

Enlisting Others to Achieve Goals

By Ed O'Neil, PhD, MPA

At a basic level, leadership simply means working effectively through others. Much of this work is done without formal authority, such as that which is derived from your position in the organization. This means that your influence must be gained by other means. One of those means is how effective you are at **enlisting others** in achieving the goals, short and long term, that you desire.

Even though you likely have formal authority over some individuals in the organization, all good leaders want to build a relationship that enlists direct reports in work that goes beyond their job description. There may be some leadership roles, such as a project team leader that grants formal authority over other members of the team, but often these assignments contain mixed priorities and allegiances that can only be offset with skilled efforts at enlistment. When influencing up there is rarely, if ever, any formal authority. Instead, it must be generated by other legitimate means in order to enlist the endorsements of those you need who wield power in the organization.

Whether or not we are aware of it, most effective leaders have ways of enlisting others, but in this era of distance working some of these may not be available or may have atrophied over the past few months. Without being in the office, we may be cut off from the informal check in with a colleague on a project, lack the informal information network of scuttlebutt and the water cooler, cannot always see another's face to judge initial reactions, can't do the quick informal apology when a misstep may have occurred, do not have the familiar setting of the team meeting room with reminders of past work together, and/or can't see those leaders that inspire us to continue to work in common ways. All of these are mechanisms of enlistment, and some of them may be getting rusty.

Here are a few reminders of best practices:

- 1. For you** — Start with the person you know best: you. Just understanding that enlisting others is a part of your job as leader is a good place to begin. Next, it helps to have a specific context for enlisting. Do you want them to understand something? Give input on your idea? Lend informal support? Get actively involved? Give you resources to move forward? Each of these is a type of enlistment, but they vary considerably and the clearer you are about what you want, the more properly scaled your request and the more successful your ask. It is also important to be very clear about the overall aim and more immediate

About the Quick-Takes Series

This miniseries, part of the [Medicaid Leadership Exchange podcast](#), provides guidance to help Medicaid leaders during the COVID-19 crisis. The series, which includes companion videos and tip sheets, is developed in partnership with the National Association of Medicaid Directors and the Center for Health Care Strategies through support from the Robert Wood Johnson Foundation. For more information, visit www.chcs.org/quicktakes.

aim of your project. You also have wide ranging leadership style, and it is essential that you know what it is and that it differs from others. You might be a big picture person who is moved more by significance and impact than by details and process, wanting to inspire others to passionate commitments, not operational questions, and wrap it all up in a friendly and outgoing way of being with others. Not everyone is (more on this next). Beyond style you have a set of biases that are below the level of awareness. Working hard to grasp these or structuring work so that there is a check on them will help enlist others who may not have the same lived experience as you. Finally, you will be more effective the more authentic you are, and an important part of this is your comfort in the role of influencer. If you are leading, part of your job is influencing, so own it up front.

2. For them — You need to match self-awareness with a better understanding of those you are enlisting. In general, the dance goes like this: how do I see it, how do they see it, and how can I change how I understand, focus, and present the work in order to get them to enlist? (This includes adjusting your understanding and goals when needed.) First, it is best if you understand their goals, pressures, priorities, and limitations as they relate to the project or work you are aiming to enlist them to support. Just as you understand your style, getting a good grip on theirs is helpful. I like the following dichotomy as a quick check on styles, both yours and theirs:

- Big picture — Details
- Ends — Means
- Engaged — Reflective
- Critical — Positive
- Curious — Consistent
- Friendly — Challenging
- Sensitive — Secure

There are other dimensions, but this is a good place to start. Beyond style, there may be cultural differences between their group or organization and yours — this is collective style. What are those and how do you adapt to theirs? This should include any history, good and bad, that might have characterized work in the past. Finally, how does success in this undertaking accrue to their individual and collective benefit? This should be as nuanced as possible. For instance, the overall goal will serve their collective share of organizational success, but to be enlisted fully it will cost them on a shorter-term priority. Knowing this, you can make adjustments in the ask.

3. Common Ground/Relationship Capital — I have addressed the essential role of building common ground and relationship capital in other [places](#). But a word about these for distance work — whatever you have done in the past needs to be revisited, assessed, and reimagined. This will mean you are likely to spend a bit more time tending to this as we continue to work remotely.

4. Persuasion — At its heart, enlistment is in part about persuading others about something that they may not have invested in without your effort. There are some touch points for persuading in the new world to consider. Making something familiar goes a long way to having it accepted, but nothing is familiar today. Call attention to that fact and then try to adjust the format, background, decision process, and whatever

else is involved to resemble the past ways of doing things. Validating your proposal with the experience of peers or competitors is always a good step. This may be harder to collect these days, but worth the effort. Multiple touch points are a boon to successful persuasion. Contact with those you are persuading early and frequently helps grow their familiarity and comfort with what you are advancing. This is particularly powerful when it is accompanied with good listening. This may need to be accommodated with one-on-one Zoom meetings, followed up with email summaries of the discussion to consolidate your gains.

5. Don't be Dumb — There are a few things that do not help. Here is my short list of things to avoid:

- A hard sell up front;
- Dismissing the value of the compromise — most good things come this way;
- Thinking that everyone is equally essential — they aren't and many don't care;
- Seeing this as a one-time exchange — it is not and you need to build for the future;
- Don't hope things will get better on their own — they won't; and
- Being unable to forgive someone and then get back to the work of enlisting them in the undertaking.

Enlisting others is essential to influencing, making change, and leading. Doing so presents new challenges working at a distance, but also offers some new possibilities.

About Ed O'Neil

Ed O'Neil, PhD, MPA, is the owner of O'Neil & Associates, a management consulting and leadership development firm focused on change and renewal in the health care system. He was previously professor in the Departments of Family and Community Medicine, Preventive and Restorative Dental Sciences, and Social and Behavioral Sciences at the University of California, San Francisco, and director of the Center for the Health Professions, a training institute that he created in 1992. His work across three decades has focused on changing the US health care system through improved policy and leadership. To learn more, visit www.oneil-and-associates.com.

About the National Association of Medicaid Directors

The National Association of Medicaid Directors supports Medicaid directors in administering the program in cost-effective, efficient, and visionary ways that enable the over 70 million Americans served by Medicaid to achieve their best health and to thrive in their communities. To learn more, visit www.medicaiddirectors.org.

About the Medicaid Leadership Institute

The *Medicaid Leadership Institute*, an initiative of the Robert Wood Johnson Foundation led by the Center for Health Care Strategies, helps Medicaid directors develop the skills and expertise necessary to successfully lead their state programs in an ever-changing policy environment. To learn more, visit www.chcs.org/medicaid-leaders.