The Influence Map

Building the Decision With Your Customer

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Executive Summary

An influence map is a visual picture of everyone who shapes a buying decision on a given opportunity, including the people who never sit on the buying committee and whose opinions walk into the room with everyone who does: who can approve it, who can stop it, who sways whom, and how strong your relationship is with each of them.

It's to enterprise selling what a nautical chart is to a harbor pilot. It shows the channels, the shoals, and the waters nobody has sounded yet.

Complex deals are won by coalitions. Six to ten people typically shape an enterprise decision, and most of the influence never shows up on the org chart.

- **Draft the map first, then take it to your customer.** Your first version is a hypothesis built from what you and your team know. The customer's corrections make it real: a question in a normal meeting, then fifteen minutes on the sketch, then a working session once they see what it does for them.
- **Hide nothing. Write carefully.** A weak relationship kept to yourself stays weak, so talk it through openly with your sponsor, scores and all. In anything that might be forwarded, write down the concern and the next step, and leave the score for the conversation.
- **Score relationships on evidence.** A balance from –5 to +5 measures how much someone trusts yo8u, and it means something only when you can point to what they've done.
- **When a customer keeps the circle closed, flag it and find out why.** It's one of the clearest signals you'll get about where you stand.
- **For leaders, the map changes the deal review.** Inspect what stakeholders have done and what the customer has helped the team learn, instead of how confident the rep feels.

Part 1: Seeing the Web

Selling Into the Human Web

Enterprise deals are decided by people. People with competing agendas, personal ambitions, and informal networks that rarely appear on any chart.

If you've been in the field long enough, you've lived this. A champion assured you they were the decision maker, and the real decision got made three levels up, shaped by someone you never met. Or a stakeholder you barely noticed quietly stopped months of work.

An influence map makes that web visible. Drafting it yourself and then testing it with your customer changes what you get from it.

If you carry the quota, it means fewer late surprises, deals that survive when your champion leaves, and customers who start treating you as a partner in getting their initiative approved.

If you lead or coach the team, it means forecasts built on evidence, deal reviews about what customers have actually done, and early warning on every deal resting on one relationship.

I've used the influence map at the center of account planning and opportunity reviews for decades, with sellers and with the managers who coach them.

The Champion Who Left

> "I'm the one with the authority to approve this."

A seller I coach heard that from his champion. He asked to bring someone more senior into the deal. The champion waved it off. Then the champion resigned, and a quarter's worth of work was left sitting in an empty office.

It was the second time it had happened to him. Years earlier, his sponsor retired mid-deal. The successor had sat in every meeting, nodding along. Over the next few weeks she asked for one more thing, then another, until she found a weak point and latched onto it. She had never been bought in. She was looking for a polite exit.

Twice was enough. So we wrote it on his wall, in big letters: **Build the influence map.**

Finding Jane Doe

I was running an opportunity review with a sales team. As we built the influence map together, a gap opened up.

A few people on the team had sold into the account before and knew how deals there actually flowed. That history told us a key stakeholder existed. Nobody had a name. A couple of vague mentions suggested she was a woman, and we had a rough sense of her role.

So we put **"Jane Doe"** on the map. Three people took action items: the product sales specialist, the presales engineer, and the customer success manager. Each went to their own inside coach to find out who she was.

Jane Doe turned out to be one of three people in the final purchase review. She had used a competitor at a prior company and still carried some allegiance to them.

We worked hard to build a relationship with her, and we won the deal. Without that review session, we would never have known she existed.

Look at who finished that map. Three people inside the customer, each willing to tell us what they knew, because they wanted us to win. The lesson travels. To find your own Jane Doe:

- **Ask the people who've sold there before** how deals in that account actually flowed, and who turned up late in the last one.
- **Offer your champion a hypothesis to correct.** *"At this size, I'd expect someone in risk to weigh in. Who would that be?"*
- **Put a card on the map anyway.** A role with no name still gets a card, an owner, and a date.

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What an Influence Map Shows You

An org chart shows	An influence map shows
Reporting lines	How the decision actually gets made
Titles	Who can say yes, and who can only say no
Who manages whom	Who whispers in whose ear
A snapshot	Where each relationship is heading

The map covers everyone whose opinion shapes the decision. Many of them never sit on the buying committee. Their opinions walk into the room with everyone who does. Decisions zigzag through friendships, alliances, and rivalries. Champions resign, retire, and get reorganized, and the January reshuffle is especially hard on deals that rest on one person. Most deals that die go to "no decision" or a late veto, usually from someone the seller never met or never brought along.

Look at your biggest deal. Who can spend the money? Who owns technical approval? Who carries quiet influence as a trusted advisor? Who's for you, who's neutral, who's resisting? Wherever the answer is fuzzy, that's where the risk lives.

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A Tale of Two Deals

The win. A coaching client was pursuing a global bank for a security solution. Our first assumption was that the CIO's office held the decision. The map told a different story: the COO held the purse, the risk director had his ear, and the CISO's team carried technical credibility with no budget. My client shifted strategy, building deposits with the COO around operational resilience and making the risk director feel like an insider. That coalition won the deal.

The map told her who mattered. A hypothesis for each person told her what to bring them. The COO and the risk director sat in the same building and needed entirely different conversations.

The loss. Another client pursued a large insurance company with a great champion in IT and very little time invested in procurement and compliance. Months later, the deal died quietly in the hands of a compliance officer she had never met.

Every unmapped influencer is a hidden risk. Every one you find in time is a deal you still get to fight for.

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Start With Your Next Meeting

Starting takes less than you'd think. No template, no workshop, no hour of the customer's time.

1. Draft a hypothesis. Before the meeting, sketch the decision as you believe it works: names, roles, who approves, who influences whom. Use what your CRM, your research, and teammates who've sold into the account can tell you. Every role you expect without a name gets a card that says "Jane Doe" or "John Doe." Ten minutes is enough, and it's supposed to be wrong in places.

2. Offer it as an educated guess. In the meeting, put your belief on the table and invite correction: *"Here's how I think a decision like this comes together here. Where am I off?"* Or ask *"The last time you brought in something of this size, who ended up weighing in?"* and check the answer against your sketch. Believe the structure, hold the specifics lightly, and write down every name, every function, every "and then it went to."

3. Bring the corrected version back. At the next meeting, ask for fifteen minutes: *"I've seen initiatives like this slow down when important people get involved too late. Would it help to spend a few minutes checking who needs to shape this, so neither of us gets surprised?"*

That's the first real version of an influence map: your hypothesis, corrected by the people who live inside the decision.

If you lead the team, start in your next deal review. Pick one deal in Commit and ask the rep the same question: *"The last time this customer bought something this size, who weighed in?"* If the answer is a shrug, you've found this week's coaching.

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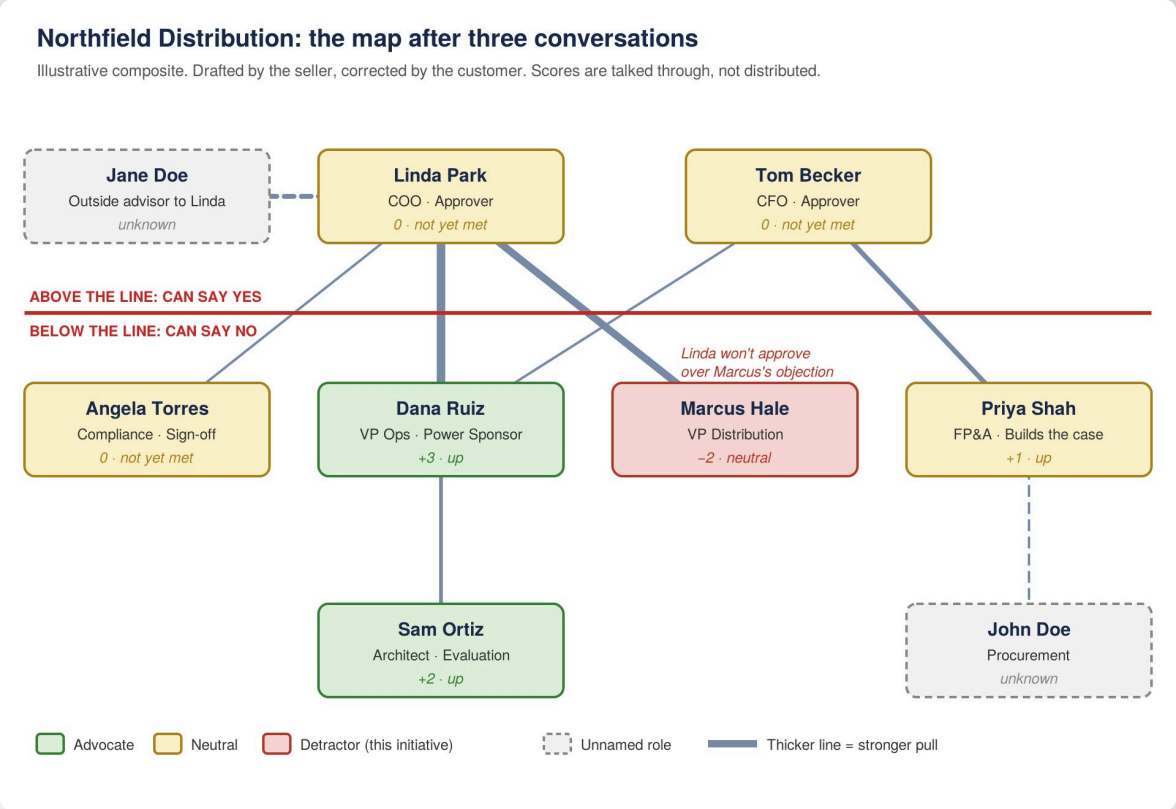
Part 2: What a Map Looks Like

An Example Map

Northfield Distribution

Here's an illustrative map from Northfield Distribution, a composite deal built from patterns I've seen many times. A regional distributor is evaluating a $750K warehouse operations platform, and the seller's champion is Dana Ruiz, VP of Operations. This is the map after three conversations with her, deliberately unfinished, because real maps are.



The shared view. The seller drafted it, Dana corrected it, and now both of them work from it.

Person	Role in this decision	What they need, in their terms	Next joint action
Linda Park, COO	Approver, capital committee	A rollout that protects Q4 service levels	Dana briefs Linda on the draft plan
Tom Becker, CFO	Approver, capital committee	Payback inside 24 months	Joint model session with Priya
Dana Ruiz, VP Operations	Project ownercommittee	Fewer mis-picks, less overtime	Weekly fifteen-minute check-in
Priya Shah, FP&A	Builds every capital case	Assumptions she can defend	Model working session
Marcus Hale, VP Distribution	Runs the floors that would change	No disruption during peak season	Meeting with our implementation lead
Angela Torres, Compliance	Signs off on data handling	Chain-of-custody records preserved	SE sends a data-flow summary
Sam Ortiz, Solutions Architect	Leads the technical evaluation	Clean integration with current systems	Technical deep dive
John Doe, Procurement	Negotiates terms	Unknown	Dana to name the buyer
Jane Doe, outside advisor	Reportedly advises Linda on operations	Unknown	Seller to ask Dana, gently

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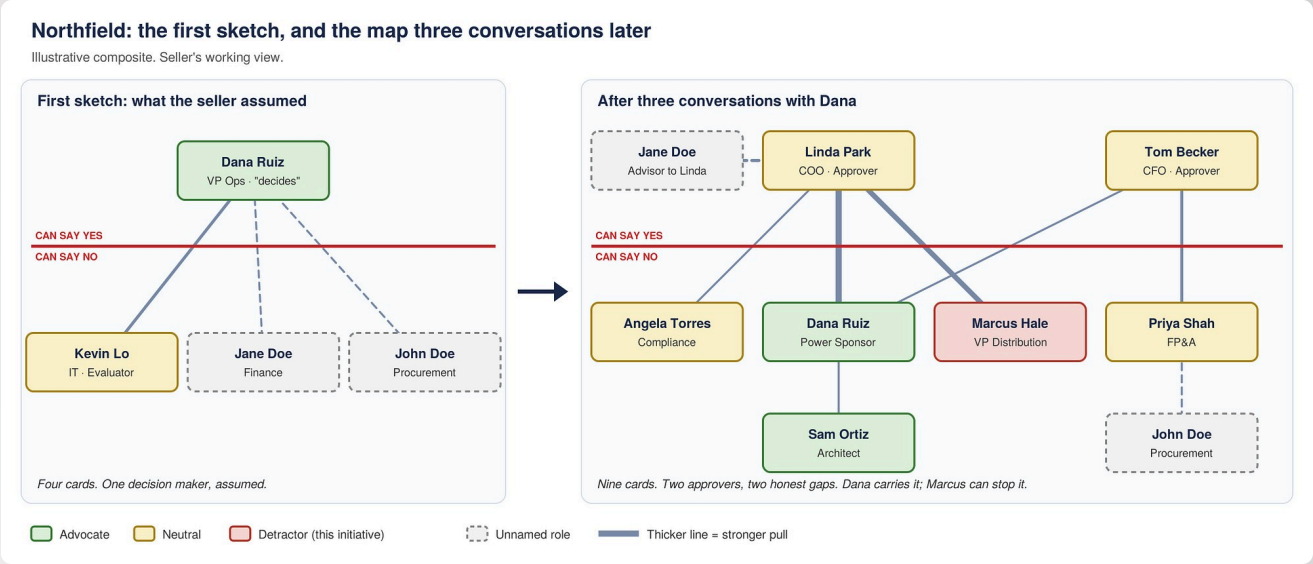
The seller's working read. Discussed with Dana, never circulated. The seller talks it through with her, out loud, and it's how Dana came to explain Marcus. The shared document carries the concerns and next actions.

Person	Disposition	Balance and the evidence	Trajectory
Linda Park	Neutral	0. Not yet met.	n/a
Tom Becker	Neutral	0. Not yet met. Known to be skeptical of operations payback claims.	n/a
Dana Ruiz	Advocate	+3. Candid about the committee process, introduced Priya, corrected the map, set up the Marcus session herself.	Up
Priya Shah	Neutral	+1. Took the meeting, followed up on time, asked for our model.	Up
Marcus Hale	Detractor, for this initiative	–2. Guarded. Hasn't returned two calls; speaks about us only through Dana.	Neutral
Angela Torres	Neutral	0. Not yet met.	n/a
Sam Ortiz	Advocate	+2. Shared integration documents without being asked, flagged a risk early.	Up

Kept private. One line. Dana mentioned, in confidence, that Linda and Tom are at odds over this year's capital budget. That's hers to share, and it stays out of anything that travels.

Three things to notice. Dana sits below the red line, because she can't approve the purchase herself, and her line to Linda is the thickest one on the map. Marcus sits below the line too, and Linda won't approve anything that touches the floors over his objection, so he matters as much as anyone above it. And two cards still have no name. That's normal. A map with honest gaps beats a complete-looking map built on guesses.

It didn't start that way. Here's the seller's first sketch beside the map three conversations later.



Part 3 shows how the map grew, one conversation at a time.

Roles on the Map

Economic Buyer (EB). Has a real vote on whether the money gets spent. In many enterprises that's a committee, or a budget owner plus an approver, as it is at Northfield. Map every approver, and learn which of them can actually move the decision.

Power Sponsor (PS). Your champion with real reach. The person who can walk into the boardroom, have a word with the Economic Buyer, and say "we need to get this done." Plenty of champions are friendly. A Power Sponsor can move the decision.

Key Stakeholder (KS). Has a significant stake in the business outcome of the project.

Influencer (I). Shapes what the key stakeholders believe, from a technical, financial, or business perspective.

Inside Coach. Your friend in the account. Validates your hypotheses, helps you navigate the politics, and wants you to win.

Shadow Influencer. Anyone shaping the decision whom you haven't met. An advisor, a consultant, a systems integrator such as IBM Global Services, the peer the Economic Buyer calls before big decisions, even an Executive Assistant. Years ago, an Executive Assistant called me and said, "He has an hour. Can you get here?" She got me into a meeting in midtown Manhattan because I'd treated her well every time I called. Treat everyone like it matters. Because it does.

Every person also carries a **disposition.** It answers one question: do they support this initiative? Advocate (green), Neutral (yellow), or Detractor (red). Disposition belongs to the initiative. The same executive can champion one project of yours and resist the next.

If your team already uses different labels for these roles, keep yours. The thinking matters more than the names.

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The Red Line

Draw a red line across your map.

Above the line sit the people who can say yes and fund it. They're the ones who need to see business value for the deal to get done.

Below the line sit the people who keep you in the deal. Technical buyers, evaluators, related influencers. They can say no. They can't say yes on their own.

Now notice where your calendar has been. Most sellers spend most of their time below the line, because that's where the friendly meetings are. The funding decision happens above the line.

Whether it succeeds may depend on people below it. Everyone on the map still matters, and a single no from below the line can stop a deal cold, as Marcus could at Northfield.

The line moves as you learn. Where it sits, and how strong your relationships are above it, says more about your forecast than any stage in the CRM.

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Where Each Relationship Stands

Every person on the map represents a Relationship Bank Account. Deposits build goodwill. Withdrawals spend it. Each person carries two readings.

Keep them separate from disposition, and score them on different evidence. Disposition asks whether someone supports the initiative. Balance measures your goodwill with them: how much you've earned the right to ask of them, and what they're willing to do for you.

A person can be glad to help you and still oppose the purchase. Someone who says "I like working with you, and this rollout is wrong for us" might sit at +3 and still be red. At Northfield, Priya is warming to the seller week by week and still hasn't taken a side on the investment.

Balance, from –5 to +5. Score it by how the person has treated you. How much you like them, or how often you've had lunch, doesn't count. Neither does their view of the purchase.

Balance	What you've seen them do
+5	Treats you as a trusted advisor. Brings you in before plans go public, tells you what's really going on, vouches for you in rooms you're not in.
+3	Candid with you. Shares internal context, tells you bad news early, opens doors.
+1	Engages constructively, takes the meeting, follows through on small commitments.
0	No evidence either way, or not yet met.
–1 to –2	Guarded. Slow to respond, gives you the official version, lets follow-ups lapse.
–3	Distrusts you or your company, and shows it.
–5	Works against you personally, whatever they think of the initiative.

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Trajectory: Up, Neutral, or Down. Trajectory needs evidence too. "Up" means something changed: a door opened, a concern got answered, an introduction got made. A +3 that's sliding deserves more attention than a +1 that's climbing.

Write the behavior down separately from your conclusion. “Two calls unanswered” is evidence. “Doesn’t trust us” is a reading of it, and another reading may fit just as well: a reorganization, a brutal quarter, a full calendar. Keeping the two apart lets a manager challenge the conclusion without questioning the rep’s honesty.

Be clear whose account it is. Goodwill can belong to a seller, an account team, or a whole company. A customer burned by a previous team may start your company in the red. Dana’s +3 is with this seller.

Keep the evidence, the scores, and the trajectory in your working notes. Discuss them candidly with your sponsor. Carry concerns and agreed actions into the shared map.

You don’t need the full Relationship Bank Account practice to use this map. Start with the evidence you have. The balance and trajectory help you read it consistently, and the weekly practice of reviewing those relationships has its own guide. Here’s what a balance looks like when a customer hands it to you.

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The CIO Who Gave Us the Score

At a manufacturer in New Jersey, the CIO sat us down and told us, candidly, what the prior sales team had done. They had taken advantage of him and sold him shelfware. We were starting well below zero, and he wanted us to know it.

Then he told us how to fix it.

"Your team needs to rebuild trust. And the way to rebuild trust is to keep showing up. Make reasonable promises, and follow through on every one. Stick with us while we don't buy anything, and then maybe things will change."

Read that again with the map in mind. A key stakeholder told us our balance with him, somewhere around –4. He told us which deposits would count: small promises, every one kept. And he set the timeline, months of showing up with nothing to ask for.

So we showed up. Fourteen months later, he invited us to explore a significant transformation initiative. We had earned our way back into the room. We didn't win that particular deal. Even so, over the following year the company steadily expanded what it bought from us.

The balance outlasted the deal. That's what the bank account is for.

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One Map, On the Table

Most sales teams treat the influence map as private intelligence. It gets drawn in a conference room, stored in the CRM, and guarded from the customer. This guide asks for the opposite: draft one map of the customer's organization, take it to the customer, and work from it together as it grows.

The customer knows far more about their organization than you do. No single person sees all of it, though. The mapping conversation surfaced Linda's outside advisor, even though Dana couldn't yet name her. A shared map helps everyone surface what nobody sees alone. Jane Doe was found because people inside the customer wanted the team to win.

It serves them first. The champion gets a path to approval and an early look at who might object. Nobody gets surprised in the committee meeting.

It's how account planning works. Account planning is joint planning: the best teams plan with their customers, in the customer's boardroom, with the customer's leaders at the table. A map drawn behind the customer's back can't survive that room. A draft offered to them, and corrected by them, belongs in it.

Weak relationships go on the table, too. The instinct is to keep the low scores to yourself. Interrogate that instinct. A low score is a problem to solve, and hiding it from the people who could help solve it is how it stays a problem. Keeping a weak relationship out of sight is self-protection dressed up as strategy. A problem concealed is a problem preserved.

There's usually a question sitting in the pit of your stomach. *Does Marcus trust us at all? Is Dana carrying this, or just being polite?* It's the one you've been avoiding because you're afraid of the answer. That's the one to ask.

A seller who isn't attached to the outcome can share the hard stuff, because there's nothing to defend. A seller truly committed to the customer has to share it, because that's the only way to find out whether it can be worked out. Detachment and commitment both end at the same move: put it on the table.

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Say the score out loud. Write the concern down. Share your standing with someone the way the New Jersey CIO shared ours: plainly, with what it will take to change it. *"I think we're around –2 with Marcus. Here's what we've seen, and here's what we'd like to try."* Have that conversation with your sponsor, face to face. In anything that might be forwarded, record the concern in terms the person would recognize if they read it: *"Concerned about disruption during peak season. Owner: Dana and our implementation lead. Next: working session."* The truth stays whole, and nobody gets reduced to a number in someone else's inbox.

On the shared map	Said out loud, with your sponsor	Kept private
Names, titles, and roles in the decision	Your balance with each person, and the evidence	A confidence someone gave you
Approvals and responsibilities	Dispositions	A read on an internal rivalry that isn't yours to air
Concerns, in terms the person would recognize	Trajectory, and what changed	The personal stakes behind someone's needs
Joint actions, owners, and dates		
Open questions, unnamed roles, and what you've promised and not yet delivered		

The private margin is real, and it's smaller than we pretend. Most of what sellers hide is merely uncomfortable. Very little of it is sensitive.

Part 3: Three Conversations

The map gets built in conversations. Three of them matter most: the invitation, the sponsor test, and the difficult stakeholder. Northfield shows all three.

The Voice That Says Don't Ask

Each of these conversations asks something of you. As you read them, a voice will probably speak up. *They're too busy for this. I'll look like I don't know the account. Better not to ask.*

Notice it, and ask anyway. What quiets it is your own belief. When you believe the map serves the customer, the invitation sounds like help, because it is. Your customer will believe in this map about as much as you do.

Conversation 1: The Invitation

At Northfield. Before the first meeting, the seller drafted a hypothesis with four cards: Dana as the decision maker, Kevin Lo from IT as the evaluator, a Jane Doe in finance, and a John Doe in procurement. In a regular discovery call, the seller offered it as an educated guess and asked one question: *"Here's how I think this comes together. The last time you brought in something of this size, who ended up weighing in?"*

Dana explained that anything over $500K goes to a capital committee: Linda Park, the COO, and Tom Becker, the CFO. A finance analyst builds every case they see. The map changed on the spot. Linda and Tom went above the red line. Dana moved below it, as the project owner who would present the case to the committee.

One draft, one question, no meeting request. The hypothesis was wrong in the most useful way, and the customer fixed it.

Grow the invitation in steps. Few customers will give you an hour for an exercise they haven't seen. Most will answer a good question, and many will give you fifteen minutes once they see where it leads.

1. **A question inside a normal meeting.** Bring a point of view about how decisions like this usually get made, and invite the customer to correct it:
    - "In decisions like this, finance and security usually get involved around now. Who would that be here?"
    - "Who could slow this down if they had concerns nobody addressed?"
    - "Whose opinion does your boss trust on decisions like this?"
2. **Fifteen minutes to correct a sketch.** Bring what you've learned and ask the customer to fix it.
3. **A working session.** Once the customer sees the value, map the whole coalition together and agree who talks to whom.

Make it about what they gain. When a champion asks why they should spend time on this, the answer is about their initiative:

- No late surprises from security, finance, or procurement
- The people who'll live with the change get to shape it before requirements are final
- Support that survives a reorganization or a leadership change
- No embarrassment when an overlooked executive objects in the committee meeting
- A faster path to approval

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Earn the Ask

Earn it first with something useful, and frame the ask around those gains. *"Can we schedule an hour to build an influence map?"* sounds like you managing your opportunity. *"Would it help to spend fifteen minutes making sure nobody who matters gets surprised?"* sounds like you helping them.

Pay attention to the answer. A customer who needs what you're offering usually leans in. Building the map does something for them, too. Many initiatives stall because the person carrying them can't see how approval would actually happen. Watching the coalition take shape, name by name, turns "this will never get through" into "here's who we need, and here's who's already with us."

A customer who keeps the circle closed is telling you something. "Let me handle the internal side." "You don't need to worry about finance." When you hear that:

1. **Flag it, and watch carefully.** Mark it as a risk on the deal. Note whether it changes as you build goodwill.
2. **Find out why.** Some champions are protecting their calendars. Some are protecting colleagues from political exposure. Some haven't decided they want this and are keeping their options open. Each reason calls for a different response, and the third tells you which seat you're in. A seller kept in the vendor's seat rarely gets invited to guide.

At Northfield, fifteen minutes later. At the next meeting, the seller brought six names and asked Dana to correct them. She fixed two roles: Kevin had moved to an ERP upgrade, and Sam Ortiz, his architect, now ran the evaluation. The Jane Doe in finance was Priya Shah, who builds every capital case. Then she added two names the seller had never heard. Angela Torres in compliance would have to sign off on data handling. And Marcus Hale, VP of Distribution, was worried.

Coaching it. Ask the rep to say the invitation out loud, word for word. Listen for whose problem it solves. Then ask what the customer said, and how they said it.

Conversation 2: The Sponsor Test

A friendly champion and a Power Sponsor look the same until the deal needs moving. The sponsor test tells you which you have, without putting your champion on the defensive.

The friendliest version of the question: *"If you won the lottery tomorrow and never came back, who would carry this forward?"*

It's a light question that tells you whether the deal survives without them, and it opens the conversation about who else belongs in the circle. Widening that circle serves your champion. The more people behind their idea, the more likely it gets approved, and the more they look like the hero.

Then look for evidence. What has your champion actually done? Opened a door, shared how the committee works, brought you a colleague? Can they get you thirty minutes with the Economic Buyer? Score what they've done, using the anchors in Part 2.

At Northfield. The seller asked Dana the lottery question. She laughed, then answered seriously: *"Linda would pick it up. But only if Marcus is on board. She won't approve anything that touches the floors over his objection."*

That answer told the seller two things. Dana understood exactly how the decision worked. And the deal ran through Marcus.

Understanding the decision is a good sign. Moving it is the proof. The lottery question tests whether support survives the champion. Only action tests whether the champion can mobilize that support. The seller would find out in the next conversation.

Coaching it. When a rep calls someone a champion, ask what that person has done in the last thirty days. Friendly is a feeling. Action is evidence.

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Conversation 3: The Difficult Stakeholder

Every map has a Marcus: a stakeholder whose concerns can stop the initiative, whatever your balance with them. At Northfield, Marcus was also guarded with the seller: two calls unanswered, and every message routed through Dana.

Most sellers keep Marcus to themselves and hope. The better move is to get curious about him, with your Power Sponsor:

"How do you think Marcus sees us? What's he carrying that we haven't understood? What would it take for him to feel good about this? And if the honest answer is that he won't come around, should we both be spending time on this?"

That last question feels risky. It's the most useful one you can ask. Notice what all four questions leave out: any judgment of Marcus. Every one is about your standing with him and what he needs, so asking them means owning a problem. Your sponsor has almost certainly heard Marcus in meetings you weren't in, and they'll respect you for naming what they already know.

Have this conversation with someone where your own balance is strong, +3 or better. If you can't have it with your champion, that tells you something about your champion.

At Northfield. Dana explained. Two years earlier, a system rollout had slipped into peak season, and Marcus ran the floors while orders backed up. He lost a major customer and spent months rebuilding his team's confidence. He had nothing against the seller. He was protecting his people.

Dana added one more thing. After that rollout, Linda started running big operations decisions past an outside advisor, someone she'd worked with at her previous company. Dana didn't know the name. A new card went on the map, Jane Doe, with the seller as owner, and a note to ask Dana gently, once the Marcus meeting was behind them.

So the seller stopped trying to get past Marcus and invited him in. Dana set up the session herself: a working session with Marcus and the seller's implementation lead, where Marcus would help set the go-live date and the cutover plan, well clear of peak season. Marcus accepted the same day.

That was the proof the lottery question couldn't give. Dana could move people. She was a Power Sponsor.

The map now carries a stakeholder who started below zero and is about to become a co-author of the plan. Nobody sold around him. The team understood him, with the customer's help.

Coaching it. Ask every rep with a Commit deal who their Marcus is. "Nobody" is rarely true. Then rehearse the conversation with them before they have it with their champion.

Part 4: Working the Map

Building It: A Checklist

1. **Draft from what you know.** CRM, research, AI tools, and teammates who've sold into the account. Then take it to your champion to correct.
2. **Find every stakeholder.** Approvers, evaluators, procurement, legal, security, users, partners, consultants, and anyone with weight and no formal role.
3. **Look past the titles.** Who sways decisions, who's risk-averse, who carries scars from a past vendor or rollout?
4. **Draw the relationships.** Lines for influence, thicker for stronger pull. Color by disposition in your working view.
5. **Capture what each person needs, in their own terms.** Note the outcome each approver needs and why it matters. If you use a Business Value Hypothesis, connect it here. Personal stakes stay in the private margin.
6. **Name the gaps.** Every unnamed role gets a Jane Doe card, an owner, and a date.
7. **End with actions.** Two or three next steps, each with an owner and a date. A map that changes what you do next is the point.

Software Drafts. Conversation Completes.

AI tools can draft a stakeholder chart from email, calendar, and CRM data in seconds. Use them. They're excellent at the skeleton, and good at flagging names you haven't engaged.

Let the tools propose. People decide. No tool should assign a relationship score because someone attended six meetings, and nothing a tool infers about a person goes on the map until someone has checked it.

At Oracle, my division built influence maps the old-school way: talking them through at a whiteboard, then transferring them to slides. Team members regularly disagreed about someone's role or the strength of a relationship, and those disagreements were where the value was. Every gap became an action item: who, what, by when.

Years later, I facilitated account planning for a team that kept its influence maps in a dedicated planning platform. They suggested we simply pull up the existing map. Instead, we built a fresh one at the whiteboard. Forty-five minutes later we compared the two. They were very different, and the whiteboard version held far more names.

Software records what the team already wrote down. The conversation surfaces what nobody has written down yet. Bring the customer into that conversation and it surfaces even more.

While the map gets drawn, watch the room. Who answers first, and who waits to hear what the senior person says? Which name makes someone pause? Who glances across the table before describing a colleague? None of it needs interpreting on the spot. Write a word in the margin. Those margins often hold the most important intelligence the session produces.

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Using the Map Through the Deal

Before every call. What's your goal with this person? What will matter to them?

During discovery. Where are you blind? Haven't met legal? Missing the CFO's perspective? The map shows you.

Across the account. How many functions and levels are you engaged with? One thread is a single point of failure.

With detractors. For each one, ask what they'd need to see to feel comfortable, and ask your champion the same question. Many concerns can be answered, as Marcus's was. Some people will never move, and learning that early is worth a great deal.

With competitors. Your competitor is making deposits with the same people. Jane Doe's allegiance came from a prior company, and it nearly cost the deal. For each stakeholder who leans toward another vendor, learn what they value in that relationship. Sometimes you earn a hearing by addressing what the other vendor never did. Sometimes the coalition carries the decision around a loyalty that won't change.

At forecast time. "We're close" means very little without the map behind it. Before a deal goes to Commit, check for these flags:

- An approver you haven't met
- A champion with no evidence of action
- An influential stakeholder who's opposed or unengaged, with no plan
- A map the customer has never seen or corrected
- A deal resting on one relationship

A deal can close with a flag open. Every open flag on a Commit deal gets a conversation with your manager and a plan. The point is that everyone can see the risk, so nobody has to inflate a score to move a deal forward.

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Your Influence Map Check

Run these questions on the deals that matter most this week. Start with three.

1. Has the customer seen and corrected this map?
2. Who approves the money, and have you met them?
3. If your champion disappeared tomorrow, who would carry the deal?
4. Who sits above the red line, and what have they done that supports your read of them?
5. Who's whispering in the decision makers' ears?
6. Is there a stakeholder you've been hoping will go away, and have you talked about them with your champion?
7. Is there a Jane Doe on this deal?

Every blank is a risk. Every risk you name now is one you can still act on. Fold ten minutes of map updates into your weekly review.

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DIY Influence Map Template

Build it in slides, a spreadsheet, or on a whiteboard. For each person, create a card:

Field	What to capture	View
Name and title	Who they are, or "Jane Doe" until you know	Shared
Role	EB, PS, KS, I, Inside Coach, or Shadow Influencer	Shared
What they need	In their own terms	Shared
Next action	What, who, and by when	Shared
Disposition	Advocate, neutral, or detractor, for this initiative	Working notes; discussed, never circulated
Balance	–5 to +5, with the evidence	Working notes; discussed, never circulated
Trajectory	Up, Neutral, or Down, with what changed	Working notes; discussed, never circulated
Private margin	Confidences, internal rivalries, personal stakes	Private, and kept small

Arrange by authority, then influence. Place funding approvers above the red line. Below it, arrange everyone else by role and influence, including partners and consultants. Use the connecting lines to show whose judgment carries weight with whom.

Draw the red line. Above it, the people who can say yes. Below it, the people who can only say no. Move it as you learn.

Give every gap an owner. Each unnamed role gets a card, an owner, and a date.

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Clarity Over Chaos

In enterprise sales, the path to yes is messy, political, and human. An influence map won't eliminate the mess. It will make the invisible visible.

Every deal I've seen lost to a surprise had an unmapped person at the center of it. And every Jane Doe found in time, every Marcus understood before the committee meets, is a deal you still get to fight for.

Deals are won by coalitions. Draft the map, then let the customer, who knows better than anyone who belongs, make it right.

So ask one good question in your next meeting, and let the real selling begin.

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Where This Fits

An influence map is one of four working tools in a strong account plan. A mission the customer would recognize as theirs. A Business Value Hypothesis about where the real value lies. The map of who decides. And the Relationship Bank Account, which tracks how each relationship on the map is moving, week by week.

Each has its own guide at **acelera.group**, and they work best together.

Start with one initiative and one buying decision. You don't need a finished account plan to build an influence map. As your account planning develops, the map becomes one of its working tools.

Build Your Map With Me

For sellers. Bring your most important deal to a complimentary 30-minute coaching session. Together we'll build the influence map, identify the missing players, test your assumptions, and you'll leave with a plan to close the gaps, whether or not you ever engage a coach.

For sales leaders and enablement. If you want your whole team doing this, from the first question to the forecast review, let's talk about turning influence mapping into a team capability your managers can coach.

Book at meet.acelera.group

Lee Levitt is the founder of The Acelera Group, a sales coaching and methodology practice, and the author of *Together We Win* and *The Second Meeting*. He co-developed the Oracle Value Selling Methodology and co-founded the Sales Enablement Society.

Appendix: For Sales Leaders and Managers

If You Lead the Team: Start Monday

1. **Pick three deals.** Your three largest in Commit or Best Case. Ask each rep: *"The last time this customer bought something this size, who weighed in?"*
2. **Ask for a draft by Friday.** A rough sketch with names, approvers, and a Jane Doe card for every role without a name. No template required.
3. **Send it to the customer.** Within two weeks, each rep takes the draft to their champion for fifteen minutes of correction.
4. **Add ten minutes to your deal reviews.** Run the influence review below on those three deals, every week.
5. **Ask for evidence.** When a rep calls someone a champion or a +4, ask what that person has done. When a rep reports a weak relationship, ask who inside the customer could help.
6. **Run one exercise a month.** Start with the Northfield walk-through.

After thirty days, look at what customers corrected and which gaps got owners. Then add the next three deals.

The Ten-Minute Influence Review

Use it in deal reviews, rotating through the opportunities that matter most and anything proposed for Commit.

Time	Ask
2 minutes	"Show me the map. What's changed since we last looked?"
2 minutes	"Who actually has the power to get this done? How do we know?"
2 minutes	"Where are our weakest relationships, and have we talked them through with the customer?"
2 minutes	"What has the customer helped us learn?"
2 minutes	"What's the most important action before our next review?"

Inspect the thinking.

A rough map with eight names the customer has corrected and two honest unknowns beats a polished one with twenty names nobody has tested. Reward accurate diagnosis over green boxes.

When a rep says a stakeholder is a +4, ask what that person has done. When a rep reports a –3, treat it as a shared problem to work, and ask who inside the customer could help.

A rep who learns to hide low scores from the review will hide them from the customer, too.

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Exercises to Run With Your Team

- **The Northfield walk-through**. Use Northfield as a staged case before anyone maps a live deal. Hand out the seller's four-card first sketch. Then reveal what each conversation brought, one at a time: Dana's answer about the capital committee; the fifteen-minute correction that added Sam, Priya, Angela, and Marcus; Dana's explanation of Marcus and Linda's advisor; Dana setting up the Marcus session herself. After each reveal, ask: What changes on the map? What do we know now? What are we still assuming? What would you do next? Finish by comparing the team's map with the one in Part 2.
- **Jane Doe hunt.** Each rep picks an account with seven or more stakeholders on the map. Who probably exists that isn't there? How would you find them? Every answer gets a card and an owner.
- **The invitation rehearsal.** One rep invites a partner, playing the champion, to correct a sketch of the map. Run it twice: once with a champion who's all in, once with one who's hedging. Debrief with one question first: how did that feel?
- **The sponsor test.** One rep asks the lottery question, follows the answer, and agrees with the champion on a concrete action that would show they can mobilize support. Debrief: what did the answer reveal, and what's still unproven?
- **The Marcus conversation.** One rep raises a difficult stakeholder with a partner playing the Power Sponsor, including the question about whether to keep investing. Practice until it sounds like curiosity and lands as partnership. Debrief the same way: how did that feel?

For every exercise, after the first debrief question, observe four things. Did the seller explain what the customer gains? Did they offer a hypothesis and hold it lightly? Did they explore the concern without judging the person? Did the conversation produce new information or an agreed action?

- **Champion stress test.** Ask the lottery question about each deal's champion as a team. If the honest answer is "nobody," that's this week's priority.

For help with inspection standards, skill development, or supporting the practice in your systems, start a conversation at meet.acelera.group.

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