



Journey CxO

Managing Upwards: What it Means and How To Do It.

Cohort Group Meeting: April 2022



Managing Upwards

- **What does this phrase mean?**
 - **Mistaken belief:** Being political, kissing ass etc.
 - **Actually:** A value exchange and career development arrangement where you are working with your boss to create value for both parties.
- **Requires a lot of the same skills that make you successfully in other work roles (managing down) and in life (relationships with partners, friends, children etc.)**
 - Clear Communication: Especially understanding priorities
 - Curious Questioning
 - Listening
 - Empathy
 - Golden Rule: Treat Others As You Would Want To Be Treated
- **Be Proactive: Try to anticipate their needs (*caveat no one is a mind reader*) → if you get good at being proactive and anticipation → very pleased manager.**



Clear Communication

- **Schedule Regular 1:1 Meetings (weekly).**
 - Action: You own the agenda for each session. Create a template, update date it each week, attach it to the weekly 1:1 invite. Ideally remind your manager it is there.
- **Weekly Summary**
 - Action: Short e-mail each Friday afternoon that goes through what was accomplished this week.
- **Feedback: Seek it and Offer It (appropriately)**
 - Action: Request it more frequently than just in the 360 review or equivalent done (1x or 2x / year).
 - Action: Call out what they did particularly well and why it had a positive impact on you.
 - Action: If there is an opportunity for improvement...suggest ways things could work better next time..



Clear Communication

- **Early Warnings of Potential Problems.**
 - Action: Appropriately elevate challenges (after trying to solve them yourself with help of peers etc.)
 - Action: Renegotiate deadlines that may not be met sooner than later.
- **Semi-annually, do a career path review.**
 - Action: Request an offsite meeting to discuss the bigger picture parts of your professional goals.



Curious Questioning

- **Figure out how they define “success.”**
 - Action: Inquire as to how are they being judged by their boss, their goals / OKRs and targets.
- **Understand their overall style, especially communication preferences.**
 - Action: Ask what type of communications method they prefer?
- **Be interested in the bigger picture beyond your role. Your manager will notice this over time.**
 - Action: Ask for information about the business. Your manager will attend more meetings, know more of what is happening (particularly cross-functionally).
- **Ask questions with humility**
 - Action: Put in caveats and qualifier (if you have heard you might be too direct). Ask to learn.



Listening

- **Ask for Expectations**
 - Action: Understand if a project or request is “quick & dirty” or “detailed”. Find out who the audience will be for the output and in what format it will be delivered.
- **Ask for Background. Things, even those which seem pointless, typically exist for a reason.**
 - Action: When suggesting a ‘new idea’ to deal with an ‘inefficient process’ in your area, first ask why the current process exists (usually there is some reason, aka. [Chesterton’s Fence](#)).
- **Get to “Know” them. Beyond their work ‘persona.’**
 - Action: Find out about their passions, hobbies and commitments beyond work (i.e. family).



Empathy. View the world from their shoes.

- **Initiate positive engagement. People will generally reciprocate (and at least notice.)**
- **Celebrate their successes.**
 - Action: Call this out publicly, where appropriate.
- **Track their demeanor. Notice particularly when they seem extra stressed.**
 - Action: In stress situations, ask how you can be helpful (within the constraints of your time.)
 - Action: Use reflective language..., "I can imagine this would be....[xxxx]."
- **Consider what would make their life easier.**



Golden Rule

- **Model the behavior you want.**
 - Action: Treat your direct reports well. A good boss will periodically check in with your direct report (their skip levels).
 - Action: Be the 'superstar' you would like to have on your team.
- **Ensure Your Word Has Meaning.**
 - Action: Take time to scope a project before accepting it and the deadline.