

Worksheet: Applying Principles of Persuasion and Influence

Use this worksheet to identify and apply timeless strategies from Robert Cialdini and Dale Carnegie. Each principle includes a simple definition, a real-world example, and sample language you can adapt for your own use.

Keep this worksheet handy when prepping for meetings, proposals, or collaborative work sessions. You don't need to memorize these principles—you're probably using many already. The goal is to become more intentional about how and when you use them.

Cialdini's 7 Principles of Persuasion

Reciprocity

People feel obligated to return value when they've received something helpful first.

Example: Share a tailored insight, relevant data, or practical tool with no expectation of immediate return.

Say: "I pulled this chart from a recent industry report—it might give you a clearer picture of the current trends. No strings attached."

Commitment and Consistency

People like to follow through on things they've already agreed to—especially in public or formal settings.

Example: Ask for a small action (e.g., scheduling a follow-up, reviewing a sample) to begin a pattern of engagement.

Say: "Would it be helpful if I sent over a short summary for your team to review before our next discussion?"

Social Proof

We tend to look at what others like us are doing when making decisions.

Example: Reference how similar teams or clients addressed the same problem or implemented a similar plan.

Say: "I worked with another department facing the same issue last quarter. They found that a phased rollout helped them avoid overwhelm."

Authority

People trust and follow those who demonstrate credibility and expertise.

Example: Quote real numbers, respected studies, or industry facts. Speak from experience with confidence.

What not to say (Persuasion)

Here are a few phrases that can work against persuasion, even if well-intended:

- "Like I said earlier..." → Can come across as condescending or impatient.
- "This is just common sense." → Risks insulting the listener.
- "I don't see why that would be a concern." → Shuts down dialogue.
- "Trust me." → Better to show credibility than ask for it.
- "I understand exactly how you feel." → Unless you really do, this can backfire.

Swap these out for language that invites curiosity, shows respect, and keeps the door open.

Say: “According to a 2023 analysis in Forbes, companies that invested in this approach saw a 22% increase in adoption within six months.”

Liking

We are more influenced by people we like or feel connected to.

Example: Be curious, relatable, and genuinely interested in the other person’s context and goals.

Say: “It sounds like your team has been juggling a lot of priorities. What’s been most energizing for you lately?”

Scarcity

People place higher value on what is limited or not widely available.

Example: Be honest about timelines, availability, or capacity without manufacturing urgency.

Say: “Just to be transparent—I only take on two of these projects each quarter so I can stay hands-on throughout the process.”

Unity

We are influenced by those we see as part of our group or who reflect our values.

Example: Emphasize shared goals, values, or mission.

Say: “I really admire the way your organization centers community impact—that’s one of the reasons I was excited to connect.”

Carnegie’s Influence Strategies

Talk in terms of their interests

Example: Start by asking what’s most important to them—and respond with relevance.

Say: “What’s your top priority right now? I want to make sure everything I share is aligned with that.”

Let them feel ownership

Example: Invite them to shape the solution or direction.

Say: “Here are a couple of options based on what we discussed. Which direction feels like the best fit on your end?”

Show genuine interest

Example: Ask follow-up questions, repeat their key words, and take notes during the meeting.

Say: “You mentioned team fatigue earlier—can you tell me more about how that’s showing up day-to-day?”

Appeal to their intelligence and motives

Example: Acknowledge their expertise, and assume they want to do the right thing—not just check a box.

Say: “You’ve clearly thought this through. I’m curious—what’s the angle you’re most leaning toward?”

Avoid arguments

Example: Acknowledge disagreement without defensiveness.

Say: “That’s a fair point. If I were in your shoes, I’d probably ask the same question. Can I offer another angle on it?”

Be warm and human

Example: Smile. Use their name. Build a relationship, not just a transaction.

Say: “Thanks for carving out time today, Carlos. It was helpful to hear the specifics of what’s happening on your end—it gave me a much clearer picture of the situation.”

Reflection Prompt

Which of these principles or strategies do you already use naturally? Which ones could you be more intentional about applying in your next meeting or proposal?

Planning Prompt

Choose an upcoming meeting or conversation. Write one sentence for each principle above describing how you could apply it in that context.

Book a discovery call! Or send me [send me a DM on LinkedIn](#) to find out how you can go from meeting to momentum—and turn every conversation into a clear next step toward yes.

What not to say (Influence)

When you're trying to build connection and credibility, these phrases can make you seem dismissive, scripted, or fake:

- “Let me stop you right there.” → Interrupts and shuts down the flow.
- “You should...” → Sounds like a command, not a collaboration.
- “With all due respect...” → Usually a red flag that disrespect is coming.
- “It’s not personal.” → Influence is personal—don’t pretend it isn’t.
- “I know exactly what you need.” → Skip the assumptions. Invite their input instead.

*Choose words that invite discussion, not defensiveness.
Influence works best when the other person feels like a partner, not a target.*