Managing up: Helping your boss to help everyone else (including you!)

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Two things first...

1) Know who you're dealing with and know who **you** are

- Get beyond just titles and roles in the hierarchy!
  - Those are important pieces of information, but they tell us way less than we like to think they do

2) Understand your organizational culture

- Is it one of sharing/collaboration/open mindedness? Or is it cutthroat/ruthless/and "every person for themselves"?
  - If it's more the latter, any type of managing up or equipping others to manage up to you will likely be poorly received

Anticipate

- What are the big things coming up on their/the organization's calendar (Board meeting, shareholder feedback, Strategic Committee, etc.)?
- Provide information in DIRECT reference to these events to help them more easily organize and prioritize
  - "I know that the Board is looking for updates on our cost overruns from Quarter 3, so you'll see in this chart that I've broken that out…"
- Become a better researcher (no, you don't have to become a boring academic!)
  - Read trade publications, newspapers, websites, listen to podcasts, etc.
- It is important, of course, that you don't let their timelines throw you off any of your own relevant timelines! Yes, that's a tightrope to walk!

Stop Whining

- Kidding! Sort of…

- A good rule of thumb for managing up: if you're bringing a problem up, it's best to provide at least one potential solution or insight

- The absolute best is being able to provide several solutions/insights, each concisely stated, with a clear recommendation of what you think would be best (with a clear rationale)

  - "Here's the issue, here are the root causes, here are three options to deal with this, but I think #2 is the best option because it gives us…"

- Don't bombard them with data (it shows you can't analyze and is overwhelming) and prioritize your feedback (get to the point)

Help them to hear you

- The best information, unartfully delivered, is wasted
- Going back to "knowing your people", figure out the best way to help the person you're talking to actually hear you/make use of the information
  - Charts, figures, in-person, voice recordings, one-pagers, etc.
  - Again, sometimes this is best delivered with a clear reference to an upcoming need they have (Anticipate)
- Giving good news is always easier (this doesn't negate the need to make sure it's presented in a tailored way); bad news or disagreements need even more nuance
  - One rule of thumb: just as in general leadership, it's best to praise in public and scold in private
  - If you're going to disagree with a boss, it's usually better to do it in private to avoid it being about egos, not the issue/information

Help them trust you

- Engage constructively (usually 3 ways):
  - Agree and support moving forward
  - Agree with additional insights or information ("Yes, and…")
  - Disagree with clear rationale and evidence
- Focus on the good of the group/big picture, rather than getting into ego battles
  - All business is personal, but you need to be able to balance these factors to have productive engagements
- Be accountable
- Acknowledge others and give credit where it's due

Look at the person in the mirror

- OK, so you've got a plan for your bosses....have you set up the people under you (and yourself!) for success?

- Be clear about who you are (values!)

- Be clear about your expectations of others

- Be clear about major issues/timelines you have

- Are you as open to feedback as you probably *think* you are?

- How many ways do you have to reward people?
  - Most have narrowly framed 1) money and 2) promotions and that's it
  - Hierarchical structures are, almost inherently, likely to lead to fewer incentives to manage up and actually more incentives to back stab

- Is your organization segmented or integrated or networked?
  - Easiest way to check this is how (and how well) information flows
  - Segmented is easiest (and rarely needed), integrated is a bit more complicated, and networked requires complex thinkers

- Are you hiring for fit (long term) or for open jobs (short term)?
  - Related: what's your development plan like?

Any Questions?

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