



PRESENTED BY:  
Annie Hyman Pratt



Managing Up  
Year 2 - January 2018



“The goal of managing up is not to curry favor...It’s about being more effective”

- Liz Simpson  
Harvard Business School

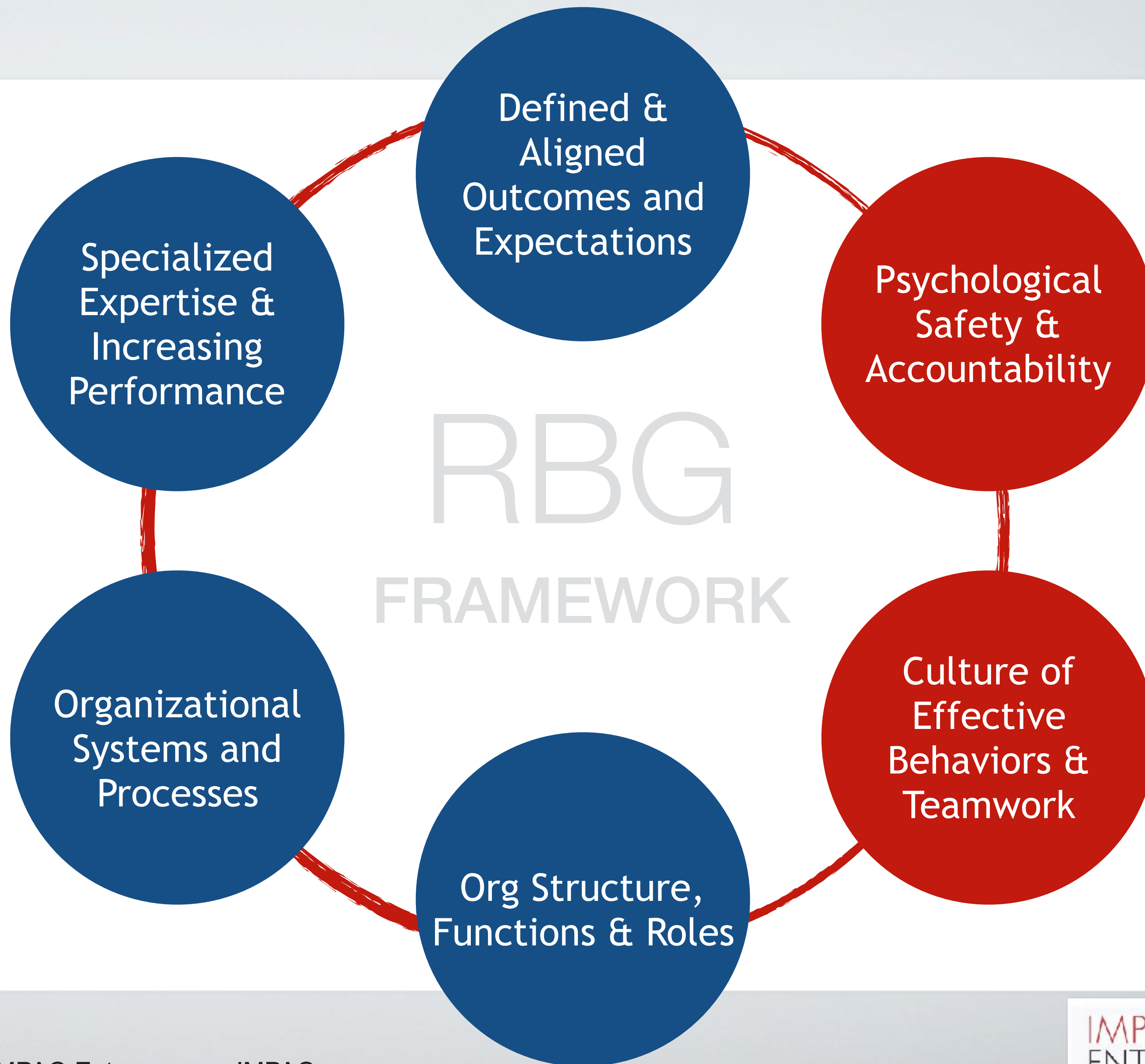


# Covering Today:

- **Managing Up** – What that really means
- **How to Manage Up**
  - Situations
  - Ongoing
  - Reporting
- **Traps and Pitfalls to Avoid**



# RAPID BUSINESS GROWTH FRAMEWORK





# Levels of Leadership



# Defined & Aligned Outcomes & Expectations



**GREATER PURPOSE**



**BIG OUTCOMES**

**External Drivers  
& Pressures**

**Cross-Functional**

Main Annual Goals

Priority Projects & Deliverables  
(to meet the goals)

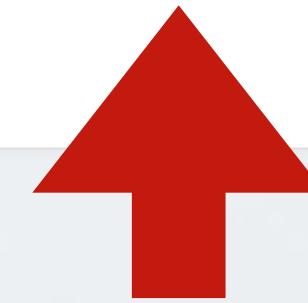
Functional and Tactical  
Projects & Deliverables

**FUNCTIONAL TASKS**

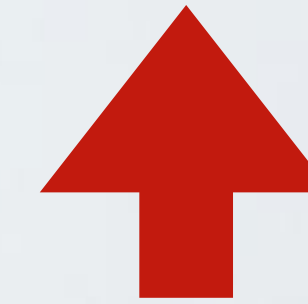
# For Your CEO's- Move up to their level!



**BIG OUTCOMES**



Main Annual Goals



Priority Projects & Deliverables  
(to meet the goals)



Functional and Tactical  
Projects & Deliverables

**Cross-Functional**

**FUNCTIONAL TASKS**



# Paint the Picture of the Highest Impact and Consequences







# Managing Up – What does that really mean?

1. Staying **proactively aligned** with CEO on expectations and goals
2. Delivering expected **results**
3. Keeping CEO **proactively informed** for projects and results being on track, or not, and what you're doing about it
4. When anything changes or results are at risk, taking **proactive responsibility** for generating new alignment and getting the results back on track

And they're humans too – with their own style, challenges, preferences.

Meet them where you can.....

# Managing Up



# How To Manage Up - #1 Situational

- **Shift PERSPECTIVES** – Put on your Top of the Triangle Hat, and stand in CEO's shoes
- **Raise issues** and situations **proactively AND FIRST** – before CEO!  
*(When CEO raise an issue first, you'll need to address why you didn't)*
- **PAINT THE PICTURE**
  1. Situation/Issue plus relevant context
  2. Highest up Consequences
  3. Solutions – what you plan to DO
  4. Alternatives – what else you thought of
  5. Your plan for next steps, follow up and recovery



- **COMMUNICATE**  
how it turned out, your learning, and any plans for additional changes for the future

# Keep Closing Expectation Gaps

**Unreasonable or Unclear Expectations Gap**

---

**Perception Gap**

---

**Performance Gap**



# Closing The Gap with GAPPA a.k.a. Holding Accountable

- **G:** Describe the Gap (expected vs. actual) plus the IMPACT (consequences of the gap)
  - **A:** Potential Adjustments / Solutions to reach the Desired Outcome
    - Performance- What we might “Do Differently” to reach the Outcome
    - Expectations- Where we might need to “Change Expectations or Outcome”
  - **P:** My Perceptions of the Potential Solutions (context for solutions I think are best)
  - **P:** Their Perceptions of the Potential Solutions (context for solutions they think are best)
  - **A:** New / Adjusted Agreement with Follow Up and Recovery
- ★ Key Behavior: **Talk Tentatively** to keep it safe!



# Key Behavior

## Talk Tentatively!

# How To Manage Up - #2 Ongoing

- **Shift PERSPECTIVES** – Put on your Top of the Triangle Hat, and stand in CEO's shoes
- Own the **RESPONSIBILITY** of keeping CEO appropriately informed
- **PAINT THE PICTURE**
  1. The highest up goals, expectations and desired outcomes you're going for, and if you're on track to achieve them
  2. When you're not on track, what you're doing to address it
  3. Share risks, challenges, and how you're mitigating
  4. Share where you need support, make it specific
  5. Share your insights and opportunities you see



- Share what you're thinking about the **FUTURE**, for the external market, for the company, and for your function



# Reporting: A Key to Effectively Manage Up Ongoing (and Down and Across too!)

1. Company Strategic Goals (formal / structured reporting)
2. Functional Goals and Projects (formal / structured reporting)
3. Ongoing Operations, Execution and Team (formal or informal)
4. Impacting the Future: Ideas, Concerns, Opportunities, Risks, Market (usually informal or at meetings)
5. Your Development and Well-Being (informal or formal - such as flash report )
6. Your Team's Development and Well-Being (formal or informal)





# Flash Reports – Informal Way to Communicate UP You Can Develop Your Own!

## Weekly Key Leader Flash Report

*Purpose: To provide the CEO a weekly snapshot of important business issues and intended actions*

**Anchor yourself in the desired business outcomes and your company B-State and ask yourself:  
“What really matters here and why, and what’s to be done about it?”**

- Status of the week’s **ACTIVE** priorities, goals, projects, initiatives – along with new and important insights
- Surface **CURRENT** problems, challenges, alternative solutions, decisions and intended **NEXT ACTIONS** (especially for next week)
- Proactive ideas and changes to support the **FUTURE** (and any actions you intend to take on it)
- How you and the team are doing, and what you’re doing or intend to do if things need to shift
- Optional: Steps you’ve taken or will take to develop yourself and others

# Traps and Pitfalls to Avoid



- **The Victim Loop!** Any attempt to “manage up” from the V loop will fail – don’t do it.....
- **Getting defensive** (aka covert blame)
- **Over communicating**, repeating yourself
- **Making demands**, or resisting new ideas or change
- Not taking into account **CEO’s preferences**, agenda’s or hot buttons – YOU KNOW THEM!
- Trying to resolve an issue when CEO is triggered



# ACCOUNTABILITY FOR HUMANS





Safety comes BEFORE Accountability

How can you make it Safer for Yourself when managing up?





## A Few Keys to Your Safety

- **Clear expectations are critical** – nothing is more unsafe than not knowing what's expected of you
- You need to **OWN** and **drive** this clarity of expectations – Don't rely on the CEO to do it
- Take responsibility for making yourself safe!
  - **Get yourself into the Accountability Loop**
  - **Use your tools** to express yourself – Those tools work!
  - **Bring tentative solutions**, even if you're not sure they'll work – this will help you feel much more grounded and focused on what you both care about
  - **Share your thinking out loud** – what you're thinking and why "your story" – this demonstrates your critical thinking abilities
- **Talk Tentatively!**



Safety comes BEFORE Accountability

How can you make it Safer for Your CEO when managing up?





## A Few Keys to Your CEO's Safety

- **Bring solutions and alternatives** – show your critical thinking – you're coming to them for support, not to be rescued
- **Talk from the Top of the Triangle**, or as high up as possible – this is what they care about!
- **Go first** – begin in the drivers seat, sharing solutions and options to achieve outcomes
- **Make it safer for your CEO** by sharing what you think they're thinking – saying the things that would be hard for them to say
- **Apply compassion** – Your CEO carry big responsibilities and their businesses and reputations are on the line!



## Final Advice for You:

“Believe in your own Competence (you got this), and in your CEO’s positive intentions (they care). When you hold those two thoughts together, your confidence will increase.”

-Annie



# IMPAQ ENTREPRENEUR

*Rapid Business Growth through Next-Level Leadership & Team Driven Results*

## **Annie Hyman Pratt** **IMPAQ Entrepreneur**

7785 West Sunset Boulevard  
Los Angeles, CA 90046  
323.969.0088 HQ  
[annie@IMPAQentrepreneur.com](mailto:annie@IMPAQentrepreneur.com)

[www.IMPAQentrepreneur.com](http://www.IMPAQentrepreneur.com)

# Remember, You're Human

