Learning Objectives

1. Understand the concept of “managing up.”
2. Identify opportunities for managing up in academic organizations.
3. Clarify the skills involved in managing up.
4. Recognize four basic styles of leadership.
5. Match interaction styles with leadership styles for managing up.
6. Understand the pitfalls of managing up strategies.

What is Managing Up?

- aka “Upward Influence”
- Directing relationships with those to whom you report
- Influencing inter-dependent relationships
- Exerting influence beyond your area of direct responsibility
- Getting what you want (more or less) from your boss
When is Managing Up Useful?

When my boss doesn’t seem to:
• Want to implement my plan
• Know how to adopt a “winning” strategy
• Acknowledge the problem we’re facing
• Understand my point of view
• Share our departmental vision
• Work to influence others to support us

Foundational Skills for Managing Up

“IT”
Facts, Tasks

“Others”
Relationships

“I”
Self-Management

objectivity, creativity, analysis, forecasting
openness, appreciation, interdependence
knowledge, consistency, self-observation,

What You Need to Know:

about yourself…
• Strengths
• Preferred work style
• Major goals
• Weaknesses, blind spots
• Pressures & stressors
• Immediate concerns

about your boss…
• Vision & Goals
• Career Objectives
• Strengths
• Weaknesses
• Pressures & stressors
• Immediate concerns
• Preferred work style
... and about the Goal or Task
- Is it a good idea? Why?
- How will it work?
- Who will carry it out?
- How much will it cost?
  - Financially?
  - Socially/Politically?
- What are the obstacles?
- What about timing?
- Will it be accepted?

Strategies for Managing up
- Rational Persuasion
- Inspirational Appeals
- Personal Appeals
- Ingratiation
- Pressure
- Coalition Tactics
- Exchange
- Consultation/Collaboration
- Legitimizing


Rational Persuasion
- The agent uses logical arguments and factual evidence to persuade someone that a proposal is viable and likely to result in the attainment of task objectives.
Inspirational Appeals

- The agent makes a request or proposal that arouses enthusiasm by appealing to larger values, ideals, and aspirations, or by increasing target self-confidence.

Consultation

- The agent seeks target participation in planning a strategy, activity, or change for which support and assistance are desired.

Ingratiation

- The agent uses praise, flattery, friendly behavior, or helpful behavior to get the target in a good mood or to think favorably of him or her before asking for something.
Personal Appeals

• The agent appeals to target feelings of loyalty and friendship toward him or her when asking for something.

Exchange

• The agent offers an exchange of favors, indicates willingness to reciprocate at a later time, or promises a share of the benefits if the target grants a request.

Coalition Tactics

• The agent seeks the aid of others to persuade the target to do something or uses the support of others as a reason that a request should be granted.
Pressure

• The agent uses demands, threats, frequent checking or persistent reminders to influence the target to do what is wanted.

Legitimating Tactics

• The agent seeks to establish the legitimacy of a request by claiming authority or the right to make it or by verifying that it is consistent with policies, rules, practices, or traditions.

Which Approach is Best?

• It depends on:
  - your behavioral style
  - the leader’s behavioral style
  - the goal and context variables:
    - importance
    - trade-off’s
    - alternatives
### Leadership Behavior Styles: Assertiveness and Responsiveness

<table>
<thead>
<tr>
<th>Analyzers:</th>
<th>Low Responsive/ Low Assertive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Descriptors:</td>
<td>precise, systematic, well-organized, self-controlled, cautious, more formal, resistant to compromise</td>
</tr>
<tr>
<td>Strengths:</td>
<td>logical, thorough, serious, systematic, critical, precise, prudent</td>
</tr>
<tr>
<td>Weaknesses:</td>
<td>inflexible, exacting</td>
</tr>
</tbody>
</table>

### Directors: Low Responsive/ High Assertive

| Descriptors: | task-oriented, to-the-point, competitive, independent, confident, forceful, risk-takers, impatient, in charge |
| Strengths: | independent, candid, decisive, pragmatic, determined, efficient, objective |
| Weaknesses: | dominating, insensitive |
Socializers: High Responsive/High Assertive

Descriptors: Big picture, creative, charming, persuasive, decide quickly, outgoing, future oriented, optimistic, playful

Strengths: imaginative, friendly, enthusiastic, outgoing, excitable, persuasive, spontaneous

Weaknesses: undisciplined, unrealistic

Relaters: High Responsive/Low Assertive

Descriptors: Sympathetic to others’ needs, trusting, team player, seeks stability, slow to change, conflict-avoidant

Strengths: cooperative, loyal, supportive, diplomatic, patient, easy going, respectful

Weaknesses: permissive, conforming

Choosing Tactics

- What is likely to work with your boss’s style?
- What acknowledges the “It” domain?
- What is in your behavioral repertoire?
Table Work

1. Read the case
2. Discuss and answer assigned questions with others at your table.

Flexing Your Style

What does it mean?
- moving towards someone else’s style
- moving to the edge of your comfort zone
- remaining authentic

Tips for the Analyzer Boss
- Be on time, but not in a hurry
- It is better to be more formal and quiet in clothing, speech and manners
- Get to business quickly; be prepared, systematic, factual and exact
- List the pros and cons of proposals
- Show why a selected approach is best and point out relative risks
- Provide action plans and progress reports
- Follow up in writing
Tips for the Director Boss

- Be on time and organized
- Be energetic and fast-paced, speak clearly and directly and use direct eye contact
- Get to business quickly and use time efficiently
- Be specific, clear, concise; don’t over-explain
- Select key facts, present logically, focus on results
- Stay on the topic
- Ask for direction when appropriate

Tips for the Socializer Boss

- Be early to allow time for socializing, talk about experiences, opinions, and people
- Be energetic and fast paced, speak clearly and directly and use direct eye contact
- Socializers like a debate, but know your limits
- Support ideas with testimonials from respected/prominent people
- Keep a balance between flowing with the socializer and getting back on track
- Focus first on the big picture and then on details
- Make and follow plans, take care of details

Tips for the Relater Boss

- Be relaxed and moderately paced, comfortable in posture and quiet in speaking
- Invite conversation and be prepared to draw out opinions, without judging
- Encourage expressions of doubt or questions
- Facilitate decision making without pressure
- Mutually agree on goals, negotiate action plans with completion dates, be sure to follow through
- Assure that decisions have minimum risk
- Maintain ongoing contact and follow up
Mistakes/Pitfalls
• Misjudging “costs”
• Underestimating obstacles
• Ignoring competition
• Perceptions of vested interests, personal agendas
• Mismatching presentation style and task
• Overestimating the persuasiveness of your style
• Misreading the boss’s style

Followers who lead up
• Know that the leader depends on followers
• Provide diverse perspectives
• Provide valued specialized skills and knowledge
• Actively relate to values
• Provide models for others
• Understand the setting and those in it

THANK YOU