



Teaching Your Staff to Be More Persuasive

These insights can help boost employee productivity.

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Persuasiveness is a vital skill for the medical practice staff. Your employees need to persuade others both to complete their job assignments and to succeed in their careers. In fact, they may rely upon their persuasiveness far more often than they realize. For example, your employees may need to persuade a reluctant patient to schedule a follow-up appointment or to pay what's owed on a delinquent account. Or they may need to persuade a vendor who is holding up an order to provide faster delivery on urgently needed supplies. Likewise, they may need to muster all of their persuasive skills when a piece of essential office or medical equipment breaks and the service provider says he can't come to your office until next week. And they may need to persuade their colleagues—and even you from time to time—to accept their new ideas. As Sund-

heim¹ succinctly puts it, “By learning how to get others to say ‘yes,’ we can flourish in nearly any capacity of our professional lives.”

Although most employees need to be and want to be persuasive, few are naturally so. Most focus too much on themselves and what they want,

And even when they have the best of intentions, some of them may, without guidance and supervision, resort to using persuasive techniques that are underhanded, dishonest, and otherwise inappropriate in your medical practice. Therefore, when teaching and encouraging your employees to

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rather than on how to be most effective in persuading others. They need to learn how to be persuasive. Fortunately, that's something you can teach them.

Begin With the Ethics of Persuasion

Learning to be persuasive comes with great responsibility. Your employees can use their persuasive skills for good or for bad reasons.

be more persuasive, a good place to begin is with the ethics involved.

Is it right to try to work actively to persuade others, or is persuasion just a form of mental manipulation? Is it ever okay to bend the truth or to exaggerate to get someone to do what we want, especially if it is for that person's own good? Is it acceptable to play on another person's guilt

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or sympathy to get him or her to do what we want? How long is it okay to try to persuade someone before the behavior becomes counter-productive and abrasive? And how hard can we push our agenda before we have

your medical practice. Influence, on the other hand, relies upon truth and sincere buy-in. As DeFalco suggests, influence is having a vision of the optimum outcome for a situation or organization and then, using the truth and without using force or coercion, motivating people to work together

want them to be persuasive, there are definite rules in place and that they must abide by them, and that breaching the rules will have consequences. Chief among these rules is that they must be completely truthful, not hide anything, not exaggerate anything, and not make things seem more urgent or important than they really are. They must also ask people to do as they wish without drawing upon their sympathy and without asking them for a big favor that can never be repaid. Always, in your practice, the person being persuaded must know the truth and not be guilted or pressured into knuckling under.

Once you are certain that you have sufficiently explored the ethics of persuasion with your staff, you can begin to teach them how to be more persuasive. The following section presents 10 techniques that you can share with them. Of course, nothing can take the place of practice and critical feedback. Role plays will be an excellent way for your staff to try these techniques in a safe and supportive learning environment. You

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pushed too hard? Such questions are important for you to discuss with your employees before you equip them with new persuasive skills.

It will be helpful, too, if you incorporate into your discussion and lessons how you define persuasion in your medical practice. Don't be surprised if most, if not all, of your employees regard persuasion as a relatively straightforward process. They may tell you that they believe that persuasion relies upon their making a strong statement of their position, outlining their supporting arguments, and offering an assertive, often data- or fact-driven rationale. That's what most people think persuasion is. They may assume, too, as many people do, that persuasion is the combination of logic, persistence, and personal enthusiasm, and that that is all they will need to get others to agree with their good idea. However, to quote Harrison,² "Wrong. Wrong. Wrong! This doesn't work."

So what is a better way to think about persuasion? According to DeFalco,³ persuasion is what we do when we present a case in such a way as to:

- Sway the opinion of others;
- Make people believe certain information; or
- Motivate them to make a decision.

There is one caveat. Following DeFalco's definition, persuasion can in some cases be used to "spur someone to action or to make a decision without actually earning their sincere buy-in," DeFalco warns. That kind of persuasion is not what you want in

toward making the vision a reality. As DeFalco explains, "With influence, dedicating time to win someone's heart or earn mindshare is a prerequisite to the process of inspiring them to take action or make a particular decision."

Therefore, the best way for your employees to define persuasion in your medical practice is to regard it as an intentional and purposeful form of influence. They should not and cannot believe that they can use any

The best persuaders closely observe and study the issues that matter to others.

tactic they like to persuade a patient or co-worker.

More specifically, it's important from the start that you help your staff understand that although lies, omissions, fear tactics, and exaggeration can be extremely persuasive in some cases, such techniques have no place in your medical practice. You must continue to remind them of this as you teach them persuasive techniques, and for as long as they use them with your patients and their co-workers. Then you must be watchful and diligent. Keep your eyes and ears open, and tell your employees that you will be doing so, to be sure that they are not crossing any ethical lines you have drawn.

Be certain that your employees understand that, although you

also can ask your staff to debrief their persuasive efforts once they go live with them in your practice. You also may find that you want to coach one or more employees one-on-one to help them improve their persuasive skills. This would be a good idea, for instance, with employees who often find themselves trying to persuade your patients to do something they don't want to do, such as those who seek to collect payment on delinquent accounts.

Ten Persuasive Techniques for Medical Practice Employees

The following sections present 10 persuasive techniques that you can teach to your employees. When you do, be mindful not to overload them.

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The Twenty-One Principles of Persuasion

The most influential people adhere to a consistent set of persuasive principles. Nazar¹ identifies 21 such principles, divided into three categories: the basics, general rules, and personal skills. Medical practice employees can apply these principles when they seek to persuade patients, co-workers, and others:

The Basics

1) Persuasion is not manipulation. Manipulation uses coercion, trickery, and force. Persuasion is a form of influence that is truthful and relies upon the person's free will.

2) Identify the persuadables. Although everyone can be persuaded given the right timing and context, it's most efficient and effective to focus your persuasive efforts on the people you can more easily and more quickly persuade. Go after the low-hanging fruit first.

3) Context and timing matter. Context creates a relative standard of what's acceptable. Timing dictates what a person wants and needs at any given moment, and what we want can change over time. For instance, a patient may delay the decision about elective surgery when her symptoms are manageable. However, she may be more easily persuaded to schedule the surgery when the symptoms worsen.

4) Interested people are easier to persuade. It's challenging to persuade a person who is not interested in what you have to say. Capturing a person's attention must come first, and you can usually do that by focusing on his or her health, money, or love.

General Rules

5) Reciprocity compels. When you do something for someone, he or she will feel compelled to do something for you. According to Nazar, "It is part of our evolutionary DNA to help each other out to survive as a species."

6) Persistence pays. People who are willing to keep asking for what they want, and keep demonstrating value, are ultimately the most persuasive.

7) Sincere compliments work. We're more likely to trust people for whom we have good feelings. And most of us feel favorably toward a person who compliments us. The caveats here are to be sincere and not to overdo it, or your compliments will ring false.

8) Set expectations. Much of persuasion is managing others' expectations so they can trust your judgment. As Nazar suggests, "Persuasion is simply about understanding and over-delivering on others' expectations."

9) Don't assume. If you think you know what people need or want, think again. Offer everything you can provide and leave the choice to them.

10) Create scarcity. Scarcity heightens desire, value, and action. Be careful that you don't exaggerate how scarce a resource is. However, if time, money, and materials are in short supply, say so.

11) Create urgency. Don't lie or exaggerate. But if delaying the decision or action can lead to a worse outcome, describe what that would look like. For instance, if a patient doesn't want to schedule his next appointment, remind him that your schedule fills up quickly and that he may end up having to wait longer to see the doctor if he delays.

12) Visuals matter. Imagery usually is more potent than what we hear. Use visuals, and paint vivid images with your words.

13) Tell the truth. Sometimes the most effective way to persuade others is by telling them the things about themselves that nobody else is willing to say.

14) Build rapport. Mirroring and matching others' behavior is one way to do this.

Personal Skills

15) Be flexible. The larger your repertoire of persuasive behaviors, the more persuasive you'll be.

16) Learn to transfer your energy. The most persuasive people know how to transfer their energy to others, and in so doing, motivate and invigorate them. As Nazar suggests, "Sometimes, it's as straightforward as eye contact, physical touch, laughter, excitement in verbal responses, or even just active listening."

17) Communicate clearly. Persuasion depends on simplifying an idea down to its core and communicating to others what you care about.

18) Be prepared. Your starting point should be to learn about the people and situations around you. Do your homework.

19) Detach and stay calm. You'll have the most leverage in situations of heightened emotion when you remain calm, detached, and unemotional.

20) Use anger strategically. Do not express anger from an emotional place or from a loss of self-control. Express anger only when doing so helps you achieve your goals.

21) Be confident and certain. A person with unbridled certainty is more likely to persuade others than one who is tentative. As Nazar suggests, "If you believe in what you do, you'll be able to persuade others to do what's right for them." **PM**

Reference

¹Nazar J. The 21 principles of persuasion. Forbes, March 26, 2013. www.forbes.com/sites/jasonnazar/2013/03/26/the-21-principles-of-persuasion/#2bb27eb3a4c9. Accessed January 24, 2019.



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Each of these techniques can be its own lesson, with accompanying practice, feedback, and debriefing.

1) Don't Expect Others to Care about Your Needs.

You may need to fill an open appointment in your schedule, collect money that is due the practice, or get faster delivery or service from a vendor. Or you may want to persuade a co-worker to cover for you so you can take time off. But those are your needs, and others will not care about them as you do. As Sundheim suggests, "If you desire to become more persuasive, get in the habit of addressing the concerns of others." When possible, avoid focusing on "I" and instead, focus on "you" in your conversations, Sundheim suggests.

For example, don't say to a patient, "I have an opening in Dr. Smith's schedule next Tuesday at 3:30." Instead, say, "Yes, thank you for telling me that you want to see Dr. Smith as soon as possible. I've just checked her schedule for you, and the soonest opening she has is next Tuesday at 3:30. You may want to book that appointment right now, as her schedule fills up very quickly. But once we schedule that appointment for you, I can put you on a short-notice call list and let you know if anything opens up in her schedule between now and then."

2) Seek Common Ground.

The best persuaders closely observe and study the issues that matter to others. As Harrison explains, "They use conversations, meetings, and other forms of dialogue to collect essential information. They are good listeners. They test their ideas with trusted contacts and question the people they will later be persuading." Often the process of seeking common ground causes them to alter or compromise their plans before they even start persuading, Harrison says. However, the upfront effort is worth it. By using this thoughtful, inquisitive approach, they will be in the best position to appeal to and persuade others. Seeking common ground in your medical practice may be as simple for

your employees as asking thoughtful questions.

For example, if a patient says to your employee, speaking of your fee, "That's very expensive," your employee might genuinely ask in a non-judgmental tone, "What do you mean by expensive?" Then the patient can explain whether she means that it seems expensive for the service, expensive compared with competitors, expensive compared with other household expenses, expensive to be paid all at once, or something else. Once your employee has identified the common ground with the

tactic. Finally, don't use the person's name only when you are trying to persuade him/her to do something. To use this technique well, it's best to use it all the time in your conversations. That way, it will become a habit and will seem much more natural and sincere when you use it in a persuasive conversation.

4) Focus on the Key Influencer.

At times, you will be trying to persuade more than one person at a time. In such situations, it is helpful to identify who is going to be most influential in making decisions

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patient, it will be much easier to persuade her to move forward with her treatment or to work out a payment plan on a delinquent account.

3) Use the Person's Name in the Conversation.

Calling a person by name and using his or her name often is a subtle yet effective way to make yourself more persuasive. As the Young Entrepreneur's Council⁴ suggests, "Using someone's name in conversation shows the person you value them and builds a connection between both parties." As effective as this technique is, there are a few caveats about how to make this work. First, be sure to pronounce the person's name correctly. It is disconcerting and distracting when someone calls us by the wrong name or mispronounces the right one. Second, use the correct form of address (e.g., Ms., Mr., Dr.). Don't assume that you can call a patient by his or her first name.

When in doubt, err on the side of formality and wait until the patient invites you to be on a first-name basis. Third, don't overdo it by heavily peppering your conversation with the person's name. That will quickly be annoying and seem like an obvious and disingenuous sales

or coming on board to what you propose. This may be an especially helpful strategy when you are trying to persuade patients who bring others with them to their appointments, or when you are trying to persuade a group of your co-workers. As Fisher⁵ suggests, "... employees who are unsure of a plan can be swayed more by the fact that fellow employees they hold in high regard are on board." It is important, therefore, for you to recognize who will be the key influencer(s) and to persuade them to align themselves with you in winning over others, Fisher says. This can sometimes be accomplished as a one-one-one sidebar before a larger conversation that involves others.

5) Be Willing to Compromise.

Many people see compromise as surrender. However, Harrison suggests that compromise is essential to constructive persuasion. As Harrison explains, "Before people buy into a proposal, they want to see that the persuader is flexible enough to respond to their concerns. Compromises can often lead to better, more sustainable, shared solutions." Compromise can come into play in your medical practice when an employee's

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attempts at persuasion are at a standstill. For example, suppose that one of your employees has been trying to persuade her co-workers to make a permanent change in the way you do things in your practice, but that she has met a lot of resistance. She could suggest this compromise: do it the new way for a two-week trial period, and then meet to assess how it went. That will seem to her co-workers like a reasonable approach, and it will yield a better outcome than giving up or continuing to push an unpopular agenda.

6) Play Up Your Credibility.

People are more easily persuaded by those they know and perceive as knowledgeable and credible. As Beck⁶ suggests, “Establishing a relationship and proving expertise in relevant areas helps to establish credibility.” Most of us consider an individual’s past successes when determining whether to back new ideas and initiatives. Individuals with a reputation for being trustworthy and fair often are successful in persuading others to accept new ideas. Therefore, employees who have been in the practice for a while and who have established a track record for being credible will probably have the easiest time convincing their colleagues and established patients to do what they propose.

New employees, however, may have a harder time establishing their credibility. As the manager, you can help them to be perceived as more credible by speaking positively of them and by being very careful not to undermine their authority. It will help if you delegate authority to them and stand back so they can establish themselves. New patients may not at first perceive your employees as credible, because that can take time. Your staff will need to exercise patience. To establish their credibility, they may find it helpful to speak to new patients of how long they have worked in the practice, what kind of training they have received, and how highly they think of the doctor’s work.

How Does Persuasion Differ Today?

Persuasion has been of interest since the time of the Ancient Greeks. However, there are significant differences between how persuasion was used in the past and how it works today. Perloff¹ offers five major differences between then and now that underscore how challenging it is to be persuasive today:

1) The number of persuasive messages has grown tremendously. The average U.S. adult is exposed to around 300 to over 3000 ads every day. People in ancient times were exposed to a small fraction of that number of persuasive messages.

2) Persuasive communication travels far more rapidly. Television, radio, and the Internet all help spread persuasive messages at lightning speed.

3) Persuasion is big business. Today we have companies that are in business purely for persuasive purposes (e.g., advertising agencies, marketing firms, and public relations companies). In addition, many, if not most, other businesses rely on persuasion to sell goods and services and hire people with finely developed persuasion skills.

4) Contemporary persuasion is much more subtle. Of course, there are plenty of persuasive messages that are hit-you-over-the-head obvious, even today. But some persuasive messages are so sophisticated that it’s not clear that they are trying to be persuasive at all. For example, many companies today advertise the fact that a portion of their proceeds supports charities. However, their primary purpose, which is neither clearly stated nor as obvious, is that they are trying to persuade consumers to buy what they have to sell, and that they will still be drawing a profit.

5) Persuasion is more complex. Consumers today are more diverse and have exponentially more choices than in the past. Therefore, persuaders today must be much savvier than in the past when they choose their persuasive media and craft their messages.

Bottom line: Today’s consumer is being bombarded with a sometimes overwhelming number of sophisticated persuasive messages. Developing one’s persuasive skills is the best way to succeed in this highly competitive environment. **PM**

Reference

¹Perloff RM. *The Dynamics of Persuasion: Communications and Attitudes in the 21st Century*. 5th ed. Abington-on-Thames, UK: Routledge. 2013.

7) Let the Other Person Speak First.

There comes a time in every persuasive conversation when it pays for the persuader to keep quiet. Letting the other person speak could be just what is needed to get what you want. As the Young Entrepreneur Council suggests, “If you let somebody speak first, they’ll usually tell you what they want to hear and what you need to do to get the conversation across

the finish line. Then you know exactly what your target is.” Then, by listening actively and by being empathetic, you can appeal to the person’s human side, which is where decisions end up getting made. Of course, it can be very hard to stop talking when we are passionate and when there is a lot at stake. Silences can seem like voids that need to be filled. However, it’s important for your staff

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to allow the other person to fill that space. Practice can be especially helpful in learning this persuasive skill, because it may not seem natural at first to keep quiet.

8) **Appreciate Conflicting Opinions.**

When we run into a disagreement, most of us are quick to judge the other party's point of view and then attempt to persuade through contradiction. As Sundheim warns, "As many have seen from experience, this has the opposite of the desired effect." Cooperation in conversation, Sundheim says, is achieved when you show that you consider the other person's ideas and feelings as important as your own. Therefore, instead of condemning or criticizing others for thinking differently, it's much more effective to try to understand their reasons. Sundheim adds, "Most

new system for inventorying supplies. She realizes that it will take your staff a significant initial investment of time and effort to switch over to the new system. There will be growing pains. Yet she believes that this is the best course long-term for your practice, and she has done her homework to back that up. Before sharing her idea with others,

ing to go!" Those being persuaded are likely to buy in enthusiastically when they feel that they've put their own stamp on the idea. When possible, let them have a chance to do that. **PM**

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¹ Sundheim K. How to be more persuasive at work. Personal Branding Blog:

Letting the other person speak could be just what is needed.

she might prepare take-away phrases to address this concern. Specifically, she might describe her proposed inventory system as requiring "a small upfront investment that pays huge dividends." Or she might say that the initial work is like "planting seeds that will bear a lifetime of fruit," or that the new system will "save time,

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³ DeFalco N. Influence vs. persuasion: a critical distinction for leaders. Social Media Today. October 30, 2009. www.socialmediatoday.com/content/influence-vs-persuasion-critical-distinction-leaders. Accessed January 24, 2019.

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⁵ Fisher C. Examples of persuasive thinking in the workplace. The Nest. <https://woman.thenest.com/examples-persuasive-thinking-workplace-22094.html>. Accessed January 28, 2019.

⁶ Beck C. Examples of persuasive thinking in the workplace. Chron. <https://smallbusiness.chron.com/examples-persuasive-thinking-workplace-18983.html>. Accessed January 28, 2019.

The effective persuader does not worry about taking credit for the idea. Rather, she focuses on the outcome.

disputes are never settled because each party fails to show sympathy for the other's opinions."

9) **Have Two or Three Take-away Phrases in Mind.**

Using the right words can go a long way toward helping people grasp, understand, and accept your ideas, especially when those ideas are complex and when there will be obstacles to overcome. Therefore, it is helpful to prepare a few short takeaway phrases before you enter the persuasive conversation. Make these phrases as succinct, clear, crisp, memorable, and attractive as you can. As the Young Entrepreneur Council suggests, take-away phrases should encapsulate big ideas and resonate well with others. Think in terms of crafting phrases that "really speak to them," they say.

For example, suppose your employee would like to implement a

work, money, and years of frustration in the long run." These are powerful take-away phrases that will encourage buy-in.

10) **Make It Seem Like Their Idea All Along.**

The effective persuader does not worry about taking credit for the idea. Rather, she focuses on the outcome. According to the Young Entrepreneur Council, "Too often, people approach being persuasive as moving people from point A to point B, instead of saying, 'Let me join you at point A and see where we go.'" "Talking through a situation with the people you are trying to persuade, and letting them participate, allows them to take the journey with you. "In fact," the Young Entrepreneur Council adds, "sometimes halfway through the journey, it becomes their idea to go to Point B: the exact place you've been try-



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