Influence Ecology

MAP Study Paper 7

Welcome to your seventh Mechanics and Practice Study. This program is reserved for those members of Influence Ecology who have successfully completed the Fundamentals of Transaction program, or other prerequisite study, and participation is by invitation only.

This program is a study in the fundamental science and practice of transacting powerfully in the marketplace.

INDEX

Materials Required 3

Study Worksheets 3

The Conditions of Transaction 3

Introduction to Building the Transaction for Satisfaction Metrics 4
Action into Results

Measures 5
Put Your Mask on First

Revenue Metrics and Profit Metrics 7

Building the Transaction for Satisfaction Metrics 8
The Thirteen Steps

Write Your Manual 9

Inventing the Transaction for Satisfaction Metrics 9

Satisfaction Metrics 9
Requests, Instructions, Demands, and Confrontation

Deliberate Practice 15

Your Brain at Work 16
By David Rock *16*

Influence – Science and Practice 16
By Robert Cialdini *16*

Program Measures 16

Materials Required

The following Books are required for this study:

The E-Myth by Michael Gerber

Influence: Science and Practice by Robert Cialdini

Your Brain at Work: Strategies for Overcoming Distraction, Regaining Focus, and Working Smarter All Day Long by David Rock

Willpower: Rediscovering the Greatest Human Strength by Baumeister & Tierney

Recommended Reading (Optional)

Flow: The Psychology of Optimal Experience by Mihaly Csikszentmihalyi

Study Worksheets

Studies will include Worksheets. Please download and save the Study Worksheet that accompanies each Study and follow the *Submission Instructions* outlined in the Worksheet.

The Conditions of Transaction

The FOT Program introduced three fundamental models designed to assist in the embodiment of complex systems - the *Conditions of Life*; the unavoidable and immutable conditions each of us are transacting to satisfy – the *Transaction Cycle*; the series of moves made in every transaction – and *The Thirteen Steps*; a means to think accurately about the architecture of a satisfactory primary transaction.

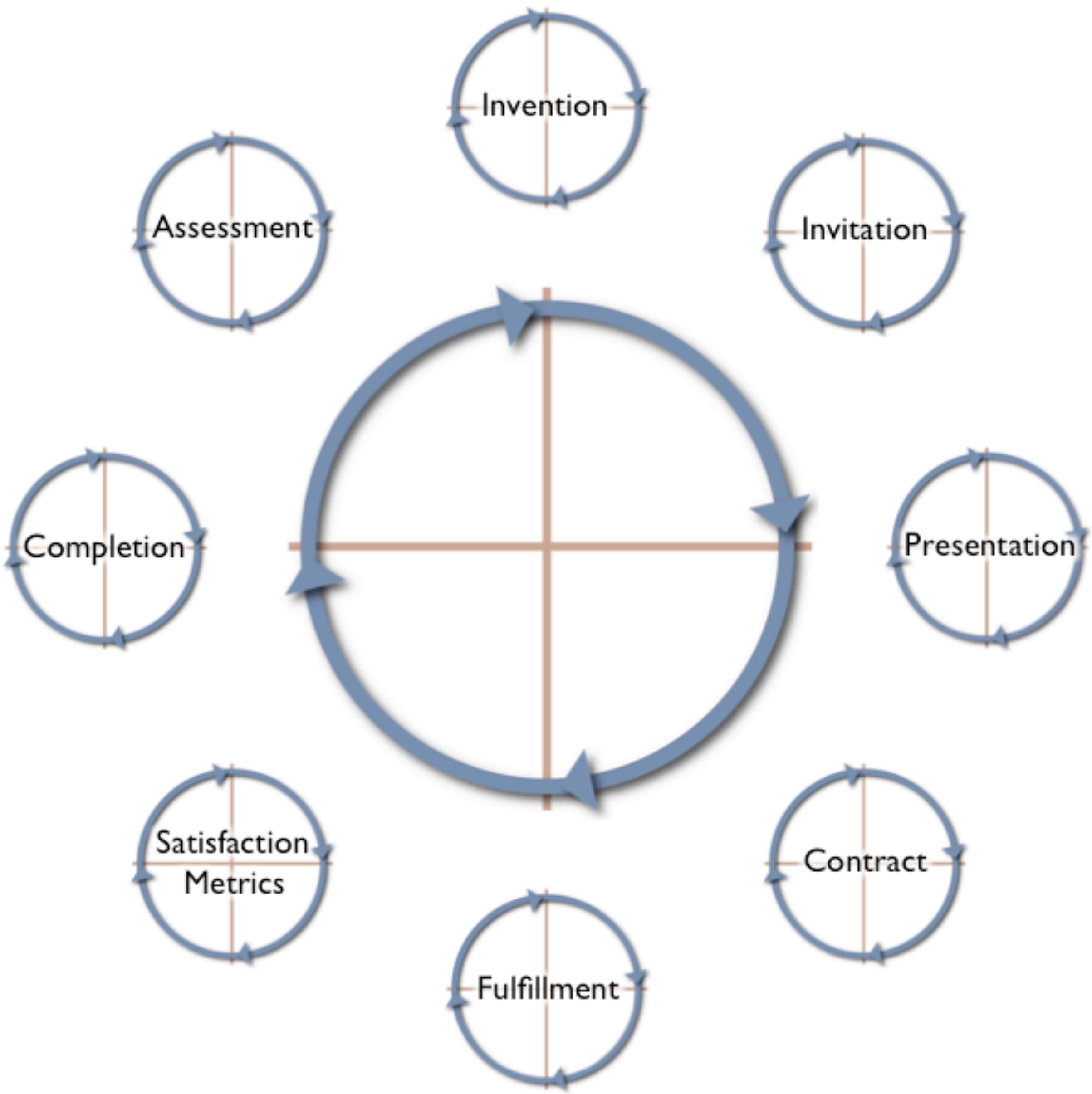
We will now correlate these by introducing *The Conditions of Transaction*; the unavoidable and immutable *Conditions of Transaction* that satisfy a primary transaction. **The revelation here is that each move in the transaction cycle is itself a transaction cycle.**

This program's focus is the mechanics of each Condition of Transaction (see diagram below).

We began in MAP Study 2 with the 'Condition of Transaction: Invitation' and with each Study Paper we will move clockwise around the Transaction Cycle. As an example, the articulation of the Condition of Transaction: Invitation for your own offer, will assist you in the:

Invitation of the Invitation
Presentation of the Invitation
Contract of the Invitation
Fulfillment of the Invitation
Satisfaction Metrics of the Invitation
Completion of the Invitation
Assessment of the Invitation and
(Re)invention of the Invitation

Each Condition of Transaction will influence your thirteen steps and vice-versa. Each Study will influence, build and focus your entire offer over the next year and for many years to come.



INTRODUCTION TO BUILDING THE TRANSACTION FOR SATISFACTION METRICS

Action into Results

Satisfaction Metrics are the compliance measures gathered from actions produced in the Fulfillment of each transaction.

If you don't measure it – you don't mean it.

The Satisfaction Metrics for your Primary Transaction are the compilation of *all* metrics produced in each Move and Phase.

These are the metrics we assign to the Moves and Phases in the cycle in order to capture the results produced from the actions taken (or not taken). In aggregate they make up the metrics that we will use later in the cycle to properly and effectively Complete the Primary Transaction and then accurately Assess it.

Satisfaction Metrics allow us to determine if we are on track to reach the aims intended for the Primary Transaction. If we are satisfied with the results Fulfilled on in the transaction, it should mean that we are 'on track' for reaching the aims we have.

It is important to distinguish that these are 'compliance metrics' that when accurately invented, deliberately processed and rigorously assessed, allow us to determine the effectiveness of each Move and Phase and ultimately the Primary Transaction itself. These are not the ultimate aims or goals of the Primary Transaction, but rather the specific intentions (or assumptions) that are first – planned for, and then measured against the actual results produced once each Move and Phase is Fulfilled.

For example, the Invitation Phase of the Primary Transaction was invented as a transaction. Satisfaction Metrics for a number of invitations were assumed or targeted, and then the execution of those targets will be met or not (by some measure). The same is true for Presentation and Contract. Once each of these transactions completes a specific plan for Fulfillment, the aggregate measures make up the Satisfaction Metrics for the Primary Transaction.

Accurate thinking is required when inventing (reinventing) the metrics of any transaction. Metrics must be determined (or assumed) during the Invention of the Primary Transaction and it is against these initial metrics that we measure and are able to assess our effectiveness in accurate planning, performance, productivity and satisfaction.

The purpose of Satisfaction Metrics is to ensure that each transaction meets with the satisfaction *you* require in order for you to fulfill on and have you reach your aims.

The Satisfaction Metric Phase of the transaction cycle is a purely *objective* domain. To be clear, this phase in the transaction cycle is not concerned with any narratives about 'what happened' that caused the results being measured but rather, it is only concerned with capturing, producing and reporting the measures (results). In this phase there is only concern for results. Good or bad, there can be no sensitivity or concern for why the data is what it is.

Simply put, the numbers, scores, grades, etc. are what they are – period. This requires an objective, black and white, yes or no ethic (best held by Producers and Judges) and any other view or commitment does not belong in the processes and practices associated with the Satisfaction Metrics phase of the transaction cycle.

MEASURES

The Mechanics and Practice program is an 'objective' program. Objectivity arises because 'concepts' are formed by a specific process and, as a result, bear a specific kind of relationship to reality. The objective approach to concepts leads to the view that, beyond the perceptual level, knowledge is the grasp of an object through an active, reality-based process chosen by the subject. Concepts (like any other mode of cognition) must conform to the facts of reality. [1]

Through the understanding and use of measures, you will demonstrate and prove your ability to invent and build effective transactions. You will produce – in reality – specific actions; and 'actions' will produce (or cause) results.

[1] J. Landauer and Joseph Rowlands 2001, *Importance of Philosophy* i/Introduction Text-

Measurement, according to objectivist philosophy, is the identification of a quantitative relationship, established by means of a standard that serves as a unit. The process of measurement involves two concretes: the existent (thing) being measured and the existent that is the standard of measurement. For example, one measures length in units of feet, weight in pounds, velocity in feet per second, etc.[2]

The epistemological purpose of measurement is best approached through an example. Consider the fact that the distance between the earth and the moon is 240,000 miles. No creature can perceive so vast a distance; to an animal accordingly, it is unknowable. Yet man has no difficulty in grasping this distance. What makes this cognitive feat possible is the human method of establishing relationships to concretes we *can* directly perceive. The distance from earth to the moon, expressed in miles, is reducible to a certain number of feet, and a foot is reducible to a unit that I can demonstrate and express by holding up a ruler. It works the same way in the other direction. A certain chemical reaction takes place in 4.6 milliseconds. A thousandth of a second is too small to be within the range of perceptual awareness, yet by relating this time interval, as a fraction, to one that we can comprehend directly, we can grasp and deal with it as well. *The purpose of measurement is to expand the range of man's consciousness, of his knowledge, beyond the perceptual level: beyond the direct power of his senses and the immediate concretes of any given moment... The process of measurement is a process of integrating an unlimited scale of knowledge to man's limited perceptual experience – a process of making the universe knowable by bringing it within the range of man's consciousness, by establishing its relationship to man*.[3]

Reduction is the means of connecting an advanced knowledge (knowledge we do not have today) to reality by traveling backward through the hierarchical structure involved, i.e., in reverse order of that required to reach the knowledge. 'Reduction' is the process of identifying in logical sequence the intermediate steps that relate to a cognitive item to perceptual data. This process is a requirement of objectivity.[4]

The idea of saving one million dollars becomes perceivable when reduced to a monthly dollar amount saved over a number of years; $2200 a month for 20 years or $3440 for 15 years or even $6110 over the next 10 years for example.[5] It is no different if you are losing weight or taking inches off a waist size, writing a novel, learning a new language or building a Primary Transaction.

Once the units are defined, it is possible to go the other direction and expand or scale the process to satisfy a current condition or accurately assess an outcome objectively. In other words if all that is available to save each month is $2200, the reality of your current situation is that it will take 20 years to produce a million dollars in savings. To behave as if $2200 saved each month will produce any other result is not objective.

Put Your Mask on First

It is YOUR aim that first must be articulated and planned for as you look to invent and reinvent transactions. A major error in planning (assuming any planning is being done at all) is that most business managers and generalists look at transactions from the common and flawed perspective of taking care of the customer first. The narratives perpetuated by The Current, those that espouse and ensure your success is a given or even "guaranteed" if you "just" or "simply" take care of the needs of your customer first, are simply incorrect. It sounds wonderful, but this kind of thinking is too general and it is unsound. The thinking that produced popular movements such as those that espouse that 'prosperity through positive mental attitudes', empowerment and even new age "laws of attraction" for example - are steeped in a dangerous mix of ignorance, naivety, hope, and modern mysticism. Where there may be a beneficial place for these ethics and beliefs; and we acknowledge that many people find great strength and help in

[2] Ibid
[3] L. Peikoff 1991, *Objectivism* (Meridian)
[4] Ibid
[5] Assumes monthly contribution with an annual yield of 6%.

their personal life and development through these notions and discourses, they are of little value in the objective domain of marketplace transactions. For sure, they are of no help at all in the development and application of gathering, producing and reporting results in transactions (Satisfaction Metrics).

The instruction given to you on any commercial airline flight about putting your oxygen mask on first before attempting to help anyone else applies here as well. You must invent and build the metrics that measure your satisfaction in order for the transaction to support your aims in life.

You are not building your business enterprise or career for your customer – you are building it for you. You are building the transaction to take care of yourself, your family, your concerns; *your Conditions of Life*. You must know what each transaction must satisfy for you – first – then build the metrics that must be fulfilled to satisfy the balance of the transaction for the customers that are appropriate and can satisfy the obligations they have agreed to.

Revenue Metrics and Profit Metrics

It is useful to consider that the front-end of the transaction cycle – the Moves and Phases that exist from Invent through Contract – as moves for the production of revenue. Likewise, it is valuable to consider the backend of the cycle – the moves and phases from Contract through Assessment – as moves for the production of profit.

Revenue production is generated and caused through the actions taken in the Moves and Phases of Invitation, Presentation and Contract. These are Moves that are required to produce money. Those who hold the roles in the Moves Invent and Present, (ideally Inventor and Performer personalities) and those accountable for the Fulfillment of Contracts (ideally Producer personalities) need and must be held to specific measures that satisfy the overall demand for revenue in each transaction. As they Fulfill on the obligations of their accountabilities, metrics are captured and accumulated as part of the Move Fulfill in the Satisfaction Metrics phase of the Primary Transaction.

Profit production is generated and caused through the actions taken in the Moves and Phases of Fulfill, Satisfaction Metrics and Complete. These are Moves that are required to satisfy the obligations (promises) of each transaction. Those accountable for the Fulfillment of these Moves and Phases (ideally Producers and Judges) must be held to specific measures that satisfy the overall delivery of the obligations to the satisfaction of the enterprise, and the customer; and they must do so with specific measures that ensure each transaction is profitable.

When each transaction in the enterprise is invented properly, metrics for the satisfactory production of revenue and profit are established. Do you know if your transactions are profitable?

The person(s) accountable for Satisfaction Metrics is almost always the person who holds the role of financial accountability in the company (Judge). It is incumbent upon them to work with those accountable for Fulfillment in each Move and Phase to ensure that the results from each are captured and reported accurately.

Internal Customers

As the transaction moves from Fulfill to Satisfaction Metrics the focus becomes almost exclusively aimed at the organization itself. Though the use of the metrics realized in the performance of the enterprise may be varied and available as evidence, proof, social proof and other representations in efforts aimed 'outside' the enterprise, almost all aspects of the transaction for Satisfaction Metrics are built for internal use.

With this in mind it is useful to relate to the 'customer' as those with whom you are transacting internally – we refer to them as 'internal customers' or 'team members'. These are your co-workers, your boss, your fellow board members, your employees and to some degree strategic partners, vendors and the like.

As you speculate and invent the transaction for Satisfaction Metrics, you are building it for your management team and internal customers. Your invitations, presentations, agreements (contracts) and plans for fulfillment for the capture, production and reporting of the measures of each transaction (collectively your Primary Transaction) are to be designed, made and implemented for your internal customers to use to produce the facts about the transaction. It is on these facts that assessments are made and narratives are reinvented or not.

<u>Organization and Structure for Satisfaction Metrics</u>

The work required for you to build the transaction for Satisfaction Metrics will depend a great deal on how detailed and thorough you approached this Phase in your Worksheets so far.

Simply put, the Work you will do in this Study will be to organize the Satisfaction Metrics you have articulated and built for each of the previous Moves and Phases into a coherent operations manual.

If you are working in teams and have members who identify themselves as a Producer or a Judge, the work in the Transaction of Satisfaction Metrics should include (if not be led by) them.

BUILDING THE TRANSACTION FOR SATISFACTION METRICS

The Thirteen Steps

Through the use of the Thirteen Steps, you will expand your thinking of this Move or Phase as a transaction. You will see new ways of thinking about the transactions you have already worked on in this program.

The Work you do in this Move or Phase will have you consider the Work you have done in the previous Moves and Phases – adding language, tactics and practices that will support moving your Primary Transaction more effectively through this Move. This will continue throughout the process of your Work in MAP. As you continue to consider this transaction for Satisfaction Metrics, you will return to this Move and expand on the overall Plan for your Primary Transaction. It is likely that you will be inspired to return to your previous Work and edit or reinvent some of the Moves and Phases.

Keep in mind that it is not our aim to "get it right" nor are we in the pursuit of "perfection" at this point in our learning. Simply apply what you know now, to the best of your ability, and do so deliberately. Uncover the General and Specialized Knowledge that you must learn to transact powerfully in this area of your Primary Transaction. Watch your moods, attitudes and states of mind as you do this important work of Invention. Do not brood, be annoyed, irritated or frustrated as you see the distance you must traverse to reach your aim in this area. Simply allow yourself to learn. Keep in mind this is a game, like (water) drops on a penny, and games can be learned.

The Mechanics and Practice Program teaches that each Move and Phase is in and of itself its own transaction.

Every primary Move and Phase is a transaction that requires careful consideration and use of the Thirteen Steps. Your understanding and ability to apply the Thirteen Steps will be demonstrated throughout the program as you become more and more related to the fact that we are always transacting and all transactions are built on the same fundamentals. The Thirteen Steps to Building Your Primary Transaction is the spine of our work.

For this Study you will complete the Thirteen Steps for Building the Transaction for the Move Fulfill and Invent the Transaction for Satisfaction Metrics.

Write Your Manual

Keep in mind that the purpose of this Work is to guide you in the articulation of the action required to produce effective and powerful transactions. You are doing the work that will allow you to write your manuals for each Move and Phase in your Primary Transaction Cycle.

In this study you will be introduced to the distinction 'Simple Transaction'. A simple transaction requires a kind of thinking that we call *single action* or *next action* thinking. Single action thinking is highly objective and built to support and facilitate the design and construction of well articulated operations manual described in the work of Michael Gerber's book The E-Myth. Keep these structures in mind as you move through your Work in this program.

Inventing the Transaction for Satisfaction Metrics

The Worksheets will guide your thinking and planning as you consider the Invention of the Phase Satisfaction Metrics as a transaction.

Some of you will have *Specialized Knowledge* that goes far beyond what we recommend in some areas, and others will recognize that this introduction to certain distinctions, principles, practices and disciplines is insufficient for your current aims, and you will need to seek additional specialized knowledge and/or professional help.

Use this Study and the Worksheet to inform your thinking subjectively and to help you produce the articulation required to move objectively. This is your Study – make it your own.

Satisfaction Metrics

Requests, Instructions, Demands, and Confrontation

The principal activity required of anyone accountable for the Satisfaction Metrics of any Transaction is the ability to capture and organize the results produced by others as they Fulfill on the Work required in the transaction. This is accomplished through the use of Requests, Instructions, Demands and Confrontation.

For the most part, Satisfaction Metrics are reported by internal management and other team members – to internal team members. However, some interaction will exist (depending on the nature of your offer) with your external customers – and these activities are almost always related to 'performance and fulfillment evaluations and feedback. Be sure to consider where you are in your transaction cycle as you look to make requests of external customers. Be sensitive to the fact that external customers hold different concerns than internal customers.

Requests are speech acts, they are the act of formally asking for something where the recipient of the request may accept, decline or counter. Most requests in this Phase are made for another person(s) to take an action. Requests may be accepted, declined or countered but in this Phase they generally carry a more forceful, rigorous and deliberate mood as well as stricter terms than requests made in earlier Moves and Phases. Requests, more often than not, are not crafted or presented such that they elicit counter offers, but rather, tend to be received as opportunities to act or not. As in the Move Fulfill requests made in the Satisfaction Metrics Phase of the cycle will more often than not be requests of others to take action by a certain time and at a certain standard. As a result, requests are often assessed or viewed as agitating, negative, costly and difficult to decline.

Instructions are commands describing to another person how something should or ought to be done. Instructions leave little or no room for responses or interpretations from the recipient. Instructions, when properly presented, do not produce an opening for discussion regarding the 'nature' or intent of the command, but they do produce openings for the recipient to confirm their understanding of the instruction. Recipients of instructions should be able to clearly reiterate and articulate the act(s) required for the objective fulfillment of the instruction, including terms and conditions as well as consequences (if any). When teams distinguish an instruction from other speech acts, they can quickly prepare their attitudes and form their actions effectively.

A demand is an instruction with specific consequences that will be levied if not fulfilled to term and condition. Demands in Satisfaction Metrics carry a more instructional rigor and 'lead' with consequences. They are Presented with the consequences clearly articulated if the terms and conditions of the demand are not adhered to and, when required, generally produce negative moods due to their restrictive nature. Demands and instructions are two sides of the same coin and the distinction is important to effectuate speed of transaction. The difference lives in how one builds the narratives of importance and consequence for the recipient. When demands are made, it is critical to make the objectivity of the consequences known, real and immanent. Instructions tend to leave room for teaching and learning, feedback and interaction; demands do not.

Moods and attitudes of confrontation are required for the effective capture and coordination of metrics. Satisfaction Metrics are the 'results' of the Work done in each Move and Phase of the transaction cycle and if they are to be useful and valuable to the organization, they must be made by someone who holds the jurisdiction and authority to make demands and produce consequences. These kinds of moods are best exemplified and executed by the personality we lovingly know as Judge.

In the day to day activity of most business organizations, we find that the process for managing and coordinating the actions required to collect, produce and report satisfaction metrics do not adhere to the fundamentals of transaction. In the typical situation, those accountable for Satisfaction Metrics do not make Invitations or Presentations, complete commitment agreements (Contracts) or follow up on them, but rather set policy, and opt to confront internal team members with mandates and obligations. This is a mistake. Like every transaction, Satisfaction Metrics go through the same Moves and Phases and when applied effectively, help move transactions quickly and produce good and proper attitudes and effective action. With a firm grasp of the fundamentals of every transaction, a competent manager can build and invent transactions in this Phase that confront the collection, production and reporting of results in an effective and proper state of mind, while consistently producing appropriate moods and attitudes for their internal team members and/or customers.

Invitation for Satisfaction Metrics

An Invitation is a form of an offer that is extended to a *specific customer* where the result is the acceptance or the decline to hear (attend/receive) a formal Presentation – in this case a request, instruction or demand.

When anyone, and this is especially true for Judges, considers making a request or demand of someone, they almost never consider that it is most effective after it follows the appropriate moods of Invitation and Presentation. If any thought is given to this, it is likely thought of in terms of 'manners', or at best, 'sales tactics'.

An important aspect of setting the appropriate and proper mood for the acceptance and compliance of a request, instruction or demand is to consider inventing an 'Invitation' first. When the Invitation is carefully and thoughtfully crafted, it allows for an initial acceptance on the part of the recipient (internal or external) to recognize the sensitivities you are bringing and/or requesting them to consider. If allowed to be 'invited' into and accept the importance and objective nature of the metrics that must be captured, produced and organized, the recipient is prepared for a presentation of the request, instruction or demand.

The Invitation made in the Satisfaction Metrics Phase, is an offer made to an individual to receive a formal Presentation of the request, instruction or demand. It is an important step in the process for supporting the shift of mood and attitudes as your Primary Transaction transitions from the Move Fulfill (production) into Metrics (results). By making an effective Invitation to 'hear or find out more about a request', you begin the process of establishing a level of importance and trust in your processes and ability to transact. You assess the mood of the listener and can begin the process of moving the listener into proper moods if needed. When recipients accept the importance of accurate thinking, and understand the consequences of their behavior and actions (personally and to the organization), the need for high-cost confrontations is reduced.

When you consider an Invitation in this Phase, you take yourself out of the black and white, objective and often skeptical nature, moods and attitudes that dominate the domain of Fulfill (Work) and Complete (Facts). With this perspective, you are better able to consider the subjective narratives required to produce the moods that inspire those 'subjective personalities' found in the high-side of the transaction cycle who see your actions as potentially threatening to their creativity, identity and/or freedom. You look to apply weapons that gain you favor, produce excitement or agitation in order for your Invitation to be heard and complied with quickly. In most cases we are simply setting the proper state of mind, mood or attitude for someone to 'hear' a request, instruction or demand properly. When people are in the proper and appropriate mood to hear them the likelihood of effective and complete compliance is high.

<u>Presentation (Offer) Satisfaction Metrics</u>

Prepare for each Personality first, and then plan for the Transactional Behavior of the individual.[6] Because we are now dealing with the more 'confrontational' nature of requests, instructions and demands, we offer the following review and primer to assist in preparing your Presentations in this Phase for each of the Personalities we study.

Consider what kind of response or reaction your Presentation of requests/demands might insight and prepare for it.

Consider that requests, instructions and demands, by their very nature, generate Work on the part of the recipient. Work requires the use of the mind and body, and moving and thinking uses up energy, time and resources. Any highly complex request is best served up after an Invitation to receive it has been made and accepted.

Presentations are most effective when the maker considers the Personality and Transactional Behavior of the recipients. The 'language' of the personality must be considered. Study the 'linguistic' orientations of each personality. As always, it matters whether or not you are speaking to an Inventor, Performer, Producer or Judge and each will almost always have a default response to major and significant requests, instructions or demands. To prepare for, and if need be counteract, these initial 'default' responses, you will need some 'space' for them to work through their biology. This is accomplished during the Presentation of your requests, instructions or demands.

Your most difficult personalities in this phase of the transaction are more likely to be Judges and Performers.

---

[6] Keep in mind that we study Personalities as a group dynamic and assert that one can observe common behavior and habits in groups or specific ecologies. Transactional Behavior is a descriptive distinction we use for the habits and actions taken by an individual. Groups or 'ecologies' are more predictable than individuals.

Judges will almost always say “No” first so be sure to expect and plan for an initial ‘no’ reaction. Remember that Judges say “No” but it really means “Maybe”. They say “No” until they figure out how something ‘can be done’. They are typically not concerned with protecting the relationship but rather first and foremost will want to see that ‘they’ are taken care of (their concerns are taken into account) then they will move to take care of the concerns of the organization or transaction. Allow them the ‘space’ to express their negative reaction. Remember, this is their way of ‘working out how it can be done’ and they do their best work when they are able to ‘confront’ the facts. By ‘confront’ we do me confrontation – not just the act of reflection. Judges will be “just in time” with almost any deadline, so like Performers, it is a good idea to construct a flexible reporting schedule for them to choose from; even go so far as to give them a slightly earlier deadline to meet than you need. They will almost always have edits and fixes so prepare for them. They like games too, but you just can’t tell by their attitudes. Once they figure out how something works for them, and then for the good of the collective – they move objectively and in good moods.

Make the Presentation to Judges verbally and then make sure you present ‘in writing’ the terms and conditions of the request, instruction or demand for them to take away and reflect on.

Finally, they prefer to be known publicly as competent and helpful. They seek to make an impact. Confrontation is a form of ‘impact’. This is what they seek in terms of their public recognition.

Performers will attempt to produce a good mood in order to ensure the ‘relationship’ survives the Presentation – let them. Be sure to tie their obligations in your requests or demands to their concern for your personal interaction (business relationship) and you are halfway there. Be sure to include their relationship to the organization as well. Remember that they care for ‘others/others’, that means You and all others (company and customer relationships). If you are smart enough to produce a ‘game’ that allows them to ‘think’ they have some freedom in their obligation (to report by a certain day/time for example) – you will almost certainly get what you want. Finally – remember that Performers tend to confuse ‘flexibility’ with ‘freedom’, so allow them some ‘room’ in their obligations and reporting of the metrics you are requesting. We do not recommend ever ‘telling them what to do’. Performers will not be dominated. Have them make public promises that if not met cost them relationship and freedom.

Give Performers an opportunity to look like a Hero – (self sacrificing for the greater good) and from time to time acknowledge them publicly for their unselfish commitment to You and all others. Make it a game, make it fun, and you win.

Inventors prefer certainty and Producers prefer consistency. You won’t have much trouble with them accepting the terms of your offer. They will both have criticisms about the processes, lack of detail and the procedures, so involving them in the ‘procedures and format’ of the transaction when you invent them is a good idea.

Make sure you focus the Presentation on and make it about the Inventor; allow them to work through their initial concerns about ‘knowing’ you were going to make the request you are making. We recommend saying “I know you know this…” pretty much anytime you are about to challenge something an Inventor doesn’t know.

Producers like structure and rigor. Make your request objective and you will be happy with the result.

<u>The Contract of Satisfaction Metrics (agreements from others to report results)</u>

The Contract Phase in Satisfaction Metrics is simply meant to represent the listener’s understanding and consent to the terms agreed upon when others comply with your requests. Any (even quick and simple) written response or follow up to requests that are accepted, ensures that the terms and conditions of the request/demands are clearly understood and will be met. It is an essential element in making and completing important demands, as it is a representation of your compliance with others.

Make it a practice, when you invent transactions for Metrics, to follow up in writing. Email or quick thank you notes or internal memos that include the agreed to terms of major requests work very effectively. These moves will also serve to support your efforts in the case of disputes or misunderstandings – like any commitment, agreement or Contract – you will return to them often. If they are written, you will win more often than not.

This goes for internal and external customers to Satisfaction Metrics. It can support or diminish your identity or transactional behavior, as well as demonstrate a level of professionalism and capability to organize the effort of others by confirming the conditions to be satisfied when requests are complied with.

Much of what we are addressing is pointed at internal transactions. But keep in mind that we are specifically pointing to elements in the gathering of, or organization of, information and facts about 'what has occurred' in the transaction thus far and this will also pertain to your external customers. The Contract for the Primary Transaction that exists between you and your external customers, holds all kinds of obligations, terms and conditions - but may not define in detail the specific kind of formats, dates and times, or other specific measures that you will want to capture. The organization associated with capturing results is critical and you will need to make many requests and demands as conditions change over the life of long term and highly complex transactions. You will have to refine and sometimes amend agreements to correspond with new realities. You may have to enact certain clauses in the Primary Contract because of defaults or mistakes made by your Customer. When you do – you will need to be rigorous in your follow-up and execution of new commitments, amendments or agreements to act.

The key in this area (for all Moves and Phases) is to always capture promises and commitments to act and do it in writing. Even those that at first may appear small and insignificant should be followed up with a confirming email or note.

Fulfillment of Satisfaction Metrics

Any Work that is required to capture, produce and report metrics of the Primary Transaction is done in the Move Fulfillment inside the transaction for Satisfaction Metrics.

The Work you will do in Fulfillment of the Satisfaction Metrics for your Primary Transaction includes the Work you invented in the other Moves and Phases for capturing, producing and reporting Satisfaction Metrics. The systems and structures for organizing and facilitating all of the action required to produce effective action is considered here.

You have speculated on and have begun to Invent certain Satisfaction Metrics in the previous Moves and Phases. Any Work is coordinated here.

The Satisfaction Metrics for The Primary Transaction

All of the compliance metrics are captured, produced and organized for reporting in this Phase of the Primary Transaction Cycle. The specific systems and formats used to capture all of the metrics related to the Primary Transaction will depend on the nature of your offer and the needs and demands of management. Specialized knowledge in this area may be required depending on your offer with the following elements as a primary concern:

Capture – the effective action needed to facilitate the collection of the important and relevant measures in each Move and Phase.

Organization and Production – the Work associated with coordinating the information and facts and creating a physical articulation and demonstration of the results of the transaction.

Reporting – the presentation of results to management in order for them to draw conclusions and assessments to produce the FACTS about the Primary Transaction.

Generally speaking, this Phase is simply a collection or aggregate phase where all of the important results are captured, organized and reported in order for management to make conclusions and determine compliance. These are the results of the actions taken (or not) in the Primary Transaction. These results are simply a report on what occurred or did not occur according to the assumptions, projections, targets, objectives, plans, etc. in each Move and Phase.

It is from these results that facts will arise as to the effectiveness of the transaction. It is on these results that all assessments and decisions will be made in order to Complete the transaction (turn results into Facts).

The purpose of this Phase is to capture and report results from each of the previous Moves and Phases in the cycle. Satisfaction Metrics are compliance measures. The metrics for the Primary Transaction should be collected on a periodic basis and as often as needed depending on the nature of your offer. It is most useful to gather and report metrics on a regular schedule.

The Phase – Satisfaction Metrics – will have specific reporting metrics to hit as well. In your design and Invention of the transaction for Satisfaction Metrics you will need to account for reporting the overall metrics of the Primary Transaction to management in order to Complete. Your Satisfaction Metrics for Satisfaction Metrics are also included in your results.

<u>Satisfaction Metrics - Complete</u>

It is rarely taken seriously and as a result, many opportunities for the expansion of personal or departmental identity, authority, commitment and consistency, are left unattended and wasted in this Move as with the other Moves and Phases.

Formal demonstrations of the Completion of any transaction are as appropriate and important for internal customers as for external customers.

Recognition and appreciation should be demonstrated to all who comply with requests, instructions and demands when appropriate. The move should be consistent with the nature of your offer and/or industry, and appropriate to generate the proper moods, ethics and intent for your overall goals for the Primary Transaction.

Depending on the nature of your offer, demonstrations of Completion can be as simple as a thank you note, evaluation form, personal call, or as elaborate as a gift, social occasion or formal Presentation of acknowledgment.

For example, it is the practice of the leaders of FOT Virtual Classrooms and study calls to express our thanks and appreciation to our customers who comply with our requests for evaluations and feedback. Notes, gifts and public acknowledgments of appreciation and gratitude for help in the area of reporting results is a commonplace practice and we make a big deal at Influence Ecology about thanking people for their help in this area. We have noticed that when we do this publicly, it inspires others to comply when asked to do the same in the future. We also see that it tends to agitate those who declined or ignored our requests for evaluations and feedback – eliciting apologies and new promises of compliance in the future.

We regularly agitate the indifference of customers who ignore our requests for feedback, and act swiftly to levy consequences when commitments are broken.

We tend to move quickly to accept declines, requests for removal or revocations of mutual agreements and recommend that you do the same. For example, if we receive an email that indicates a student intends to or is considering quitting or reneging on an agreement, we act to accept their request right away. In most cases we find that we avoid high-cost and high-maintenance transactions by taking this action. We often find that if the customer or student misspoke or recognized an error in thinking, the quick acceptance and threat of loss agitates them sufficiently and they contact us to cure the misunderstanding or breach. Accepting declines early and quickly is a dignified and respectful move of power.

The important consideration is that you take an action that is appropriate to your offer, one that preserves future opportunities with those you may want to involve or transact with again, and produces a sense of clarity and completion for yourself and those with whom you do not intend to make future Invitations and Offers.

The overall goal in the Move Complete – in any Move or Phase – is to leave the transaction with no further action to take, other than to move into the internal Assessment phase for yourself and/or with your team.

Assessment of Satisfaction Metrics

All questions about the process and effectiveness are considered in this Phase.

What tactics, weapons and strategies are most effective in producing compliance through the Moves and Phases of the Transaction?

What is missing in the processes?

Which processes, requests or procedures caused the most agitation or confrontational reactions?

What worked or did not work in the Phase of Satisfaction Metrics from the processes of capture, production and reporting?

As a transaction itself, does the Plan and execution for the capture, production and reporting of Satisfaction Metrics support the intentions of the Primary Transaction and move the transaction forward quickly and effectively?

What aspects or elements of the Phase or the written agreement itself need to be assessed for Reinvention?

These are the types of questions to Invent for the Assessment of any Transaction. In all cases, once the Transaction is Fulfilled, Satisfaction Metrics are captured and the Transaction is Complete, it is then Assessed and continues as is or is reinvented or exhausted. This is true for the Transaction for Satisfaction Metrics as well.

Deliberate Practice

Deliberate practice is characterized by five essential and necessary elements, which are:

1. Designed specifically to improve performance
2. Repeated a lot
3. Feedback is continuously available
4. Highly demanding mentally, and
5. Not much fun

This program is designed to support the Deliberate Practice of Study and application of the Fundamentals of Transaction.

If you have not committed these five elements of Deliberate Practice to memory and can articulate your understanding of each as it pertains to your Primary Transaction – it is unlikely that you are applying them consistently. You must be able to speak them before you can act them.

Your Brain at Work

By David Rock

Consider what you have learned about your brain and how to apply it as you Invent your transaction for this Phase.

Influence – Science and Practice

By Robert Cialdini

Embodying the Weapons of Influence means that you understand, can apply and are able to correlate them to situations and circumstances to gain the compliance of others.

You will be asked to demonstrate their use throughout this program. Refer to and use the book as you consider Inventing your Transactions for this Phase.

Consider how each weapon can be utilized as you make requests, give instructions or make demands of others to take action. Use the weapons to gain compliance in the accumulation of the metrics you require.

Program Measures

If you have any question or concern regarding any aspect of the program measures please contact us during this Study to ensure their accuracy.

Concentrate. Breath. Make invitations, offers and requests. Transact Powerfully.