PERSUADING AND INFLUENCING

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Persuading and Influencing

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LESSON 1:
THE ART OF
PERSUASION
Being persuasive is a valuable asset. You may have heard the phrase "People buy people". You might think it sounds like a cliché, but it is also very accurate. After all, if people like and trust you, they will listen to you, follow your advice, and accept your explanations.

You can enhance your persuasive skills by understanding and harnessing your own personal power and skill set. Remember, for example, you have accumulated a great amount of knowledge of your role and sector. You hold opinions gained through your experience. Do not put yourself down by forgetting this!

When trying to persuade people, remember that, basically, there are three human behaviors: aggressive, passive, and assertive. Let's consider each one in turn.

Aggressive people aim to satisfy their own needs, never those of others. Passive people, on the other hand, meet other people's needs, but rarely their own. And finally, assertive people feel good about themselves and help others to feel good too.

We can dig into these a bit more by thinking about examples of these behaviors in action. Let's look at passive people first. Passive people are usually afraid to speak up and, instead, agree with others, despite their own feelings. They often speak softly, slouch, and withdraw. They might even isolate themselves from groups.

What about aggressive people? They tend to interrupt and 'talk over' others, speaking loudly. They usually stand rigidly, crossing their arms and invading others' personal space. They often try to control groups. Also, they consider their own feelings ahead of other people's feelings.

Finally, let's look at assertive people. They usually speak openly and use a conversational tone. They tend to relax and adopt an open posture and expressions. They like to participate in groups and keep to the point. They are good at seeing the other person's point of view.

Generally, we prefer to deal withassertive people. The assertive personality is the best one for persuasion. By practicing assertiveness skills, you can learn how to discuss, argue, and negotiate. You will then find that your persuasion skills are vastly improved too!

So, how can you actually be persuasive in your day-to-day interactions? First, be assertive from the outset. Clearly define and state your needs or expectations, by using 'I' statements instead of 'you' statements. When you have to, say 'no' respectfully and always give a reason for doing so.

Next, consider the actual language you use. For example, you could say “This might be a good way of proceeding, let me explain why” instead of “You should do this.” Don't forget non-verbal language too. Ensure your facial expressions and body language match your message. Otherwise, people will question your honesty!

Speaking of honesty, be honest about potential barriers to you persuading someone. Your recipients may have differences in perception or just poor listening skills. They may have a tendency to jump to conclusions or use stereotypes. Also consider their level of knowledge, possible lack of interest, lack of confidence, or difficulties with self-expression.

Make sure you take into account the whole situation. Are emotions running high? Are powerful personalities clashing? Perhaps there are time constraints, or language and cultural differences.
If you want to succeed at effective persuasion, keep all parties well-informed and be truthful, even when the news is bad.

A simple persuasion tool in getting faster buy-in is not to ask people what it is that they should be doing. Asking this can lead to varying answers at varying levels of understanding, and also possible confusion.

It is better to pose your own specific questions, so as to gain your own specific answers. Ideally, propose a selection of ideas yourself and then have people or stakeholders choose from your selection.

Let’s consider some examples. Suppose you notice another person and compliment them on their clothing, ability, skill, or something else. You are making the effort and it is usually well received. That’s all good!

But have you considered how you should react when you receive a compliment? Actually, most people get this wrong. When complimented, most recipients tend to refute the compliment. For example, someone might say to you, “I love your coat! It is a lovely color and it really suits you.” And you might reply, “Oh, this old thing? I found it at the back of the wardrobe. And it’s not really that nice of a color.”

Now, what’s gone wrong here? When someone offers you a compliment, they are sharing a personal belief with you. They are telling you what they think. And if you brush off the compliment, you ruin the sentiment, by telling them that they are wrong. This response can cause a communications disconnect. It makes the exchange uncomfortable, and could even be seen as being rude. It is far better to say a simple ‘thank you’ and accept the compliment.

Consider Oscar recipients. They never say, “Thank you, but you shouldn’t have.” Instead they say, “Thank you for believing in me and my work with this award.” This assertive response persuades the 7,000 members of The Academy of Motion Picture Arts and Sciences to feel happy that they made the correct decision!

**Persuading an Audience**

Suppose you are putting a proposal of some kind to an audience. It could be a sales pitch to customers or a project-briefing to peers. How can you persuade the audience to accept your proposal? Here are some effective techniques!

First, grab their attention from the off! You might think it’s good to begin by introducing your pitch or proposal with your own name, title, and that of your company. And this is all perfectly proper and polite, of course. But it’s not effective at persuading an audience to listen to you! Grab the attention of your audience from the outset. Open with a surprising statistic or a thought-provoking anecdote, for example.

Equally important is the closing out of your pitch or proposal. Remember, the last thing you do or say is the first thing they will remember. So make it memorable! Link your closing ‘grab’ back to your opening ‘grab’. You could do this by reminding the audience of the same sentence, or near enough, that you used at the beginning and close out with it. In this way, you link the start and finish neatly for your audience. Or you could close by reiterating the significance of your opening statistic or anecdote.
A second useful technique is to remember that if people think you are trustworthy, you can be assertive and persuasive with them. And, conversely, if you are assertive and persuasive, you can become trustworthy.

So how do you achieve this? You can begin by actively listening to the audience members when they speak to you. View them with interest and curiosity. This will substantially increase the impact of your shared communications.

Active listening is a four-step process. First, you must truly listen to the person speaking. You need to be physically seen to listen. You can do this using eye contact, for example, or keeping your face and torso in alignment, nodding your head, and using the occasional non-verbal ‘uh-huh’.

Second, feed back the content, feeling, and your understanding of the person’s words. This helps confirm to them that you have received and understood their message.

And speaking of confirming things, the third step is to confirm you heard the person correctly. And the fourth, and final, step is to ask a relevant follow-up question to further clarify your understanding of their situation.

Another effective technique is using pauses. Of course, you can use a logical or emotional approach, depending on your audience. But the action that will have the maximum impact is having the courage to pause.

Pause to give yourself the appearance of thinking about the answer to a question. Even if you already know the answer, pause for a few seconds to give your answer more weight. Also, you can pause after making an important point, and make eye contact with your audience while doing so.

How long should a pause be? Well, no shorter than two seconds and no longer than ten seconds, that’s a good rule of thumb.

The fourth technique is to remember to be sincere and honest in all your communications. Bear in mind that the audience will almost certainly be aware of any deceit on your part, especially if they begin a question and answer session with you.

But how will they know you’re being insincere? How does this work in practice? There’s a very simple ‘tell’ that gives you away. Did you know that adult humans tend to glance to their right when creating a feeling or reassembling facts or thinking about something about which they are unsure? So, if you are unsure, you will do this involuntarily, and the more tuned-in members of your audience will be aware that there is something untoward or untruthful in your question responses! This, in turn, will obviously make you less persuasive.

**Maximizing the Impact of a Proposal**

How can you increase the impact of your proposals and pitches, and make it easier to win your audience over to your way of thinking? There are three very effective techniques: triplication; copying VAK words and phrases; and looking out for potential disconnects.

Let’s focus on triplication first. You can think of triplication as a way of linking the three corresponding parts of any pitch or proposal. These three parts are, of course, the beginning, middle, and end.

So let’s first assume that every story has a beginning, a middle, and an end. And let’s assume that the audience needs to know at all times whereabouts you are in the triplication of learning. Which one of
the three parts are they in? It is up to you to guide them clearly and effectively at all times during your
pitch or proposal.

You can help your audience remember what you say by using repetition. In other words, tell them, tell them what you told them, and then tell them again.

The second technique is copying VAK words and phrases. Now, I know that your first question is going to be, what does VAK mean? It stands for visual, auditory, or kinesthetic, and it refers to the words and phrases that people use. Noticing these words and phrases, you can learn to notice how someone is thinking.

Let’s look at visual phrases first. Think of these as ‘see’ sensory phrases. Examples of these phrases are ‘appears to me’; ‘beyond a shadow of a doubt’; ‘clear cut’; ‘paint a picture’; and ‘see to it’. Notice how all these phrases involve the use of sight?

Next, auditory. These are ‘hear’ sensory phrases. Examples of these include ‘manner of speaking’; ‘clear as a bell’; ‘call on’; ‘describe in detail’; and ‘to tell the truth’. In this case, all the phrases revolve around how something sounds.

And finally, kinesthetic. There are ‘feel’ sensory phrases. Examples of these include ‘boils down to’; ‘come to grips with’; ‘firm foundations’; ‘lay cards on the table’; and ‘pull some strings’. In this case, notice how the dominant sense is touch.

So how does all this help you to persuade someone? Well, if you pay close attention to someone using VAK words or phrases, then you can copy their sensory phrases in your own speech. This will really ramp up the rapport between you. Note that you are not making them like you or agree with you. You are simply increasing the rapport between you. This should help to intensify your message, get your point across, and persuade them.

The third effective technique is to look out for potential disconnects. It is not enough to simply listen to your audience. You also need to pay attention to the signals you are receiving from their body language. You could pay attention to the amount of eye contact you are (or are not) receiving, and the positions of your audience at rest. However, what you really need to be focusing your powers of observation on are potential disconnects.

A disconnect may occur when you are attempting to persuade an audience. It can take a number of forms. It can occur whenever there is resistance, disagreement, or even conflict about what you are saying. These reactions manifest themselves in a disconnect between you and your audience.

Consider what a disconnect might look like in practice. Suppose you are making a pitch to an audience. Up to now in your pitch, you believe that this audience has been fairly receptive to what it is you are attempting to persuade them to accept, buy, or consider. Everything seems to be going great!

At this stage, your audience is in something like a mini-trance, because they are comfortable and relaxed. However, outside of their immediate conscious attention, all of their senses are on a kind of hyper-alert. This is known as the ‘Unconscious Radar Scan Effect.’

Their senses are scanning their surroundings, testing for safety, and ready for a perceived threat. If you deliver words of disconnect to your audience, your words will trigger in them the part of their brains called the amygdala. It instantly responds to a perceived threat with the instinctive ‘fight or
flight’ response. This could result in a physical flinch or jump. It is this sudden physical movement that you should train yourself to take notice off.

If you are lucky, the physical reaction will be obvious. The person in the audience - or the entire audience - might throw up their arms and audibly blow air out of their cheeks. They might even stamp their feet loudly. But, let’s face it, such an obvious reaction is highly unlikely!

Any physical reaction you notice will probably be much less obvious. For example, a slight movement in a chair as people sit more upright, or make themselves more comfortable, or push their chairs away from the table, are subtle reactions to look out for. Other signs include putting down a pen or, if standing, taking a small step backwards. You might simply notice someone raising an eyebrow. Or you might even hear a non-verbal sound, such as tutting, or a grunt.

The list is actually endless. The kind of reactions you will encounter all depend on the ingrained responses that are hard-wired into each person. You need to get tuned-in to different responses and to be aware of the mere suggestion of a physical movement among your audience.

And if you do spot a disconnect? Well, this is a chance to really impress your audience with your powers of perception! So halt your pitch and go back to the point of disconnect. Then ask your audience some clarifying questions and do your best to reassure them. This should help you to come across as both credible and persuasive.

**Overcoming Objections**

When pitching a proposal, you may encounter two types of objections. The first type are excuses not to go ahead. And the second type are real objections or areas of mismatch. In fact, mismatch is often a better description because the objection may simply be a misunderstanding, or a request for more information.

Both types of objection can be met and addressed by a technique called ‘pre-handling’, or handling the objection before it is even raised. Early in the pitch, you should pre-handle any objections you are likely to meet later on. Think of it as a pre-emptive strike. Suppose you pre-handle an excuse. The audience cannot then use that excuse at the end of your pitch. If it is a real objection, and you discover it early on, you know where you stand and what problem you have to solve.

A word of caution. Only pre-handle the obvious issues. Otherwise you are making things unnecessarily more difficult.

Here are some examples of pre-handling. When discussing a delivery date for a project, you could ask, “When do you want it delivered?” This pre-handles the excuse, “I won’t need it for a few months yet, so let’s put it on hold.”

Suppose you are discussing a new product spec. You might say, “What exactly are you looking for?” This pre-handles the objection: “It’s not quite what I’m looking for.”

You might be worried about how the board of directors will react. So you could say, “Will you be making this decision alone?” This neatly pre-handles the objection, “I must put it before the board.”

Perhaps the most difficult objections relate to price. Remember, people buy what they value. So, try to pre-handle objections about price by building up the audience’s judgment of value. The higher you can build their opinion of the value and importance of their requirements early in the proposal, the
easier it is for them to accept your cost, timeline, and so on later on. Perhaps the biggest mistake people make is trying to match price instead of selling superiority.

Handling and overcoming objections can be difficult. But remember that knowledge is power. Only if you have the necessary knowledge can you take and make decisions, and overcome objections.

Add value if you can – but do not give anything away that may cost you. Give away a service over a product if that is cost effective, or vice-versa.

Also, try to find common ground. Consider this example. I was coaching a senior manager in one of the ‘big four’ professional services companies in Canary Wharf, in London. A potential client had been consulting all four of these companies seeking assistance to implement a new piece of robotic software. Three of those he approached told him it was an easy implementation, and that there would be a low-cost and a short timeframe.

However, the professional services company I was working for had told him it would be a difficult implementation due to technical issues that were solvable, but were going to be expensive and take twice the time – estimates that the other three companies predicted.

I was meeting my coaching client in the reception of her building when we bumped into the potential client as we walked onto the street. The potential client went straight away into the promises of low cost, no technical issues arising, and short timeframes that the other companies had been promising. My coaching client responded with the three elements of her original pitch: tech issues, costs, and timeframe.

She then paused and said, “My team and I will be with you every step of the way, even if we have to be in your building until 2:00 am!” The response she received was somewhat bemused, as the potential client was delighted at her assertive approach and her honest assessment of his situation.

And then she sealed the deal by saying, “And if it is 2:00 am, then we will buy the pizza!”

So I watched them both shake hands on a highly lucrative deal, because of finding common ground through the promise to buy a late-night pizza.
LESSON 2: MOTIVATING YOUR TEAM
As a team leader, your goal is to develop the competencies of each individual on your team, so that they are self-motivated and don’t need to rely on others for direction and guidance. There are different ways to encourage self-motivation including:

- Setting high expectations
- Tapping into the inner work life of a team, and
- Using small wins to acknowledge progress

Setting high expectations for your team will trigger better performances from them. Similarly, if you set low expectations, this can lead to lower performance from your team. When you set high expectations, your team will be motivated to ensure more efficient work practices and to refine their skills in order to improve their individual performance and meet your expectations. This can lead to an improvement in job satisfaction with happier team members and an improvement in work-life balance.

There are many different theories around motivation, each one of them striving to promote techniques that ignite long-term, sustainable motivation. However, all of these theories will fail without one vital ingredient – the ability to inspire people to access the ‘inner work life’ that produces self-motivation.

Inner work life can be defined as the various and changing perceptions and emotions that individuals experience throughout the working day as they react to, and make sense of, interactions and events that unfold around them. For example, your perception of a colleague could be negative, that they are irritable; or you could feel elation after winning a new contract, and so on. Your inner work life directly affects, and feeds into, your own level of self-motivation.

According to The Progress Principle by Teresa Amabile and Steve Kramer, progress is the strongest motivational factor. It suggests that of all the positive events that influence your inner work life, the single most powerful event is making progress in meaningful work. Equally, of all the possible negative events, the single most powerful event is the opposite of progress: experiencing setbacks in your work.

As a team leader, you can use the Progress Principle to motivate your team. Even when progress occurs in small steps, a sense of steady forward momentum towards an important goal can make all the difference on a daily basis. Small wins by your team have a strong positive effect, whereas small losses can produce a strong negative effect.

Research shows that a highly motivated team is more likely to be creative. What this means in practice for you as team leader is that when your team records a success, they may be more motivated and open to new, challenging work that demands creativity and high performance. In addition, following days of notable progress, the team may be more self-motivated than usual to take on difficult problems and find creative solutions.

However, the formation of any team will bring its own motivational issues. The development pressures on employees follow a natural course, as identified by Bruce Tuckman’s research in the field of group development. His research compiled the results of 50 studies on group development and identified four stages of development for any team: Forming, Storming, Norming, and Performing.
Tuckman found that when individuals are new to a team or task, they are motivated but usually relatively uninformed of the issues and objectives of the team. This is where the manager comes into play – they must tap into the inner work life and motivations of the individual employees, throughout each of the four stages Tuckman identified:

- **To begin, Forming is when group members meet about a common goal and motivation is high, but uninformed. The group needs to work out relationships and counter dependencies and team leaders should be directive.**
- **Secondly, Storming is when group members learn how to work together, and motivation is challenged. Group members learn about the abilities and capabilities of other members.**
- **Thirdly, Norming is when group members start to work and act as a team, and high motivation is now the norm. Members’ roles are focused on helping the team succeed.**
- **In the final Performing stage, balance is achieved by the team working towards common goals. All members of the team are accessing their inner work motivation. Members are flexible, agile, and focused.**

As the team moves through these four stages of development, performance, self-motivation, and productivity increase.

A good example of self-motivation and inner work drive is a research project undertaken to determine motivation factors in the American workforce following the Second World War. As part of the project, a team was formed in an air-conditioning-unit manufacturing company. The recruited team were only informed about two elements of their new assignment - they were to join a special team in a unique experiment into human performance, and they would be assembling domestic air-conditioning units.

The entire team then completed a week of training for a hand-assembly production line. Over the following months, the production line and the entire assembly team moved location numerous times - often at short notice and during unsociable hours.

However, throughout the course of these physically arduous production-line relocations, the hand assembly production output did not decrease; in fact, there was a marked increase in production of the air-conditioning units. The final relocation of the assembly production line found the team at high altitude on a snow-covered mountain, working in a tent with no heating, on a stormy night. Even under these extreme conditions, the production output took a marked jump upwards.

Why did this happen? Where did their self-motivation come from to access their inner work drive?

When debriefed, each member of the team recalled their original team briefing on day one, when they were informed that they were a special team with a special task. This motivated them to excel in whatever was thrown at them to prove that they were worthy members of this special team!

**Intrinsic and Extrinsic Motivation**

While leaders focus on motivating their teams, they are often unaware that a big demotivating factor can sometimes be their own actions. Negative behaviors to avoid include: being close-minded, resisting new ideas because they were not your own, micromanaging your team, and resisting change.

Employees join a team with a sense of motivation and hope, but a demotivating leader can erode these feelings over time and cause the departure of good employees. Company culture can also
contribute to employees becoming demotivated. Factors such as resistance to change, poorly designed or restrictive internal systems, and ongoing conflict are morale-draining. Addressing these sorts of negative issues in your company culture can have a significant and positive impact on your employees’ motivation.

The basic motivating factors for most employees include achievement, advancement, autonomy, personal growth, recognition, responsibility, and the work itself. However, being able to access your inner drive is also important as it leads to intrinsic motivation.

When you access your inner drive, you are in a powerful position to be able to motivate yourself towards or away from something. Motivating yourself towards a goal is powerful - for example, “I want to be rich, I want a promotion.”

However, the more powerful of the two is to motivate yourself ‘away’ from something – for example, “I don’t want to lose my job, I need to be more productive.” A team member who motivates themselves away from something is never certain when to actually stop, like the billionaire who keeps making millions because they are afraid of returning to their poor childhood.

You can use intrinsic motivation to best effect if you can get someone to truly believe in an idea or show them how their values align with what you wish to achieve. Seek to make those you wish to motivate feel good about what you’re motivating them to do.

Intrinsic motivation is when you are motivated by internal factors. It drives you to do things just for enjoyment, or because you believe it is a good or right thing to do.

Extrinsic motivation, on the other hand, is when you are motivated by external factors. It drives you to do things for tangible rewards or pressures. You can offer positive motivations, such as commissions, or you can use negative motivations, such as threats, to achieve motivation. Either way, extrinsic motivation is crude, easy, and often effective. However, it focuses team members on the reward rather than the action so if you stop giving the reward, they’re likely to stop the motivated behavior. Try to minimize the extrinsic motivation. For example, pay employees fairly, but then do everything to keep money out of the equation of why they come to work.

There is a paradox of intrinsic and extrinsic motivation. Intrinsic motivation is a far stronger motivator than extrinsic motivation, yet extrinsic motivation can easily act to displace intrinsic motivation.

**Techniques to Motivate Employees**

So why is it important to motivate employees? Motivating your team:

- Reduces the risk of losing valued employees
- Reduces costs of sickness absence and loss of productivity
- Reduces disruption due to interpersonal conflict or value clashes
- Increases co-operation and collaborative working, and
- Builds energy, creativity, and engagement due to raised mutual understanding, respect, and mental wellbeing

Research has shown that where team members’ natural energy and healthy psychological functioning is reduced, so is company performance. It also shows that when workers feel acknowledged and respected, they are more highly committed, more creative, and are motivated through their inner work to go that extra mile to optimize performance and results.
There are numerous techniques you can use to motivate employees such as recognizing great work, celebrating results, providing rewards, and so on. However, while these methods are popular and high-impact in the short to medium term, they tend to be low-impact in the long-term and less likely to lead to genuine buy-in. Two effective techniques for motivating employees are:

- Setting goals that employees have an interest in, and
- Delegating important tasks

Extrinsic motivation techniques address only the first stage of natural motivation, in that, they give the team goals. However, team members will learn to recognize the task the manager wishes them to work on as a way to win a prize, rather than an actual process worth completing or learning from. So, once the reward has been earned, team members no longer have the motivation to retain the skills or processes they have learned along the way. Their questions about the task are more likely to be; "What's the least amount of effort I can put in to satisfy my manager and gain my reward?"

A better way to motivate team members is to give them the opportunity to achieve goals that satisfies two conditions: one – that team members have a real interest in this goal, and two – that low-motivating tasks or skills are intrinsically related to the goal.

This makes the task seem less trivial and allows team members to properly index the skills and learning necessary to achieve the goal. They then learn skills in a context in which they can later use.

Delegation, while not commonly recognized as a motivation technique, is highly effective. Put simply, you delegate to motivate. If I were to approach you and state that there was a very important task that I wanted you to complete, that there was no one else with your skillset who could do it, and that most importantly I trust you to complete this task for me, then delegation becomes an extremely powerful motivator tool. The person who has been tasked with carrying out the instruction now strives to the best of their ability to achieve the desired result, to be rewarded with your thanks.

You can take this one step further if you set the task to be delegated just slightly above the person’s ability level. Then they will strive to succeed and gain the resulting respect that comes from completing the task.

Whatever motivation technique you choose, it is important to remember that as a manager, you can only achieve your team goals through the actions of your team who need their own clear motivation to achieve results.

Throughout all stages of the motivation process, managers should:

- Gain trust through active listening and empathy.
- Set high expectations to inspire the team.
- Establish a clear strategy and plan, and communicate them often.
- Practice MBWA (or Management By Walking Around) to question, listen, and ascertain if your communications about the task are being understood.
- Develop clear and measurable indicators of success and acknowledge such success.
- Use ‘why’, ‘how’ and ‘when’ questions with employees. For example, questions such as: ‘Where are we?’, ‘What do I need to know?’ and ‘How can I help you?’

And finally, ensure that every individual has clear responsibilities and performance expectations. If a manager does not set explicit expectations, then the members of the team will not be aware of what is expected of them. Assigned tasks will fail if the initial set of instructions have not been clearly defined at the outset.
Indicators of Employee Motivation

According to the organizational change author, Ray Anthony, there is a strong link between high morale and a motivated group of employees.

He lists six major indicators that show employees are genuinely motivated to strive toward peak performance and contribute to the success of their teams:

- They are conscientious and take the initiative.
- If your employees want to accomplish something, they will take charge and act on their own before being told to move ahead. The best teams in your organization consist of a group of leaders, not just a group with a leader.
- They challenge management to make the organization better.
- Motivated employees care about and show great pride in working in an organization that constantly gets better and wants to be the best in its sector.
- They support and help each other.
- A highly-motivated environment builds teams of employees who take care of and otherwise support each other. Openness, honesty, and best intentions reign in these relationships.

There is minimal absenteeism, conflict, or avoiding of responsibility.

- You know employees are excited and thrilled when they experience a deep and abiding sense of purpose, meaning, satisfaction, and achievement in what they do.
- The organization is a learning organization, seeking feedback for self-improvement.
- The goal is to get better and better all the time, raising the bar of what was deemed best then, to what is best now and in the future.
- They volunteer for tough, challenging assignments.

After successfully finishing a difficult, but an enriching project, these employees feel a sense of deep accomplishment, and tapping into their inner work is their norm. This further fuels their motivation to continue to volunteer for challenging projects.

When employees are motivated, they are regularly accessing their inner work and have an enthusiasm that drives the on-going success of their team and their company as a whole.

As a manager, how can you ensure that these indicators are visible in the workplace? Well, you can:

- Ensure high expectations are set for all employees and for the team.
- Ensure that every employee has adequate resources to support their work performance.
- Display empathy by understanding what is most important for each person’s employee experience in the organization.
- Build-in clear, timely, constructive feedback.
- Hold team members accountable for their successes.
- And finally, recognize failure as being an intrinsic part of employee motivation that also has learning value. You should use mistakes for their learning value and internalize the maxim: ‘If I am not making mistakes, I am not trying hard enough.’
LESSON 3: MANAGING UPWARDS
Activities Involved in Managing Upwards

Let’s begin by considering what the aim of managing upwards is. Essentially, it’s about building the best possible relationship with your manager, with the intention of making both your work lives easier.

At its core, managing upwards involves three key activities: managing yourself effectively, thinking of your manager as your customer, and being trustworthy, honest, and reliable at all times.

Generally, what your manager most needs from you is that you do your job well and meet your objectives. By meeting your objectives, you help your manager meet his or hers and this, in turn, makes your manager look good. To meet or even exceed expectations then, means learning to manage yourself so that you can deliver the goods.

Being able to manage your workload is vital. So you need to agree with your manager what you can do. Knowing how to prioritize tasks is a valuable skill. It’s natural for any leader to want to do a good job and be seen as a valued team member or a competent leader. However, don’t fall into the trap of taking on too much. Companies are always under pressure to do more with limited resources. The temptation to say yes to everything and instantly regret it is common. The danger is that you will miss deadlines and not deliver what is expected of you. By trying to do too much, you end up not doing enough. And this can negatively affect your reputation and your standing in your boss’s eyes!

A second activity is thinking of your manager as your customer. An unusual but effective way to build your working relationship is to think of your manager as a customer of your service, rather than as a commander. If you imagine yourself as being a trader who sells your skills and productivity to the company, then your manager is your prime client. Keeping your manager, the company’s representative, happy with your service is your way to meet your service contract.

You will notice that your feelings about what you are tasked to do are different, from this point of view, than those of an employee being given orders. Managing your client to clarify requirements and agree deliverables is a much more agreeable and evenly balanced relationship than that of boss and subordinate.

And the third activity is being trustworthy, honest, and reliable. Can your manager trust you? The issue of trust goes beyond just being trusted to get the job done. Being honest and trustworthy means showing confidence in your colleagues. You need to be seen as someone to be relied upon – someone who will “have their back” and support your colleagues when challenges arise.

Think of yourself as an ally to your manager, ready to cooperate and fill in when things need doing. It is common in any working environment for issues or tasks to appear that are not formally part of anyone’s job. Being willing to share in such tasks, or to fill in when colleagues are incapacitated or overloaded, makes your manager’s job easier. You show that, in a spirit of cooperation, you are prepared to take up the slack.

Consider this example. A marketing company produces print leaflets and brochures for many clients. The company is very successful, and, as a result, there are often large queues at its office. One day, Paul, the managing director, casually remarked to Sarah, the office manager, that he was becoming concerned at how long customers were having to wait when they came to collect printing jobs.

Sarah realized that she had become so overworked worrying about the tiny details of running the office team effectively that she’d lost sight of whether the team was actually delivering value to its
customers. As a result, she started to delegate some tasks to her more experienced team members. This enabled her to turn her attention to operational matters.

She thought about what Paul said. She realized that as well as satisfying her customers, she had to satisfy her manager. After all, he was her customer too. And he was disappointed because the office was not being run efficiently.

Sarah worked with her team to come up with ideas for ensuring quicker turnaround times for customers. She also consulted some of the customers, doing a small, informal survey among them. She assured the team that her aim was to make the processes more efficient for everyone, the team members and the customers.

Over time, Paul noticed that the queues were moving faster. He complimented Sarah on her efficiency. She explained to him the steps she’d taken to implement his feedback. He was surprised that she’d gone to so much trouble over what he considered to be just a casual remark. Sarah replied that she considered her boss as if he were a customer wishing for better service. So she decided to take steps to work out how she might deliver that. Paul was very impressed by her initiative.

**Challenges to Managing Upwards**

Managing upwards sounds like a great idea. But let’s be honest. It’s not always easy! What challenges might you face when you try to manage upwards? The three main obstacles you might encounter are your manager’s communication style, your ability to understand what your manager wants, and your ability to receive feedback.

Let’s consider your manager’s communication style first. There are many different ways of experiencing the world around us and communicating with ourselves and others. Some of these ways include talking things through with others, and thinking internally in pictures, or reading or putting ideas in writing, and thinking internally by mulling things over. Some prefer physical movement or touch, and thinking internally by engaging in self-talk. And some people prefer listening and hearing specifically what is said, and thinking internally in feelings or sensations. These are all different communication styles. No one style is better than any others. The key point is that you need to be able to work out another person’s preferred communication style.

These largely unconscious differences in style or preference are behind many of the so-called “personality” difficulties between colleagues. Consider which of those styles may be most like you. Does your manager operate in the same way or differently? If there is a noticeable difference, it could be impeding your ability to manage upwards. If that’s the case, it is only necessary for you to adjust your communications to suit your manager’s preferred way of receiving information or suggestions. It is not necessary to change your own style. So for example, if you find it easiest to talk things through and discuss possibilities, whereas your boss just wants to get to the point, doesn’t appear to listen very well to options and is quick to decide, make sure you think things through first. Present your manager with specific suggestions with your back-up reasoning. If you put them down on paper and present them with a note that can be picked up and handled, it matches the need for something tactile as input, and your manager will be able to tell her or himself what to decide.

Noticing your manager’s preferred way of receiving information, and offering your information in that way, is a powerful and effective way to make your boss’s life easier and to build trust.
Consider this example. Sam leads the social media team and is becoming concerned that their latest Facebook strategy isn't getting traction. He wants to run some ideas by his manager, Olivia. Sam likes to talk things through and brainstorm ideas. However, he's learned that Olivia prefers to be given a document or presentation that she can go through in her own time. So he sends her an email outlining the problems with the current campaign, and what steps the team needs to take to address these.

When managing upwards, it's important to be able to understand what your manager wants. Now, maybe you're already lucky enough to have a manager who explains tasks and instructions really clearly. For most leaders, however, a certain amount of mind reading and guesswork has to come in to play. This is nobody's fault. With the everyday pressures of work, you might think you have understood and end up making assumptions about what your boss meant. Or maybe your boss just gave you instructions that really were not detailed enough. You end up relying on guesswork. Or you might lack the courage or opportunity to follow up and get the information that is missing. Either way, poor results are the likely outcome.

To understand what your manager wants, you need to be able to receive instructions in the correct manner. In fact, it's a key skill area to develop in managing upwards successfully. To receive instructions correctly, you should first gain permission to ask questions to clarify. You may say, “I'd like to do this really well, so can I ask you some questions to be sure I understand you correctly?” And then make sure you ask clarifying questions like, “What exactly do you want me to do?” and “You say you want me to deliver it to you by Friday. Can I ask how specifically you want that?” Also, paraphrase to verify understanding by following up with, “So if I understand correctly, you want me to do X and let you have it in writing by Friday at 2pm.” And, once you're sure that you understand what your boss wants, recognize that this can be the best time to ask for any support or resources you need to help you comply.

Suppose your manager presents you with a task or project to do, and you believe you understand what you are being asked to do. Imagine this is actually your client giving you a mini-contract to deliver. It’s your duty to be sure you have understood the brief correctly!

Let’s return to Sam and Olivia. After Olivia reads and digests Sam’s email, she has a meeting with him. She points out that the company doesn’t have the budget to implement all of Sam’s ideas, and she suggests that he should focus on three easy-to-implement ideas that will deliver quick results. Sam clarifies with her which ideas he should implement. And he assures her that he’ll focus on delivering results to the Facebook followers, rather than on aiming to develop his team’s creative skills. He’ll leave that for another project. They agree to keep a close eye on the project budget and Sam promises to send her weekly updates.

Now, as leader, as well as correctly receiving instructions, you need to be able to receive feedback. Indeed, being able to receive and respond effectively to feedback, even critical or harsh feedback, can optimize your performance. And this, in turn, can increase trust between you and your boss.

Feedback is a natural part of everyday life at work. In fact, it is a necessary fuel for improving, adjusting, and correcting performance and results. When you receive feedback effectively, life gets richer and easier for everyone. Managers and colleagues will often put off giving feedback, especially if they think of it as being negative. If they know that even negative feedback is genuinely welcome to you, they will be more willing to be open with you, because you make it easy. This also builds trust and makes agreement and cooperation simpler.
To receive feedback effectively, first welcome the feedback and express gratitude for it. Also, get permission to ask questions and clarify. And finally, paraphrase to ensure you have understood and say thanks again.

There may be a further phase of agreeing what you will do about the feedback if it requires action or a change of behavior from you.

If, when feedback is offered to you, your response is to welcome it and express gratitude, you immediately ease any tension that your manager may feel. This enables you both to have a productive discussion.

Let’s return to Sam and Olivia. Sam was explaining why the project was starting to go over budget. Olivia kept her head down and continued writing furiously. Sam was beginning to feel that he was talking, as usual, to the top of Olivia’s head.

Sam asked Olivia what she was writing. Olivia was taken aback by this. She explained that when someone talks to her, she often gets distracted visually by their movements and gestures. And she pointed out that Sam was a very animated talker! As a result, she’d lose track of what he was saying. So she preferred to focus on listening to him and writing down what he said.

Sam remembered that Olivia preferred reading ideas rather than hearing about them. So, at the end of the meeting, he agreed to draft Olivia some notes to back up what he’d told her and to give her time to read them over, and he promised to return to the office the next day to discuss them. By understanding his boss’s style and being open to feedback, Sam was able, in turn, to manage upwards and develop his working relationship with Olivia.

**Understanding Your Boss's Perspective**

To effectively manage upwards, you need to be able to understand your boss's perspective. In other words, try to recognize where they are coming from, what demands are on them, and so on. You can then help to make life easier for them.

There are three strategies you can use to do this: recognize that a boss or manager shares their work, imagine what it would be like to be your manager, and explore how your objectives fit with those of your manager and colleagues.

First of all, recognize that a boss or manager shares their work. After all, the very existence of a team or department implies that it takes more than one person to do all of the work. It may also be that the range of expertise, knowledge, and experience required may not reside all in one person. Your manager, however, is the job-holder for all of the team’s work, and everyone’s entire job is only part of the manager’s.

Accepting this puts your role in context, and enables you to keep your thinking and behavior relevant. It is not uncommon for team members to pursue their own beliefs and opinions about what they should be doing, sometimes in isolation from what their bosses need. This can especially happen when they bring expertise that the manager does not have. They may be doing what they genuinely believe is required for the best of reasons. However, it can disrupt the intended flow of activity and create frustration for everyone concerned.
Second, imagine what it would be like to be your manager. It is not unusual for team members to believe they could do their manager’s job easily. On being promoted to that role, they usually get a shock!

Use your imagination to gain an idea of what it might be like to be your manager. Put yourself in his or her shoes. To do this, you need to pay close attention to your manager and the context in which he or she operates. If your manager doesn’t work in the same physical space as you, this may be more of a challenge. Consider if you were in charge of you and the other people you work with. What would be your biggest challenge? If you can observe or find out about the bigger context in which your manager operates, what might be your biggest challenge there?

The value of this approach is being able to understand something of the pressure your manager may be under at certain times. You can then understand how some of that can leak out to you. Being an ally to your boss is easier when you can volunteer to ease pressure points that are in your power to assist with.

Finally, explore how your objectives fit with those of your manager and colleagues. With naturally occurring heavy workloads, it is normal for many workers to focus on their own objectives. As a result, they may not really give too much attention to those of their colleagues or their boss. Finding out about your manager’s objectives, and those of your colleagues, widens your own perspective and helps you provide your best service.

Think about your job in terms of who may be your stakeholders. A stakeholder is someone who has an interest in or a two-way connection with you, or who is affected in some way by what you do or fail to do. Taking your manager first, in which parts of your job do you produce or do something specific that is critical for your manager? That is, if you do not provide it to a certain standard or deliver it in the right way at the right time, your manager cannot comply with part of her or his job. There may be more than one item that fits this description. And what specific parts of your work affect your colleagues in similar ways? And are there elements of your work that you cannot do or finish, if someone else fails to provide you with something? If you are a Project Manager, this will be pretty well all of your job!

When you do even this simple stakeholder and task analysis, it can reveal how much your ability to do your job and complete work on time may be dependent on other people. It can also show you which parts of your work most affect your manager’s ability to meet objectives. These may be the parts to work at getting right.

Consider this example. In the middle of a merger, where two marketing departments were being brought together, people were working in newly expanded roles and complaining of unclear objectives. One team leader proposed an idea to her marketing manager. She suggested that each team in their area could prepare a brief map of its stakeholders. It would ask the following question: “What do we output to them that they depend on to do their work effectively?”

Someone would then speak briefly to those stakeholders to determine how they needed to receive the team’s products. She proposed a verbal operation with minimal documentation to keep it brief and simple, and oblige people to meet and get to know one another. Back in the team, adjustments would be proposed and new updated agreements made with stakeholders.

By taking the time to understand what the stakeholders needed, the team leader was able to break down silos between teams and clarify objectives. The effort won accolades in the wider organization for the marketing manager.