

# Persuasion & Advocacy

*The Role of an Advisor's Use of Persuasion & Storytelling in Government, Business, and Beyond*



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# About the Speaker & What You Will Get Out of This Presentation



Alexandre “Alexi” Tilly currently is an Officer at State Street Bank & Trust within the Alternative Investments division. Previously, he was a Consultant at FTI Consulting, a premier corporate restructuring firm, in New York City.

In his spare time, Alexi enjoys reading, working out, cars, and eating great food.

University: Arizona State University, 2022  
 Degree: Finance & Supply Chain Management B.S.

## Learning Objectives & My Presentation Style

1. Introduce you to the career paths of advisory roles and the requirements/day to day of advisors
2. Understand the importance of persuasion/storytelling for advocates & advisors and applications to day-to-day life
3. Learn the basics of rhetoric and learn levers of persuasion/thinking
4. Learn storytelling as a driver for discourse for private & personal life
5. Develop a personal toolkit for employing persuasion to learn about others

### **What I recommend for the presentation:**

- *Save questions for the end as I move quickly, ask questions during the interactive portions*
- *I like interactive presentations, so please feel free to interject with an answer*
- *Take notes as you don't know what could be useful for the future!*

# What is an Advisor?

*Types of Advisors, Roles and Career Paths,  
Requirements & Resources, and  
Applying it to Boys State*



# What is an Advisor & Reasons for Hire

## What is an Advisor?

- An advisor is an expert in a field of study that can counsel and provide recommendations their clients
  - Generally, this is an individual who has a higher level of education or has gained enough experience to opine on their given field of expertise.
  - Advisors come in many forms from business, tax, law, etc.
- Advisors foster Trust
  - Many systems in which advisors operate in can collapse if trust isn't present
    - Henry the 6th, Shakespeare: "The first thing we do, let's kill all the lawyers..."
    - Think about banks, lawyers, etc.
      - What happens if people don't trust banks or the legal system?

## Reasons/Scenarios for Hire

- General Reason for Hire:
  - Provide Input in Unknown/Known Circumstances: the client experienced or will experience a novel situation and they need an expert, e.g., business going public or criminal proceeding.
    - The "what should I do" to alleviate this problem
  - Outside Perspective and Validation: the client have a difficult problem that needs a second pair of eyes to validate current beliefs, e.g., consultants, financial advisors.
    - The "what could I do" to have support, define processes, or eliminate bias
  - Network: the client faced a problem that needs a partner or network of partners for the future, e.g., consultants, financial advisors.
    - The "who should I know" to have a network of advisors around me

# Roles & Career Paths Examples

These different roles are generally very competitive, require preparation and a strong network to get them

## Law

- **Roles:** Attorney, Lawyer
- **Expertise:** Civil Rights, Corporate, Criminal, Employment, Environmental, Family, IP, Real Estate, Securities, etc.
- **Hours/Week:** 40 - 70+
- **Entry Level Salary (AZ):** \$60 – \$180k+ with Bonus
- **Education Req:**
  - Undergraduate
  - JD, pass the Bar
  - *LLM & JSD*<sup>1</sup>

## Finance

- **Roles:** Banking, Consulting, Asset Management, Alternatives, REITs, Research, Corp Fin
- **Expertise:** M&A, restructuring, healthcare, tech, etc.
- **Hours/Week:** 40 – 80+
- **Entry Level Salary (AZ):** \$60 – \$110k+ with bonus
- **Education Req:**
  - Undergraduate
  - *Certifications*<sup>1</sup>

## Tax

- **Roles:** Audit, Accounting, Tax
- **Expertise:** Accounting, Corporate Tax, Import Tax, Audit
- **Hours/Week:** 40 - 80
- **Salary (AZ):** \$60 – \$100k
- **Education Req:**
  - Undergraduate
  - Masters
  - Professional Certifications

## Politics

- **Roles:** Civil Servant Positions
- **Expertise:** Law, Election Processes, Zoning, Economics, State/County/City Processes, etc.
- **Hours/Week:** 40 - 50
- **Salary (AZ):** \$40 – \$100k
- **Education Req:**
  - Undergraduate
  - *JD, pass the Bar*

## Medical

- **Roles:** Doctor
- **Expertise:** Allergy, Anesthesiology, Cardiology, Neurology, Dermatology, etc.
- **Hours/Week:** 40 -70
- **Salary (AZ):** \$95 – \$130k+
- **Education Req:**
  - Undergraduate
  - *Masters*<sup>1</sup>
  - MD
  - Residency
  - Medical Licensing

1. *Optional but can be used to distinguish yourself from others*

*Note: everything that you see here are estimates and by no means certify an outcome*

# Applying It To Boys State

- There are roles that are advisor focused or use elements of advocacy or advise executive roles... not to mention that you need to advocate for yourself during elections
- Roles like attorneys, public defenders, senators, house representatives must advocate for their clients, ideas, and party or public at large
  - Think about it, if you don't know how to properly advocate for yourself or your party that you are representing you aren't going to be very successful during the week → *go out there and learn!*
- What do you want to get out of the week?
  - I recommend focusing on one area that you can improve on and focus on executing perfectly or as well as you can
    - Two perfect examples:
      1. If you use a lot of filler like “um” or “like,” work on eliminating it this week, or
      2. If you struggle with public speaking, go out there and practice
    - This week is perfect to give different strategies a try, be tactful and think through different ways to win over your peers & have fun with the week and your cohort
- Now, let's talk about the details without getting too much into the weeds

# Understanding Persuasion

A Primer to Persuasion & Storytelling



# Understanding Persuasion & Storytelling, a Primer

- When people say that persuasion & storytelling is important, people generally agree or say some sort of sly remark like “no...yeah...duh”
  - But here is the problem: not that many people are good at it
    - Think about it, what was the last time that you had to convince someone, who you never met before, of something that YOU wanted? Were you successful?
  - So how are we successful with storytelling & persuasion to not only get what we want but to make sure we don’t look out of place during the process?
  - Let’s talk about:

1. History

2. Basic Ideas & Key Figures

3. Storytelling

Some relevant & not-so-relevant examples:

1. You are applying to a very selective college and need to convince the admission’s board that you’ll be a great fit for the college.
2. You are meeting someone for the first time and want to make a good impression on them.
3. You are gunning for a president role in your favorite club or organization.
4. You are looking for a promotion at work.
5. You are thinking of closing a deal with a client.
6. You are writing finalizing you’re closing argument as a lawyer.
7. You are walking through the options of a medication as a doctor
8. You are convincing a politician as an advisor the impact of a certain policy

# History of Rhetoric, Oversimplified (1 of 2)



**Plato:** *[Rhetoric] is the "art of enchanting the soul." (The art of winning the soul by discourse.)*

**Francis Bacon:** *The duty and office of rhetoric is to apply reason to imagination for the better moving of the will.*

**George Campbell:** *"[Rhetoric] is that art or talent by which discourse is adapted to its end. The four ends of discourse are to enlighten the understanding, please the imagination, move the passion, and influence the will."*

- Greek & Roman Sophists, Philosophers, Politicians, & Orators
  - The known origins of Rhetoric, the art of persuasion, begins with education of the political elite and sophists, highly paid teachers who travelled to teach (philosophy, rhetoric, music, athletics and mathematics) in Ancient Greece
    - Think of Protagoras, Xenocrates, and Gorgias
  - Plato & Aristotle formalized education with Aristotle creating his treatise "Art of Rhetoric" in the 4<sup>th</sup> Century BC
  - Examples political & military speeches of the time are within the Thucydides's History of the Peloponnesian War
- Roman Politicians & Orators
  - As time progressed and Mediterranean economic strength and military power shifted to Rome, speech craft and politics thrived under both the Roman Republic (509 BC to 27 BC) & Roman Empire (27 BC to ~395<sup>1</sup> AD)
    - Major Figures: Cato the Elder, Cicero, and Quintilian

1. The ending of the roman empire is contested, but a place marker is put for the sake of presentation brevity

# History of Rhetoric, Oversimplified (2 of 2)

## Medieval & Renaissance

- Medieval Ages

- Rhetoric became geared towards verbal effectiveness through the Medieval Church, education was a supplement to the core educational teachings of logic & theology

- Key figures: St. Augustine of Hippo, Thomas Aquinas, Pope John XXI (Peter of Spain)

- Renaissance

- Growth of interest in vernacular rhetoric, applying rhetoric to a speaker's non-native language as the world became more interdependent & politically tied
- Elocution, speaking with gestures, was subject to early debate and methods of effectiveness

- Key figure: Petrus Ramus

## Into Modernity

- Modernity

- Discussion of faculty psychology (i.e. the notion that will and reason account for all human behavior) and associationism (most mental activities based on ideas (e.g. empiricism vs rationalism)

- Key figures: Francis Bacon, David Hume, Hugh Blair, George Campbell, Richard Whately, Jacob Burchhardt

- Application of rhetoric and persuasion into various other modes like advertising, etc

- Transition includes applying rhetoric in advertising of “this is a good product” to “this product solves YOUR particular problem”

- Key figures: Helen Lansdowne Resor, Leo Burnett, Raymond Rubicam, Rosser Reeves, David Ogilvy, Bill Bernbach, Phyllis Robinson, Mary Wells Lawrence, Hal Riney, Howard Luck Gossage, Lester Wunderman, Tom Burrell, Lee Clow

# General Ideas Argumentation

This is an Argument



- Arguments are like tables:
  1. Tables need support to stand up properly
  2. If you break the legs of the table, it will collapse
- Example: “Arizona is the best state to live in because of the great hiking!”
  - Which one prompts a better conversation?
    - Response 1: “No, you’re wrong!”
    - Response 2: “Other like Hawaii have great hikes too”

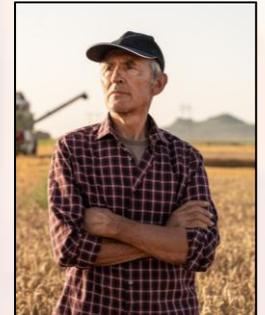
Be Prepared: It Can Happen & Will Happen

- An interview for the CEO position at a publicly traded Fortune 500 bank after the previous CEO, both the individuals below show up for the interview:

Option 1 - Formal



Option 2 - Informal



Who would you choose?

- Lessons from this example:
  1. Choices always consequences (e.g., trade-offs)
  2. Be willing to put yourself out there & be comfortable that 10% of people will not like you – make a choice

# Ideas of Argumentation, Classical (1 of 3)<sup>1</sup>

The persuasion process can be simplified into three types of appeals: Ethos, Pathos, & Logos

## Ethos



- **Definition:** Appeals to the writer’s character. Ethos can also be thought of as the role of the writer in the argument, and how credible his/her argument is.
- **Timing of Ethos:** Exclusively beginning or when the argument calls for you to prove credibility
- **Formality:** (1) Sound reasoning, and relevant experience (Phronesis), (2) Moral character (Arete), and (3) Good intentions towards the audience (Eunoia)
- **Examples:** Authority, trustworthiness, expertise, similarity, ad hominem

## Pathos



- **Definition:** Appeals to the emotions and the sympathetic imagination, as well as to beliefs and values. Pathos can also be thought of as the role of the audience in the argument
- **Timing of Pathos:** Anytime
- **Formality:** People often underestimate the power and importance of being able to expertly direct the emotional current of an audience to win their allegiance or sympathy
- **Examples:** Expressive descriptions, vivid imagery, personal stories, emotion-laden vocabulary, evoking an emotional response

## Logos

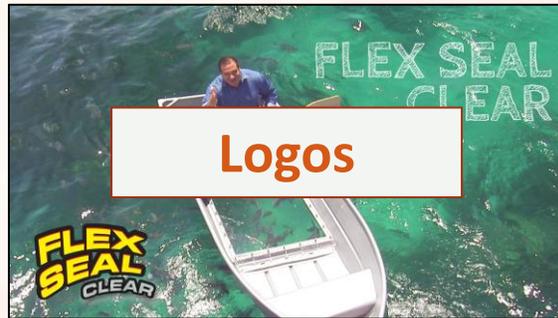


- **Definition:** Appeals to reason. Logos can also be thought of as the text of the argument, as well as how well a writer has argued his/her point.
- **Timing of Logos:** Anytime
- **Formality :** *any* argument that relies on or even just claims to rely on “facts” to appeal to a listener’s reason is still an example of logos – e.g., proof vs apparent proof
- **Examples:** Cause/effect, deductive reasoning, inductive reasoning, exemplification, elaboration, coherent thought

# Ideas of Argumentation, Classical (2 of 3)

Map the examples of appeals to persuasion

Example 1 – Flex Seal



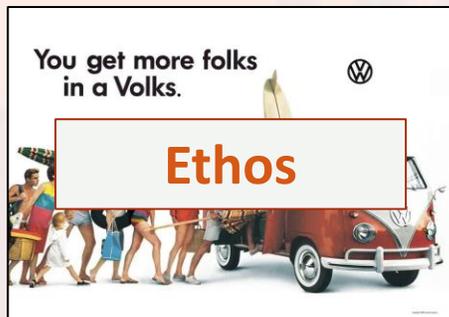
Example 2 – Axe Body Spray



Example 3 – Colgate



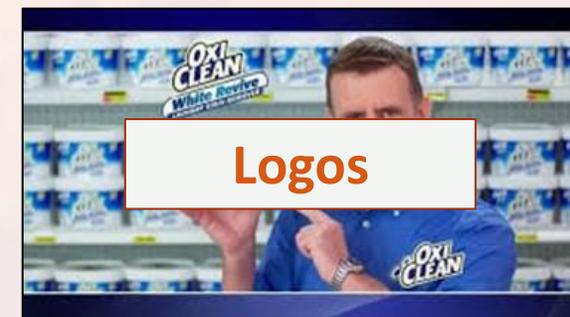
Example 4 – Volkswagen



Example 5 – Coca-Cola



Example 6 – OxiClean



# Ideas of Argumentation, Classical (3 of 3)<sup>1</sup>

Developed as guidelines for the creation of a presentation, use the five canons as a guide to refine your work during the process of creation

Canon	Description
Invention	<ul style="list-style-type: none"> <li>• The process of creating material for a text</li> <li>• Example: producing major points during a debate</li> </ul>
Arrangement	<ul style="list-style-type: none"> <li>• The process of deciding how to order the material in a text</li> <li>• Example: prioritizing to discuss the more severe charges first in an open statement</li> </ul>
Style or Diction	<ul style="list-style-type: none"> <li>• The process of figuring out the actual words that will be used in a text</li> <li>• Example: choosing active voice instead of passive voice</li> </ul>
Memory	<ul style="list-style-type: none"> <li>• The process of committing a text or selected portions of text to memory</li> <li>• Example: memorizing key points of a speech</li> </ul>
Delivery	<ul style="list-style-type: none"> <li>• The process of presenting a text to an audience</li> <li>• Example: speaking in a loud voice or pounding the podium</li> </ul>

***If you have questions at any point, feel free to reach out to a counselor to help***

# Drivers of Human Thought & Knowledge

Understanding the basics of Psychology can be useful to understand what makes people think the way they do and help ease various roads to persuade others

## Empiricism

- Knowledge that is derived from experience and experimentation
- If this is true, what impacts does this have on persuasion & storytelling?



*“Reason is, and ought only to be the slave of the passions, and can never pretend to any other office than to serve and obey them”*  
 – David Hume

## Rationalism

- Knowledge that is derived from reason and logic, e.g. separation of mind and body
- If this is true, what impacts does this have on persuasion & storytelling?



*I understand the mind to be indivisible by its very nature. I understand body to be divisible by its very nature. Therefore, the mind is completely different from the body.*  
 - Rene Descartes

# Basics of Storytelling

## What is Storytelling

- People are attracted to stories, because we're social creatures and we relate to other people
- Crafting a narrative and speaking to a theme
  - “The most successful storytellers often focus listeners’ minds on a single important idea” – Harvard Business Review, 2014
  - Moe Levine, a successful trial lawyer, and the “whole man” theory & the client who lost both arms



“As you know, about an hour ago we broke for lunch. I saw the bailiff come and take you all as a group to have lunch in the jury room. Then I saw the defense attorney... He and his client decided to go to lunch together. The judge and court clerk went to lunch. So, I turned to my client, Harold, and said “Why don’t you and I go to lunch together?” We went across the street to that little restaurant and had lunch....Ladies and gentlemen, I just had lunch with my client. He has no arms. He has to eat like a dog. Thank you very much.”

## An Example of Storytelling

1. Pleading
  2. Discovery
  3. Pre-trial
  4. Trial
    - a) Opening Statements
    - b) Presentation of Evidence
      - i. Examination
      - ii. Cross-Examination
      - iii. Re-Examination
    - c) Rulings by the Judge
    - d) Instructions to the Judge
    - e) Closing Arguments
  5. Post-trial
    - Appeal
- In a trial setting, be sure that you adhere to the process – minimize interruptions
  - Think about who you are appealing to...
    - Argument to a jury
    - Argument to a appellate judge
  - The one of worst thing you can do is confuse a witness during examination
    - Take a step back and ask yourself where you want to go

# Applying Rhetoric & Storytelling

Discourse: Eristic, Dialectic



# Applying Storytelling, the Consequences of Crafting a Poor Story



## The Apology Story

- The defendant, a law firm, and the plaintiff, a large publicly traded firm accuses the law firm of malpractice for not informing shareholders of their fiduciary responsibility – expert witness is being cross examined
- The defense attorney asks a simple question about a document and the expert witness has never seen the document, which is a memo disclosing the shareholder’s fiduciary duty
- Poor case + poor procedures → millions of dollars lost & an ultra-rare apology from the plaintiff

## The Layoff Story

- Better.com CEO, Vishal Garg, fired over 900 employees over a one-way video call... Just after the firm received \$750M of cash & was valued at \$7B...
- In a monotone voice said: “This is the second time in my career I’m doing this, and I do not want to do this. The last time I did it, I cried; this time I hope to be stronger.” He apologized, but this message leaked:
- “HELLO—WAKE UP BETTER TEAM. You are TOO DAMN SLOW... bunch of DUMB DOLPHINS and...DUMB DOLPHINS get caught in nets and eaten by sharks. SO STOP IT. STOP IT. STOP IT RIGHT NOW. YOU ARE EMBARRASSING ME.”

# Applying Storytelling – Understanding Narrative & Applying an Argument (1 of 2)

## Low Stakes

### What is Value?

*Understand and define the components of a story to properly apply a well-formed narrative to persuade a sale*

- You are in vacation in Mexican beach during the off season to save some money and you see a jet ski rental for \$80 for two hours – the resort is mostly empty and full of families not young adults like you.
- You go over to the vendor because you want to go on the jet ski for the day and you have a budget of \$100 per day during vacation.
- What is the difference between price, cost, and value between the vendor and you so that you can go over and negotiate?

## High Stakes

### Getting Pulled Over

*Understand and define the components of a story to properly apply a well-formed narrative to sell the*

- You are driving and realize that a cop turned on their headlights and pulled you over, he walks up and asks the standard items for license and registration.
- Then they ask: “do you know how fast you were going?”
- You sit there wondering what to do next because you really want to go about your day.
- What is a valid response that will get you going?

# Applying Storytelling – Understanding Narrative & Applying an Argument (2 of 2)

## Low Stakes

### What is Value?

#### *An Answer:*

- For you: you have some cards to play with when going over to negotiate but you must recognize them to get the best deal... it doesn't hurt to ask too
  - Price: negotiable but stated as \$80 for two hours
  - Cost: time and money
  - Value: enjoyment on the vacation
- For the Vendor: they must realize that you have the upper hand for today if they are smart
  - Price: negotiable but willing to go down
  - Cost: Cost of gas, machines, rent(?), etc.
  - Value: Livelihood, may not make a sale for the day

## High Stakes

### Getting Pulled Over

#### *An Answer:*

- Be polite and respectful at any time, you can lose credibility immediately.
  - Ex: a snarky response or failing to comply with the license and registration request may escalate the situation... maybe even have your documents already out and your hands visible (to ease the nerves of the officer)
- The officer is potentially coaxing you to admit guilt and save time out of his day. Respectfully stating that you were going about your day, and you were going below the speed limit: (1) signals to them that you know your rights and (2) that you don't want to escalate the situation

# What Does This Mean For Boys State

## Advocacy

- Most positions are geared towards advocacy and all appointed positions have an advisory component:
  - Councilmen, Representatives, Justice of the Peace, Board of Supervisors, Superior Court Judge, Treasurer, County Attorney, Senators, Governor, Secretary of State, Attorney General, State Treasurer, Supreme Court Judges...
  - Appointed positions have a direct line into advising their respective individuals
    - Advocacy for clients or advisory on areas of expertise is an active process – it is your responsibility to be present and answer questions for your clients, constituents, or leaders to the best of your ability
    - In the real world it is about making a roadmap for the daunting or impossible to happen

## Speeches & Relationships

- Understand what the audience wants:
  - Note they are incredibly pressed for attention and time
  - During competitive environments (e.g. Boys State) focus on creating a lasting and good impression
  - Keep it simple stupid
  - Show don't tell
- Good Vs. Great speaking
  - Proactive
  - Empathetic
  - Self-awareness
  - Motivational

# Rhetoric as a Tool & Its Purpose With an Advisor

Using rhetoric within an advisory role can be useful as it helps understand the positions of others and how to optimize life choices to maximize optimal outcomes for an end, especially at Boys State

## Advisors

- Advisors have a unique and competitive position where they can sway the opinion of those that they are assisting
  - The role can extend to various positions and times of deliberation of decision making
  - The business is trust based and this can never be overlooked
  - There are numerous careers that involve advisors and advocacy on a daily basis, starting to think if its for you now is a good steppingstone
- Advisors use rhetoric and storytelling as a tool to assist those that they advise and those that they interact with

## Rhetoric & Storytelling

- Rhetoric & Storytelling is a tool like anything else – and like anything else you need to practice and learn to get better at it
  - Rhetoric was previously recorded for use as a political tool
  - As time progressed it was developed into public oration and various methods to execute flawlessly
  - Storytelling is the thread that connects an argument together
- Incorrectly telling a story or forming an argument can be detrimental to your cause
  - Its very easy to overstep or miscalculate the effect of a position...
  - At Boys State give everything a try, put yourself out there

# Q&A

