

Managing Up: An Essential Tool

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Team member, project manager, or practice manager, you have a boss, or in some cases, multiple bosses. You have to worry about those bosses and their needs. "Managing up is the process of consciously working with your boss to obtain the best possible results for you, your boss, and your organization. This is not political maneuvering or kissing up. Rather, it is a deliberate effort to bring understanding and cooperation to a relationship between individuals who often have different perspectives." [Thomas Zuber, Erika James]

Management or Manipulation?

Managing up or managing the boss is not another term for manipulating the boss or being the boss's toady. Managing the boss is a way to have a win-win-win situation where everyone including the organization wins. Failure to manage the boss can result in misunderstanding about expectations and cause wasted time and effort on tasks not in line with departmental or organizational goals or the project's needs. And looking at it from a purely self-serving perspective, career progress rarely happens if you don't manage your boss successfully.

If you are a supervisor or manager at any level, you have to think about managing both up and down. It is the managers who only manage up who give managing the boss a less-than-stellar reputation. They appear to be the suck-ups; subordinates assume they don't care about them and may withhold their respect or slack off in their work. On the other hand, the ones who only manage down can't advocate for their team or gain buy-ins for the project's endeavors from those up the chain. Successful managers pay attention to managing both directions and communicating with their peers.

Guidelines for Managing Up

Communicate—and make sure the communication is two-way. Good communication skills are the basis for being able to succeed in almost every situation. Communication with the boss can be verbal or written. Some bosses are readers, meaning they prefer to receive information in written form. Others are listeners, meaning they prefer to get their information verbally. If you want your ideas to be heard, understood, and acted upon, make it easy for your boss by communicating in the manner with which he/she is most comfortable. You'll be meeting your boss's needs as well as your own. Remember to listen and ask questions to understand the boss's wants and decisions. It is also a good idea to feed it back to confirm that you got it right.

No surprises—don't surprise the boss. Even good surprises can backfire on you. Let her/him know what is happening with the project or practice on a regular basis so that she/he can brief their boss. It may be a quick meeting; a daily, weekly, or monthly e-mail; or some other exchange. Full-blown interim progress reports on a regular schedule can help make sure that neither of you is surprised.

Provide solutions, not problems. There are going to be problems with your operation or project. But when you let your boss know about those problems, give him/her your proposed solution. That shows him/her that you have thought the situations through. There are supervisors who seem to want to hear only good news; they don't want to hear about problems. Those bosses represent a particular challenge. It is up to you to help your boss face problems head on with courage and innovation. For the good of the project or operation, and the organization, you must communicate

problems and failures with the successes, but do so delicately and appropriately. That's when providing proposed solutions to the problems can really pay off.

Be honest and trustworthy. Dishonesty, covering up problems or failures, and trying to sweep things under the rug, will only hurt you and the project or operation in the long run. The truth will come out eventually. Bad news doesn't get any better with age. A key element in managing your boss is building trust by being trustworthy. Most people are dependable, hard-working, and have a desire to do a good job, but because of misunderstandings or mismatched priorities, some end up inappropriately labeled as problem children. To avoid that label, maintain your honesty and dependability. One way of doing this is honoring commitments, project schedules, and constraints. The best way is just honest and forthright communication.

Be loyal and committed. She's your boss and you owe her your loyalty and commitment, and she owes you her support. If you don't do your part, changes are that she won't do hers.

Understand your boss's perspective and agenda—that way, you can align your priorities with your boss's priorities. Put yourself in his shoes. While many people think that they have an understanding of their boss's goals and pressures, they don't always understand the strengths, weaknesses, aspirations, and work styles of their supervisors, or the pressures and constraints on them. Exploring these will help you identify commonalities you never knew existed and gain a little insight on how to better interact effectively with your boss.

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Understand your boss's preferences— and try to conform to them. If he wants a daily report on what has been accomplished, give it to him. If she wants the big picture and not the details, give it to her. If he wants something in a specific format, give it to him. That doesn't mean that you can't try to show her/him a better way, but remember to use tact and diplomacy. If you get crosswise with your boss, even over something minor, you may never be able to undo the damage. One of the worse mistakes you can make is to assume you know what your boss expects. Many bosses don't spell out their expectations, and the burden of discovery falls to you. If he doesn't give you the information that you need, initiate one or a series of informal discussions on "our" objectives. This can help your boss clarify and communicate his ideas, plans, and needs to you; and it gives you the chance to communicate your own ideas as well. Together, set realistic expectations on schedule, costs, and the final product/outcome. Don't set expectations too high or you will ruin your credibility when they are not met and don't set them intentionally low—that won't help you either.

Understanding your own work style— developing an effective working relationship with your boss requires that you understand yourself and your management style. Recognize your own strengths, weaknesses, goals, and personal needs; how you respond to being managed; and how others respond to you. Be aware of the effect that you have on others and their reaction to you, especially those under you. If you don't, you could be in for a surprise when you meet with the boss. The boss probably talks with some of your people and has an idea of their reactions to you.

Depend on your boss's strengths— and use them. Whether those strengths are communication, seeing the big picture, resource management, new ideas, or something else, go to your boss for his/her expertise. Remember though, that time is a precious commodity for most leaders. Effectively managing your boss requires that you respect his/her time. Every request

made of the boss uses up their time and resources, so make sure your requests are necessary; if you can do it yourself, don't waste his/her time.

Recognize your boss's weaknesses— and compensate for them. Your boss will not be good at everything. It is up to you to figure out where he's weak and provide your support in those areas.

Be aware of your boss's hot buttons— and pet peeves. Is it being late to meetings or not contributing, sloppy memos or e-mails, swearing, loud side-conversation? Sounds obvious, but whatever they are, consider them land mines to be avoided. Ignoring them or not understanding them can sour your relationship with the boss. And that can mean an unsuccessful work outcome because you didn't get the support that you needed—or worse case, it can be career suicide for you.

Request feedback— and learn to accept it. Request periodic feedback if you aren't getting it. Don't wait for the annual appraisal to find out the boss's opinion of you and your work. If you get bad feedback, discuss your concerns, but do it on a mature level, not emotionally or confrontationally. Listen to what she says and try to act on it.

Don't go over the boss's head— or behind his back. That is not the way to manage up and can permanently ruin the relationship with the boss. Go to him first. If it is something very serious and he does nothing, you might have to go over his head but this action should be a last resort and done only if:

- Your project is on the line and there is an urgent problem that your manager continues to ignore
- Your boss is doing something illegal
- Your boss has a serious physical illness, mental illness, or substance abuse problem that you are aware of
- Your boss is doing something that could lead to a lawsuit and/or bad publicity such as a HIPAA violation, sexual harassment, or contracting irregularities

In such cases, be very careful to keep the information highly confidential, discussing it with only anyone who needs to know. Tread carefully, you could be mistaken. UC has

policies that can show you how to "blow the whistle" and can protect you from retaliation if the need arises. More information can be found at <http://ucwhistleblower.ucop.edu/>.

Managing up sounds simple, but managers, and everyone else, need to learn this basic concept; "If we want someone to understand what we have to say, we must learn to speak their language, rather than expect them to learn ours." By learning your boss's language you can accomplish what you need, help the boss succeed, and make the organization a success. [Richard L. Knowdell, *Building a Career Development Program: Nine Steps for Effective Implementation*].

10-Rules for Mgmt Success

1. **Hire good people—**it makes being successful easier.
2. **Give them the tools that they need—** give them the equipment and training they need to do their job.
3. **Tell them what you want done—** tell your employees the results that you want then get out of their way.
4. **Set high expectations for employees and yourself—** people tend to live up or down to expectations set. Aim high!
5. **The mission is first priority—** getting the job done and done right has to be your priority.
6. **Plan, measure, and plan again—** without a plan, you may get to your destination in the end but it will most likely not be by the best or most expeditious route. As part of your plan, you need some way to measure how you are progressing.
7. **Take care of your people—** recognize them when they do something good and correct them when they do something wrong. Praise in public, correct in private.
8. **Go walkabout—** management by wandering is a great way to find out what is *really* going on with your people and practice.
9. **Don't ask anybody to do things that you wouldn't do yourself—** this does not mean you shouldn't ask employees to take on special projects or do tasks a manager cannot do; it does mean not asking them to do personal things for you or things not a part of their jobs.
10. **Communicate, communicate, communicate—** up the chain, with your peers, and with your employees. It's failure to communicate that gets rumors started; the truth is always better even if it is bad news.