



Managing Up: Helping You Help Your Supervisor

Overview: This session helps prepare volunteers and participants to take responsibility for the quality of their learning and experience by being active partners in working with their project managers, administrators or whoever supervises them in effective ways. 'Managing Up' is a term for describing how people can "manage" those people who manage them—by effectively asking for what they need and advocating what they want—in order to create a more dynamic environment that ultimately best serves the people in communities. This is a practice that helps people in organizations and systems work more effectively and efficiently. This workshop provides a fun overview of the concepts, and an opportunity to apply them in practice.

Category: People and project management; leadership skills; diversity

Level: Concept introduction can be suitable for all levels, but is especially helpful for project coordinators and those in middle- to higher-level positions

Type: Set of structured activities involving discussion and practice

Focus or Goals of this Guide:

- Participants will feel more responsible for relationships with the people who manage them
- Participants will have a sense of shared experience
- Participants will have specific tools and strategies for managing up and for allowing other people who they manage/coordinate to do the same

Materials:

- Paper and pens/pencils for all participants
- 4 types flip charts
- Flipchart prepped for plus/delta
- Markers
- 4 scenarios
- Handouts/examples
- Ground rules flipchart

How to Prepare:

Familiarize yourself with the content and create your own examples to share in the presentation, which connect with the infrastructure and organization of your campus and programs.

How to Do/Brief Outline:

The outline for a two-hour session (modify as needed) has the following components:

- | | |
|---------------------------------------|---------------------------|
| 1) Welcome and Introduction | suggested time 10 minutes |
| 2) Overview of Four Types | suggested time 25 minutes |
| 3) Self-Reflection on Managerial Type | suggested time 15 minutes |
| 4) Small Group Work and Scenarios | suggested time 20 minutes |
| 5) Drawing Connections | suggested time 10 minutes |
| 6) Tools and Strategy Sharing | suggested time 25 minutes |
| 7) Evaluation and Closing | suggested time 15 minutes |

1 Welcome and Introduction

Suggested time: 10 minutes

You will want to start by introducing yourself, the context for the session, and the intended outcomes. Then, you may also want to present some Ground Rules (below), so that people feel comfortable that this may be an opportunity for them to think about and talk about their working relationship with project managers/supervisors in a safe environment.

Present Ground Rules for the session:

- Respect and kindness
- Take responsibility for your own participation
- Anonymity
- Relationships 100% from each person

2 Overview of Four Types

Suggested time: 25 minutes

In this section, you want to present the four types of managers. Explain that this is a typology and that, as such, it is reductive – one person can be more than one type. Nonetheless, using such a framework helps people understand which type they, and those who they work with, are closest to. Note that the names here are intended to just paint a characterization of the type of style, and not to be gender-specific.

Type	Translation	Approach
Nice Nicki	People Person	Fairness and good will
Action Jackson	Go-to Person	Getting things done
Peter Practical	Analyzer and planner	Thoroughness
Betty Blue Sky	Idea generator	Big picture and vision

To demonstrate the type, you should act the same scenario out four different times, acting the way a different type would act each time. Try to just spend about five minutes on each managerial type. Examples of scenarios to act out include: a person on the phone in the office; writing; working on the computer; or developing a calendar, training plan, or a budget.

Suggested things to emphasize when acting out each type:

Type	Emphasis
Nice Nicki	Relationships, people's values, "Oh this person hasn't been utilized yet." "Oh, I've got to call so-and-so" "Oh, so-and-so is doing such a good job"
Action Jackson	Accomplishments and tasks "We need to get these 3 priorities covered," "So-and-so will get that done the quickest," "Let's x that and put this in instead"
Peter Practical	Logic, a thorough plan, "Each of the organizational values and competencies needs to have a session (or line item) associated with it," "For all of this to be accomplished, we will need to leverage additional resources totaling 40 person-hours," "This must be done before this."
Betty Blue Sky	Big picture, vision, and strategy "Look how this program thematically reinforces our organizational mission; each day needs to be centered on one distinct theme," "We should invite so-and-so to partner with us here as an entrée for working together in the future," "Oh, that's basically the same idea as that, but restated differently,"

Then, lead the group in briefly noting (on flip chart up front) the PROS and CONS of each type. Take only up to five pros and cons for each of the four types, moving quickly through this.

3 Self-Reflection on Managerial Type

Suggested time: 15 minutes

Ask participants to reflect on their own managerial type, as described in the four examples given in the previous segment. All participants should write for about 10 minutes about how they might fit in to each of the four managerial types. By the end of this time, they should have a good sense of where they most closely fit, while also recognizing what elements of other types apply to them. As a guiding question for this writing exercise, ask participants, “When you’re faced with a big project that requires you to organize a group of people, what strategies are most comfortable and most important for you to use?”

4 Small Group Work and Scenarios

Suggested time: 20 minutes

Determine whether time allows you to have each small group respond to all of the styles or have separate groups cover one or two styles and then report out to the larger group. This segment of the workshop should not last more than 20 minutes, so use your time wisely!

Present the following general overview of the scenario to the whole group.

General overview: *Everyone is working on the annual campus service day, and you are the point person. Beyond supporting your manager, you are concerned with the following issues that need approval/ support from your manager.*

1. call and confirm the kick off speaker (an old friend),
2. get banners from the sponsors,
3. pick up the supplies from the discount retailer in her truck,
4. return call to local TV station for an interview, and
5. follow up with the printers about when printed materials are coming
6. approval for your post service day time off for a family visit
7. gain support for a “Club Kids” area idea which was not in the original activity plans

Your campus program has two full time staff, three project coordinators, and five juniors and sophomores who have volunteered for leadership roles on the project. As point person, you have to mediate between these people and your project manager—who will exhibit one of the managerial types. The service day is two weeks away.

With this challenge in mind, how will you respond to the following scenarios relating to effectively “managing up,” given that your project manager is one of these four types? Think specifically about what “tools” (e.g., email messages, advance meeting agendas, memos for broad distribution, meetings, orientations/ training, etc.) will be most effective with each managerial type. Make sure you name these tools in your response.

Have a different workshop participant read each of the of the character types below.

Nice Nicki: For the service day, Nicki, has agreed to: call and confirm the kick off speaker (an old friend), get banners from the sponsors, pick up the supplies from the discount retailer in her truck, return call to local TV station for an interview, and follow up with the printers about when printed materials are coming. However, she hasn't come through yet. You're being held back and the clock is ticking. When you ask she says "Oh yeah, I'll get it right to you." You can tell she's stressed out about meeting your needs and is behind on her own work. She won't ask for help, and she's starting to exhibit signs of exhaustion.

Action Jackson: You just had a 15-minute meeting with Action (after he cancelled the previous two). You had prioritized your top three items from your now growing agenda and had high hopes of being able to get through these with Action. However, Action had another plan. He made a last minute request of you to write a press release on the service day that he could use at a campus advisory board meeting this afternoon. In the end you were left with: 1) an extra product that will take most of your time today 2) no feedback on your current work products 3) a vote of confidence and a slap on the back, "You're doing a great job. Keep it up! Can't wait to see the finished product." You still really need a solid hour to get feedback on your plans, get answers to questions, and approval to take action. He's always busy, and your schedules always seem to be at odds. Although he is good on e-mail, you just want some one-to-one time in person.

Betty Blue Sky: You just had a 15-minute meeting with Betty (after she cancelled the previous two). You had prioritized your top 3 items from your now growing agenda and had high hopes of being able to get through these with Betty, especially since she promised several days ago to help you on several pressing service day issues. However, she had a NEW IDEA! Last night she had a great meeting with the Mayor and now wants to change the theme the service day to reflect the new partnership with the city. You know this would mean changing the agenda to have the Mayor speak (in addition to the already confirmed speakers), changing the T-shirts, banners, press releases, and day-of-event program. It will also mean re-orienting all the volunteers to the new agenda and theme. Although her idea sounds interesting, you are three weeks into the current plan and two weeks away from the event.

However, you still need (or did before the new plan) Betty to: call and confirm the kick off speaker (an old friend), get banners from the sponsors, return call to local TV station for an interview, and follow up with national about when printed materials are coming. Not only are you waiting on these items, but you also need approval for your post service day time off for a family visit which you requested two weeks ago by submitting a form into Betty's box. Tomorrow is the last day to order tickets before a price hike.

Peter Practical: You meet with Peter every Monday from 11am-12pm. He requests that you submit an advance agenda on Friday with any attachments. Over the weekend at a service day you started talking with several volunteers about a great idea they had for a special community-building dance "Club Kids" area at the service day. It would have dancing and music (age appropriate) and children could earn entry by accumulating points at action stations. You are excited and the volunteers are willing to plan it. Peter dismisses the idea. You know there will be time to do it successfully. It will also be a great opportunity to give the student leaders a real sense of ownership over the day. Although this issue wasn't on your agenda for today, you decide to attempt to get Peter's approval, because next week would be too late to carry everything out. Peter was annoyed last week when the meeting ran over due to a relationship issue regarding a sponsor and the publicity budget. You really want to see this happen.

5 Drawing Connections

Suggested time: 10 minutes

Have the groups discuss how the scenarios are similar to, or different from, those they encounter when working with their manager. Ask: Which scenario would be closest to one in which they could see their manager? What are the advantages of their managerial type? What are the disadvantages? Which type do they think they are closest to? How have they seen this manifested in their relationships with others?

Give them the “Resource for ‘Managing Up’” sheet. Ask: How can they apply what they learned in the future – in terms of the way that they relate to their manager, and the way that they expect others to relate to them?

6 Tools and Strategy Sharing

Suggested time: 30 minutes

Each group should be encouraged to present its thinking. For example, each group could post its flip chart with the response to the scenario and tools they would use with the type of manager. Provide each group with roughly the same designated time for the brainstorming and report backs. Make sure they present both on the scenarios and how they see it applying to their own situation.

7 Evaluation and Closing

Suggested time: 15 minutes

Finally, you will want to wrap the workshop with some open discussion about what people learned and how they will apply this information to their own work.

Lead the workshop participants through a Plus/Delta session. A Plus/Delta session is a chance for participants to give positive feedback on and ways to improve the preceding activities and information. As the facilitator, you should divide a piece of flipchart paper vertically and list “Pluses” on the left and “Deltas” on the right. Ask participants to give their impressions of things that really resonated with them and excited them so far as the pluses, and things that they were unclear about or that they would have changed as the Deltas. These can happen simultaneously, rather than doing one first and then the other. Note both the Pluses and the Deltas for the rest of the workshop, as well as subsequent training events.

Also note any next steps or follow up (such as additional training).

A Look at Four Types of Manager Styles

Type	Translation	Approach
Nice Nicki	People Person	Fairness and good will
Action Jackson	Go-to Person	Getting things done
Peter Practical	Analyzer and planner	Thoroughness
Betty Blue Sky	Idea generator	Big picture and vision

Everyone is working on the annual campus service day, and you are the point person. Your campus program has two full time staff, 3 project coordinators, and five juniors and sophomores who have volunteered for leadership roles on the project. As point person, you have to mediate between these people and your project manager—who will exhibit one of the managerial types. The service day is two weeks away.

With this challenge in mind, how will you respond to the following scenarios relating to effectively “managing up,” given that your project manager is one of these four types? Think specifically about what “tools” (e.g., email messages, advance meeting agendas, memos for broad distribution, meetings, orientations/ training, etc.) will be most effective with each managerial type. Make sure you name these tools in your response.

Nice Nicki: For the service day, Nicki, has agreed to: call and confirm the kick off speaker (an old friend), get banners from the sponsors, pick up the supplies from the discount retailer in her truck, return call to local TV station for an interview, and follow up with the printers about when printed materials are coming. However, she hasn't come through yet. You're being held back and the clock is ticking. When you ask she says “Oh yeah, I'll get it right to you.” You can tell she's stressed out about meeting your needs and is behind on her own work. She won't ask for help, and she's starting to exhibit signs of exhaustion.

Action Jackson: You just had a 15-minute meeting with Action (after he cancelled the previous two). You had prioritized your top 3 items from your now growing agenda and had high hopes of being able to get through these with Action. However, Action had another plan. He made a last minute request of you to write a press release on the service day that he could use at a campus advisory board meeting this afternoon. In the end you were left with: 1) an extra product that will take most of your time today 2) no feedback on your current work products 3) a vote of confidence and a slap on the back, “You're doing a great job. Keep it up! Can't wait to see the finished product.” You still really need a solid hour to get feedback on your plans, get answers to questions, and approval to take action. He's always busy, and your schedules always seem to be at odds. Although he is good on e-mail, you just want some one-to-one time in person.

Betty Blue Sky: You just had a 15-minute meeting with Betty (after she cancelled the previous two). You had prioritized your top 3 items from your now growing agenda and had high hopes of being able to get through these with Betty, especially since she promised several days ago to help you on several pressing service day issues. However, she had a NEW IDEA! Last night

she had a great meeting with the Mayor and now wants to change the theme the service day to reflect the new partnership with the city. You know this would mean changing the agenda to have the Mayor speak (in addition to the already confirmed speakers), changing the T-shirts, banners, press releases, and day-of-event program. It will also mean re-orienting all the volunteers to the new agenda and theme. Although her idea sounds interesting, you are three weeks into the current plan and two weeks away from the event.

However, you still need (or did before the new plan) Betty to: call and confirm the kick off speaker (an old friend), get banners from the sponsors, return call to local TV station for an interview, and follow up with national about when printed materials are coming. Not only are you waiting on these items, but you also need approval for your post service day time off for a family visit which you requested two weeks ago by submitting a form into Betty's box. Tomorrow is the last day to order tickets before a price hike.

Peter Practical: You meet with Peter every Monday from 11-12am. He requests that you submit an advance agenda on Friday with any attachments. Over the weekend at a service day you started talking with several volunteers about a great idea they had for a special community-building dance "Club Kids" area at the service day. It would have dancing and music (age appropriate) and children could earn entry by accumulating points at action stations. You are excited and the volunteers are willing to plan it. Peter dismisses the idea. You know there will be time to do it successfully. It will also be a great opportunity to give the student leaders a real sense of ownership over the day. Although this issue wasn't on your agenda for today, you decide to attempt to get Peter's approval, because next week would be too late to carry everything out. Peter was annoyed last week when the meeting ran over due to a relationship issue regarding a sponsor and the publicity budget. You really want to see this happen.

Resource for “Managing Up”

Those who work with managers of these types should consider the following:

Nice Nicki

- Offer or assume with a specific task
- Make a joint planning calendar
- Articulate your tasks and needs
- Connect tasks to your needs
- Face-to-Face meetings/personal contact
- Prioritize tasks
- Constant Review/Check-off/Affirmation
- Debrief and assess her situation and sympathize
- Review commitments and reassess
- What is feasible?
- What can I do to help?
- What can I take over entirely?
- Set Clear, Specific expectations, especially for the time that specific tasks are to be completed
- Check in and follow up on the plan
- More stroking up

Action Jackson

- Find a common time for a meeting with Action. Catch him early in the day before things have piled up and your time gets bumped.
- Think about using email for short items that don't need face-to-face time
- Always use an agenda, get it to him ahead of time and plan for short to the point meetings. Let your agenda give a lot of information- write your questions, lay out options, list pros/cons. Action will come more prepared and able to move through the items in a shorter time.
- Get him out of the office for important meetings and discussions where he can't be distracted by others, the phone, email etc. Go get coffee, run an errand together and talk on the way
- If Action likes email it can be a great tool for communication, flag issues, pose questions, lay out intended plans in text, and then follow up in person
- Find another person to use as your sounding board. Action won't be very available for LONG sessions
- Present Action with the main, crucial points and what you need to get it done.
- Don't take missed meetings, short answers etc. personally.
- Give written feedback.
- If you have Action's confidence, often he would be happy to have you move forward without lengthy discussion. Give him updates, project your path and indicate the direction you are going unless you hear otherwise from him.

Betty Blue Sky

- Try to get a good assessment of the urgency or importance of an idea. Is it something to think about, or a good idea for the next time? If so don't stress about it. Play with the idea and develop it a little more.
- If the idea is more urgent and Betty wants something done about it now - figure out what the main point is and you may be able to work that central idea into the current plan, or see if there are aspects of the idea that can be easily and logically incorporated. If the idea is BIG and NOW but is a hard fit for the current plan, see some of the steps below.
- Set up time for follow up to bring ideas, questions, and reality check
- When faced with a new idea that contradicts the last one, restate the original plan and WHY it was selected.
- The idea that interests Betty could often be implemented any number of ways. Find out if there's a plan with the idea.
- Get her to commit to dates and times and to write them down.
- However, don't rely solely on paperwork and notes — Betty usually prefers human interaction.
- Work on a compromise. Don't nag; provide concrete benchmarks that YOU will do to motivate them to get it done.
- Don't burst her bubble; resist rejecting ideas quickly. Validate ideas, let them simmer, and play with them.
- Sometimes just say "no;" however, doing so immediately is not the best strategy.
- Stress commitments that were made in the past and work already completed
- Rarticulate work load; sometimes Betty has no conception of time constraints.
- Cover important and/small items at the beginning of meetings instead of the end.
- Take care of your own needs too; don't run yourself ragged trying to implement every new idea. Taking on more work and abandoning what you've already done or are currently doing is not always appropriate

Peter Practical

- Voice mail over the weekend to amend agenda
- Short memo on desk by 9am (bullet idea and build your case)
- Have details planned out
- Be prepared for his concerns and questions
- Bounce off trusted co-worker
- Give notice with e-mails
- Come prepared with policies and details
- Present organized presentation
- Project confidence and personal commitment
- Model "non-Peter" behavior (it's okay to have opportunities for "ooh, ooh I forgot" on agendas)