

Structured Engagement & Influence

Applying conversational flow, reciprocity, and authority systematically to referral partners, buyers, regulators, and internal stakeholders.

Influence is a process, not a talent. Organizations that grow reliably run their relationships on the same discipline they apply to their financials.

THE ENGAGEMENT SYSTEM

- Segment relationships by value and set a contact cadence for each tier
- Lead every contact with something useful before anything is asked
- Log every meaningful interaction where the whole team can see it
- Review pipeline and referral sources on a fixed monthly cadence

PRINCIPLES APPLIED

- Reciprocity: give the referral, the data, or the introduction first
- Authority: publish what you know; expertise must be visible to count
- Consistency: small agreements precede large ones
- Social proof: outcomes from peers outperform claims about yourself

COMMON FAILURES

- Territory coverage assumed rather than measured
- Referral relationships owned by a person instead of a system
- No defined next step at the end of a promising meeting

Kane S. Sherman, MBA · Senior Management Group, L.L.C. · Starline Leadership
Kane@starlineleadership.com · (405) 361-5241 · www.starlineleadership.com
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