

Duncan Green

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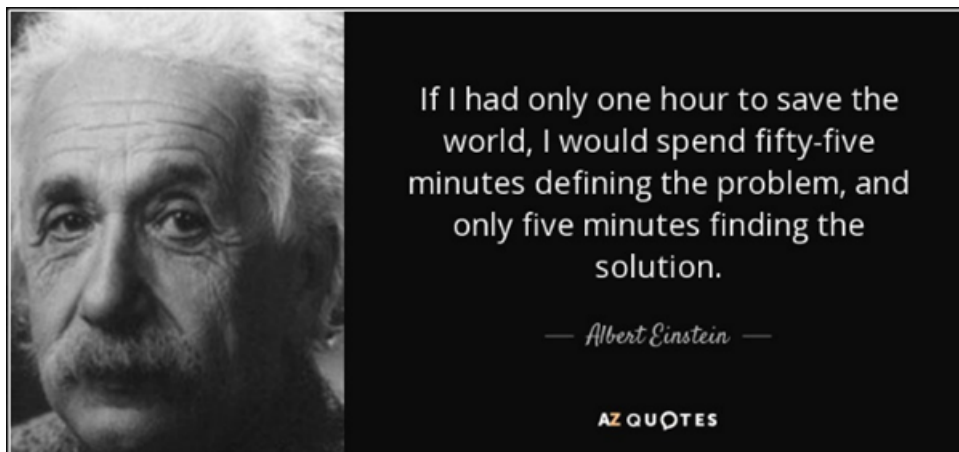
Here's our emerging eight-step path to a decent influencing strategy – what do you think?

Something like a 'core curriculum' on influencing is emerging at the heart of our Activism, Influence and Change programme. This week I tested and tweaked it further in a two day workshop with 30 health activists from across China and Southeast Asia, who I'd previously worked with in London (see this [July post](#)).

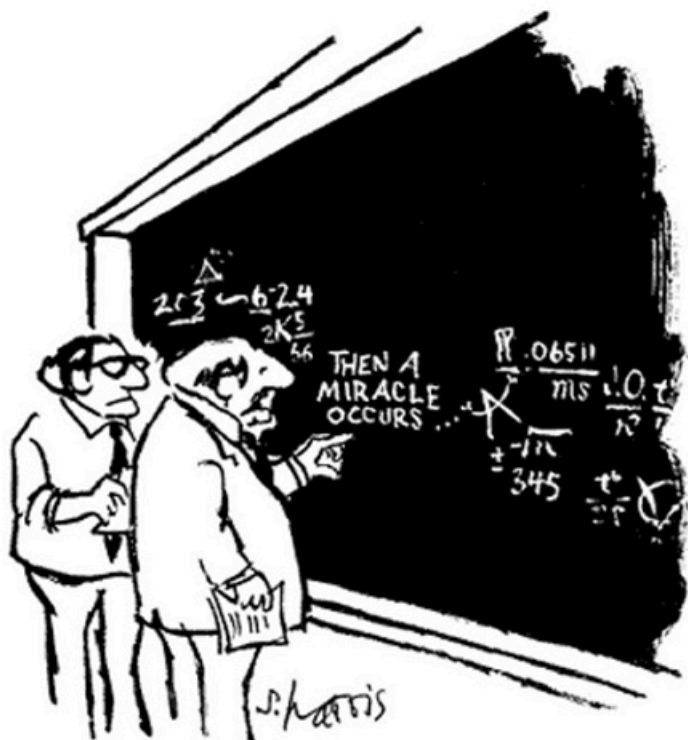
They are fellows of the [Atlantic Fellows Health Equity Initiative for Southeast Asia](#), and like several other such influencing leadership courses we work with, they receive a combination of teaching, mentoring, peer exchange and the chance to submit proposals for an influencing project for funding at the end of the course. I was there to help them start building those proposals.

Reading their short initial concept notes on the plane, I was struck by their commitment, passion and the breadth of experience and tactics – the fellows include medics, government officials, NGOs and campaigners and even one stand-up comedian.

But I also noticed some recurring gaps and weaknesses, familiar from our other courses, including the one we teach at LSE. I fed these back with 3 of my favourite images (apologies if you've seen them a hundred times before!)

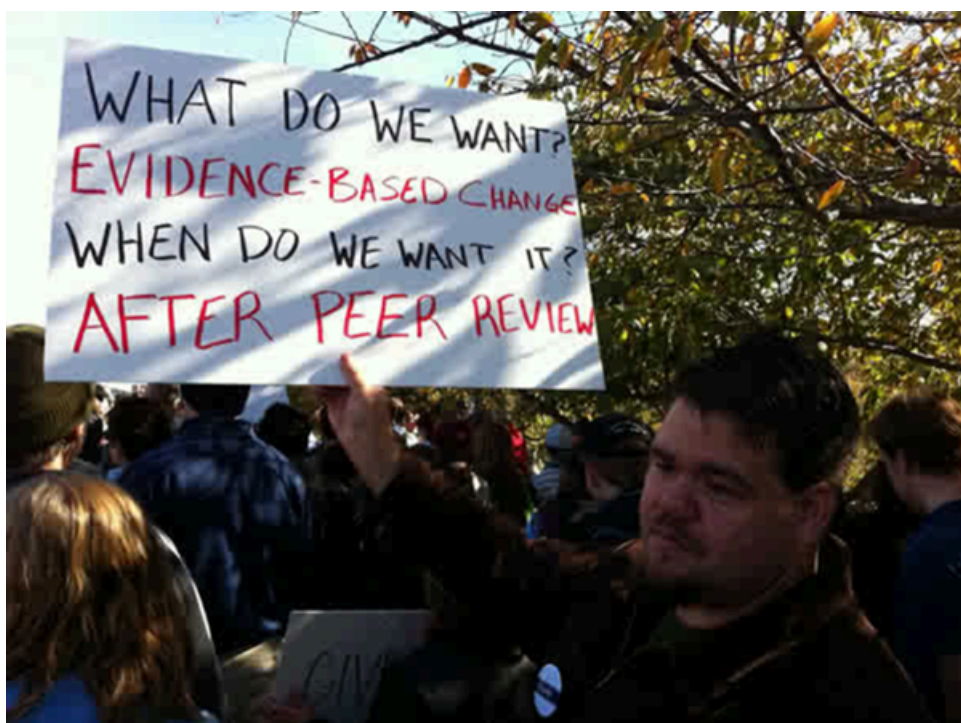


The quote that Einstein never said, but is so good that I keep using it. Too many of the proposals leap straight into 'what do we do', rather than spending time digging into the problem in search of 'points of entry' that might stand a chance of winning *and* have a significant impact.



"I think you should be more explicit here in step two."

The miracle cartoon: Many of the proposals boil down to something along the lines of 'we will talk to a bunch of people at the grassroots and they will force the government to change its policy'. Without a lot of accompanying power analysis, a lot of those assertions remain unconvincing.



The march for science placard: Those proposals centred on research still tended to think the evidence will speak for itself. Good luck with that.

In response I suggested they put their proposals to one side, go back to the beginning, work their way through from defining the problem to arriving at a set of tactics that reflect a serious attempt to understand the power and politics that underly stasis and change, and then use that to sharpen up their proposals. It was hard work (one participant said they had a recurring feeling of 'being lost, then found, then lost, then found again!'). But it was also a lot of fun (at least for me – I haven't seen their feedback yet). **Here are the slides** – feel free to nick some/all of them.

Based on the slides, here's the eight step process we ended up asking them to follow:

1. Start with a clear problem statement: what is the problem you want to influence? That might need some digging down into your initial idea, eg via the '**5 Whys**'. There's some great ideas in the PDIA toolkit that I'm going to have to pull in here.

2. Unpack the problem, using a **fishbone analysis**, **process map** or other way of disentangling the different causal factors that could maintain or solve the problem –

Head of the fish (problem statement): a clear, shared definition of the equity problem.

Main causes (rib ends): identify the primary drivers (e.g. **PESTLE** categories).

Contributing factors (smaller ribs): focus on **how** and **why** something happened, not **who** is responsible. Include systemic causes as well as knowledge/skills/attitudes/beliefs and behaviours/practices. Keep asking "why" until you've surfaced causes that explain most of the problem.

3. Identify one or two points of entry for your intervention, with a rationale for your choice, then turn them into **SMART asks**.
4. Research and map the stakeholders relating to that point of entry
5. Use some power analysis tools (e.g. the **Power Cube, Rao and Kelleher** or **Rowlands' four powers**) to shape your overall strategy, e.g. the balance of insider v outsider, or whether your main target is

social norms or policy

6. Come up with some fun, innovative tactics, and show how they follow from your strategy and stakeholder mapping

7. Turn your tactics into a series of 'if we do A we will achieve B' statements, then identify and test the assumptions behind the arrow of $a \rightarrow b$ ('then a miracle occurs')

8. Say how you plan to deal with surprises, including when you learn new stuff about the system you are trying to influence.

I must confess to some unease about how prescriptive this is becoming – some of the participants started focussing on ticking the boxes of the various tools, rather than using them to provoke discussion and new ideas. However, the feedback we have had from practitioners in a huge range of contexts is so positive that I am running with this kind of structure, at least for now.

But this is (cue vomit emoji) a 'living document'. It will doubtless evolve further, so I'd welcome your thoughts on how to improve it.

About the author

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