



HOW TO **MANAGE UP AND ACROSS**

If you have a supervisor, peers, partners, a board, or volunteers to lead, this bonus is for you.

Managing up and across are just as critical as managing down. Many of the basic skills of managing up and across are covered in *Module 2: Creating Constructive Conflict*, *Module 3: How to Unlock Performance*, and *Module 5: Make Better Decisions Faster*. Each of these trainings contributes important elements to the process.

While most of the principles are the same, some of the power dynamics require slightly different tactics.

In this bonus you will learn...

- The critical, but overlooked role you play as a direct report
- How to say “no” without being seen as lazy, insubordinate, or disagreeable
- To how play healthy politics, even if you hate it.

THE POWER OF A BOSS

The number one reason people leave a company is due to their direct manager. That means more often than not, people don't leave companies, they leave leaders.

It makes sense. Your boss determines 70% of your work experience. That's a lot of power a manager has. And most of us at one time or another have had to work for less than ideal supervisors.

So, what do you do when you have a boss who is...

- ...not as smart as you
- ...emotionally abrasive or abusive
- ...overly critical
- ...focused only on the negative

- ...out of touch with reality
- ...too tangled up in the weeds
- ...inexperienced in your field
- ...detached or distant
- ...lacking credibility
- ...lacking team buy in
- ...new to the organization
- ...friendly but trying too hard to be liked
- ...lacking self-awareness
- ...indecisive, inconsistent, or unpredictable
- ...uncommunicative
- ...too agreeable and passive
- ...or some variation of all of these?

We won't be addressing each of these cases above specifically, instead I'm going to focus on the underlying themes common to all of these challenges.

RETHINKING YOUR ROLE

When we talk about "managing up" we are not talking about manipulation, self-promotion, or trying to get enact your agenda instead of your supervisor's. The deal is, you are hired to support and make your supervisor successful, even when you don't feel like it.

Instead, at the heart of this process is understanding the role you play in the life of people who you have no authority over. I'll give you three simple metaphors to play with.

1. You are a MIRROR

A mirror reflects back information undistorted and without judgement. It is just information. In this case, as a mirror your role is to reflect back accurate information about how you experience your leader.

In this metaphor the focus is on providing your manager accurate feedback about how her approach is affecting you.

One of the hardest things in leadership is not knowing how your people truly experience you. As a mirror you reflect back what's happening without trying to change that person. When they can see, at least they have a choice.

2. You are a GAUGE

Like a gauge in the dashboard of a car, you are a sensor of what is going on in a system or organization. You can see things others can't by virtue of your unique vantage point, line of sight, direct experience, responsibility, or skills.

As a gauge your job is to sense what is and then provide meaningful and relevant information to your boss. Meaningful and relevant information supports the second role you play.

One difficult aspect of leadership is just how often we are flying blind, unclear on what's really happening on the ground. This is especially the case as an organization or team gets bigger.

3. You are a GUIDE

More than just a gauge you are also proactively providing guidance. A guide is someone who facilitates the decisions of others. They do not decide for them. This is about providing context and direction for the information.

A guide can see things others cannot and then recommend a path in response. That's the key word "recommend." They don't dictate or control an outcome. Ultimately, the decision resides with the other person, in this case the manager.

As a leader you often get conflicting information or input at odds with your own perspective. It's often hard to know when to push back and follow your original course of action in the face of resistance and when to listen and adjust course based on input.

When you play the role of a guide for your manager, you make that process easier a little easier, and that builds your credibility, trust, and value.

In a later section, I'll introduce a few techniques to show you how all these roles work in practice.

EASIER SAID THAN DONE

Now all of this talk of guides and mirrors may sound nice in theory, in reality we all know playing these roles much easier said than done.

Most of the time it doesn't happen. More often than not, the leader is flying blind (at least partly) and has no idea how the team is really doing. They fail to get the information they need, or don't know who to trust in the process.

Followers can be wary of a leader's power or possible retaliation and decide to pull punches. That means leaders don't get good information. They end up staring into a curved mirror or a malfunctioning gauge, but don't know it.

Leaders can be a little dismissive of direct reports who say no. They may wonder if they just don't feel like it or agree with it.

If your boss exhibits any of the signs I listed at the top (or if you do), then you can bet the information isn't going to flow up very well. Either the boss will have difficulty hearing it, or more often, you won't feel motivated to share the information.

I've heard all the reasons why people stop playing these critical roles for their manager, here are the top 5:

1. "My boss doesn't get it"
2. "He doesn't like to hear bad news."
3. "She doesn't listen to us, what's the point."
4. "He seems on board, but never does anything about it."
5. "I can't always be the one telling her the truth."

These can all be boiled down to either frustration or fear. The frustration of feeling like your ideas won't be taken seriously and fear that it could come back and get you later.

These are completely understandable emotions that come from working in a hierarchy. And while those feelings may not disappear entirely, here are a few things that can help make it easier.

HOW TO PLAY THE ROLES:

The work of playing the role of mirror, gauge, and guide for your boss comes down to two things:

1. *Courage*
2. *Communication.*

You need some courage sometimes to have the conversations, and you need to figure out the best language to convey the information, so your boss can hear it.

Here are a few things to remember to help you figure out what to say and when:

1. Step into Their Shoes:

For a moment try to occupy the world of your boss the best you can. You won't understand it fully, but even the effort makes a difference.

Ask yourself, what are her goals? What does she need to really win? What tensions is he managing that you can't see? What may look like an obvious mistake to you, could be the right move for him given the other tradeoffs he's managing.

Respect the fact that your boss may have line of sight you don't have and a set of pressures and responsibilities you don't know about.

This is pretty common refrain I hear as people get promoted. "I have a lot more sympathy for my former boss now."

2. Remember Your Role

Your boss doesn't just pay you to do your job, he pays you to be a mirror, gauge, and guide (even if he doesn't know it). He needs good information from you to have a shot at leading well.

Remind yourself, if you were in your boss's shoes, you would want the best information possible.

3. Connection with Your Courage

If you're feeling anxious about sharing difficult information, or mirroring back a negative encounter, or trying to give advice on which way to go, remember to reconnect with your courage.

Under Module 5, Video 6: Activating Courage, You can find a guided audio meditation to help with this called "Connecting Courage Guided Practice (audio)"

4. Find the Right Language

The words you use have the power to influence the choices other people make. They have the power to trigger a negative reaction or compel a positive one.

In Module 3, Video 11: Throwing Switches I introduced the idea of finding little phrases that help set conversations on the right track. Some of the switches found in that training are relevant here. Below are a few scripts that include more specific switches for the unique roles you are playing:

THE MIRROR SCRIPT:

When you play the role of the mirror, that means at some point you will need to let your boss know about an interaction that went badly for you.

Consider starting with the following script to prepare for that conversation.

"I wanted to share an experience with you. I think if I were in your shoes, I'd want to know this.

In our last interaction when you said (or did)_____.

Describe their words or behavior, not their motives or an assessment of their character.

For example, "when you said you thought I was lazy."

Or "when you expressed your dissatisfaction with me in front of the team." Or "when you focus your attention only on our screw ups."

I experienced it as_____.

Or the effect it has on the team was_____.

Describe your experience or observation.

Words to avoid:

Be careful not to use words that give your power away (i.e. "it was hurtful" or "I was frightened," or "it made me insecure." etc.). While these are likely very true, and important for you to know about yourself, in this context it doesn't serve you to share them, most of the time.

Instead use words that are more focused on what your boss wants and empowering for you. Most bosses want their teams *motivated, clear, empowered, aligned, stable, efficient, and productive*. So pick words that express the opposite of these. Words like:

*demotivating
demoralizing
disempowering
undermining
confusing
frustrating
destabilizing
inefficient
unproductive
exhausting
provoking
embarrassing*

What I most want is _____.

Make a statement about your positive goal and link it to what you know your boss wants. "What I most want is to perform at the level you need." or "to support to make sure we get this done in an efficient way." Or "to avoid needless mistakes." Etc.

**I think you'll get better performance from me _____
Or it helps my performance when _____.**

Present an alternative way for the leader to do what he did. For example, "if you focus your feedback for me on my words and behavior

rather than assigning motives.” Or “when you take me aside privately to tell me your frustrations.” Or “when you are able to see our mistakes in the larger context of our successes.” Etc.

Finish with a positive example, if you have one

You can finish your script by observing a time when your boss interacted really well, and it achieved his objective, while still keeping you motivated. Describe the positive effect it had on you.

THE GAUGE SCRIPT:

When you play the role of a gauge, most often you are providing information and feedback about how the leader’s decisions are impacting the people on the front lines, or whether things have gone wrong, or if there’s a crisis of some kind.

This information can often be unwelcome and you could be put on the spot for it. People often want to avoid being a gauge for fear the boss will shoot the messenger.

When delivering bad news, consider using a few preambles designed to prepare your boss emotionally. Often preparing them helps them to respond better:

“I don’t think you’re going to like what I have to share, but it’s important that you know about it...”

“Normally this is something I would address without involving you, but I think you’ll want to weigh in on this...”

“I have a pretty good sense what I’m going to suggest is not something you are enthusiastic about, but I wouldn’t share it if I didn’t think it was worth considering...”

And the list goes on. In addition to a preamble, consider three other important elements to serving as a gauge:

1. Make sure you share in a timely manner. Don’t wait too long or it could come as quite a shock and be too late to resolve.

2. Always bring a few proposed solutions even if they are not great solutions. It shows your supervisor you are bringing value not just a problem.
3. If what happened is a mistake you made, own up to it directly and fully. This will establish you are a person who can be trusted and take away some of her thunder if she wants to express her frustration at you.

THE GUIDE SCRIPT:

When you play the role of the guide you are working to facilitate the best decision possible.

The subtext for this role is this. Sometimes your boss will ask you to do something that you disagree with, think is a waste of time, believe won't be effective, or worse could work against your boss in a meaningful way.

When this happens it's your job to let her know. The problem is that very often your resistance is interpreted as having a hidden agenda. Perhaps you just don't feel like it, or maybe you want to spend your time a different way. If that's the case, then get honest with yourself first.

If it's not the case and you have a real concern about a course of action, here's a effective way to serve as a guide.

1. Detach yourself from the outcomes

A critical aspect of your credibility hinges on how well you can remove the emotional charge you feel around a directive. In general, the more emotionally attached you are to any course of action, the more your boss will have a tendency to resist it.

I know that sounds strange, but it is a built in dynamic. People don't like to feel pushed, cajoled, or manipulated. They don't want to feel responsible for your emotional life. Highly charged emotions inhibit your ability to help your boss make a good decision.

One way to help you get there if you're feeling strongly is step 2 below.

2. Use a Guided Discovery Process

To unpack this, let's use a metaphor of driving. If your team is headed down the road together and your boss says "We need to go left, that's a shortcut" and you can see there's no road to the left only a vacant lot with debris.

You have a couple of options for responding.

- You could just go along with what he says because he's the boss and you don't want to appear too negative.
- You could tell the truth as you see it and say, "It's a mistake to go left, we can't do that, there's no road, we should keep going straight." It's a solid conclusion based on obvious facts.

Both of these are valid options but come with limits. The first one results damage to the vehicle and possibly the people in it.

The second one is probably accurate, but comes off as obstinate and bossy, which instantly erodes your credibility and makes it less likely you will be heard. There is a third option.

- Use a **guided discovery** approach. Here's how that looks:
 1. Imagine all options are neutral. Don't privilege one over another to start.
 2. Identify the realistic choices and then detail their outcomes or consequences. Every choice has a consequence, that part is unavoidable. It's only a question of which consequence you want to choose.
 3. Make your recommendation. You can have a strong preference but don't get attached to it. This allows you the flexibility to pivot as needed.
 4. Align with whatever decision is made. Remember alignment isn't about agreement. You can still disagree, register your dissent, but publically support the decision in behavior and words.

Here's how the guided discovery process looks in practice using the driving example above.

"Before we turn left, can we explore our options and implications?"

Option 1: We go left, it may get us to our destination faster. But we may sustain damage to the car, which could cost money and ultimately slow us down.

Option 2: We continue on our course, this may take a little longer, but we save money by not having to repair the car.

My recommendation is Option 2, I think it gives us the best chance of success. But I will accept and support whatever you decide."

I realize this example using this metaphor sounds a pretty silly, but this is a very effective practice in organizational life when the issues are more complex.

The guided discovery approach gives you flexibility to allow new information to correct your thinking without overcommitting to a position.

MANAGING ACROSS:

When you work in an organization where you have peers and other stakeholders where you don't have authority, but you depend on them to accomplish goals here are a few suggestions to keep in mind.

Pay attention to Politics:

In the case of working with organizational peers where you don't have formal authority over them, one of the inevitable forces you must contend with is politics.

"Politics" is a vague catch all term. But it can be broken down into more concrete behaviors, things like:

- Hidden agendas
- Invisible use of power
- Creating alliances
- Control of information

- Leveraging loyalties
- White glove treatments (when someone inflicts punishment on others while wearing white gloves so their fingerprints are not left behind)

You'll notice the common thread in politics is that all these elements are invisible. That's because you're dealing mostly with the control of information, that is the source.

Politics is a lot like poker. You have to be quite strategic in knowing what cards to play, which cards to let people know you have, the cards you want them to think you have, and which cards to keep hidden.

This may all sound very manipulative and underhanded. It certainly can be depending on your motive. There is a real dark side to this art. Many people use it to create win/lose scenarios to further their own agenda regardless of the impact on others or the mission of the organization.

Some people are naturally very gifted in this, other are not, still others find the whole thing distasteful. They say with pride "I'm not political. I don't want to get caught up in that."

I have learned the hard way that if you don't understand and work with the tools of political dynamics, you will become less effective at your job.

I've known many very well-intentioned leaders, full of kindness, who were terribly ineffective in a system because they just naively left all their cards open on the table. They were rendered impotent in the process.

Politics Can Be a Form of Service

Here's the problem. Whether you like organizational politics or not, they exist. Not only that, they can be a powerful force in creating powerful win/win outcomes. Utilizing political dynamics with wisdom and kindness can actually serve others and the larger goal of the organization.

Here are a few simple suggestions to help you get started in this art form.

1. Know that politics exist in every system.

Even in the most apolitical or mission driven organizations, politics will exist. The higher you go, the more political realities become essential.

2. Commit to creating win/win scenarios

Get yourself clear in each choice you make. Ask how what you are doing might serve the larger goals of all parties involved. Don't just try to serve everyone else. You are your power matters, you will need it to accomplish what you are there for.

3. Pay attention to informal power, relationships, and loyalties

it's what you can't see that can cause you the biggest problems, work with those informal powers, not against them).

4. Notice how you tend to play your cards

Do you tend to show everyone everything because you hate politics? Or do you tend to withhold everything because you want to stay safe and hold power? It's all about appropriate information flow. Be conscious about how information may help or hurt yourself or others. Either extreme will lead to problems.

5. Be generous and kind, but not naïve:

Often giving some power away is a powerful way to get more power. People begin to trust that you wield your power with wisdom and deeper purpose. However, you will need to hold some cards near your chest and recognize that not everyone is playing for a win/win.

6. When you get burned, don't take it personally, learn from it.

Inevitably when you seek to perform at a high level in a complex system, there will come a time when someone who is not playing for a win/win will out maneuver you. You could get burned or set back in your efforts.

When this happens remember two things: First, its normal, happens all the time even to highly skilled political animals. Second, use the experience to create a more sophisticated understanding of political dynamics that you can use later to help everyone.