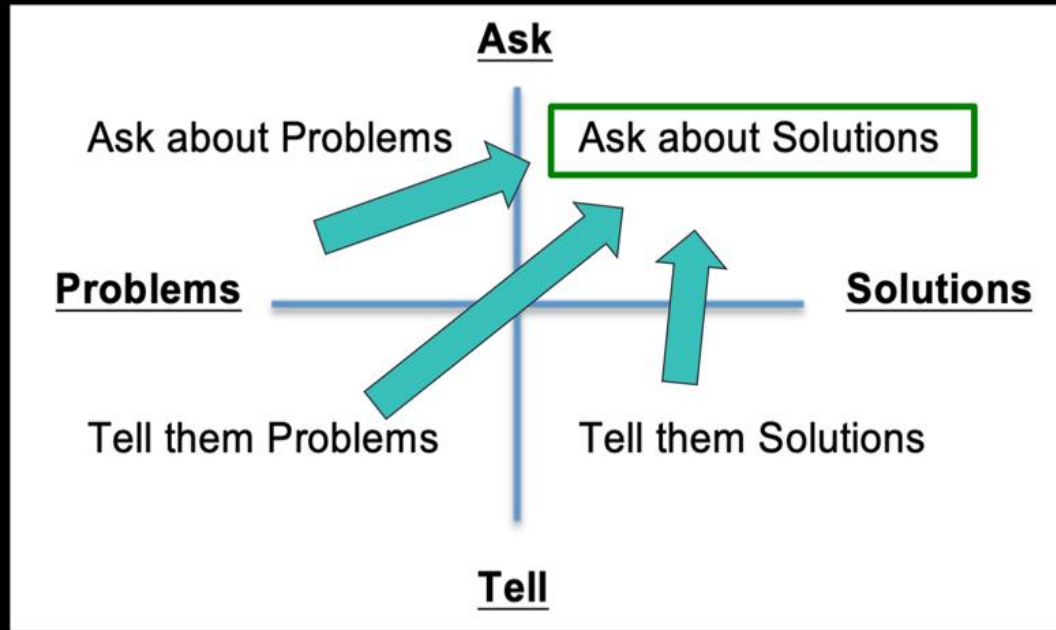
**What do we need to do
to make this work?**

50%

Ask About Solutions




Ask About Solutions



**The questions we ask,
how we ask them,
and the things we ask about
will influence their thinking,
their reactions,
and maybe their behavior**

Influencing Questions

- a. How do your supervisors know if...
- b. How do you monitor...
-  c. Do you receive the right information to know if...
- d. In your opinion, what causes...
- e. What do you consider before approving...

WRITING
TO
PERSUADE



TRISH
HALL

FOURTH EDITION OF THE
NEW YORK TIMES BEST-SELLER

*"This is one of the best textbooks for teaching writing."
—Mortimer, the author of the award-winning novel, The Daylight Marriage*

What if we...

Foundation Lessons

1. Beliefs drive actions
2. It always has to be their idea. *Always.*
3. The Status Quo feels safe
4. Clarity dissolves anxiety
5. 'Why' before 'How and What'
6. Visual is critical
7. Prototypes & Third-Man Examples
8. Half time pivot to solutions
9. Master Skills Stacking



**Selling
Audit Ideas
is a Campaign**

Not an Event

Homework Before the Sale

- a) **Their Budget**
- b) **Their Objectives**
- c) **Their KRI's**
- d) **Their Environment**
- e) **Questions we will ask**
- f) **Benefits of our solutions**
- g) **Third-Manning example(s)**

Brendon Burchard

MASTERY
comes from
dedication to
fundamentals

“

Checklist for Selling Audit Ideas

1. **Surface issues and determine causes**
 2. **Ask for dedicated time to discuss**
 3. **Anchor the discussion**
 4. **Ask (*again*) for permission to discuss**
 5. **Present the issue and support**
 6. **Get agreement that issue is an issue**
 7. **Get agreement on the real causes**
 8. **Ask them for solutions**
-
9. **Offer suggestions only when asked**
 10. **Anticipate and diffuse objections**
 11. **Get firm commitment for the first step**
 12. **Close with Positive Reinforcement**

Positive Reinforcement

Appreciation

**I really appreciate
the time you set aside
for this meeting.**

Positive Reinforcement

Validation

- **I can see you've given this issue a lot of thought and attention.**

Positive Reinforcement

Recognition

It's clear you are a well-respected thought leader on this issue.

Positive Reinforcement

Confirmation

- **I'm relieved that you agreed to take on this issue. It's a great match with your expertise.**

Positive Reinforcement

Thanking

● **Thanks for taking the time to focus on this issue.**

Before Influence

1. **Build credibility**
 - **Expertise**
 - **Relationships**
2. **Pre-frame and seed common ground**
3. **Build courage & authenticity behaviors**
4. **Collect Bright Spots**
5. **Learn *Joint Fact-Finding***

At Influence Opportunities

1. **Set the anchor**
2. **Ask permission**
3. **Speak intentionally**
4. **Provide evidence**
5. **Connect emotionally**
6. **Avoid Hot Spots**
7. **Take small steps – celebrate all wins**
8. **Provide Positive Reinforcement**

Foundation Lessons

1. Beliefs drive actions
2. It always has to be their idea. *Always.*
3. The Status Quo feels safe
4. Clarity dissolves anxiety
5. 'Why' before 'How and What'
6. Visual is critical
7. Prototypes & Third-Man Examples
8. Half time pivot to solutions
9. Master Skills Stacking

**Questions, Comments, Ideas,
1-on-1 Discussion or Anything Else**

John@JohnHallSpeaker.com

www.JohnHallSpeaker.com

(312) 560-9931