

Managing Upwards

- Build trust, communicate clearly & contribute upwards with confidence



What is Managing Upwards?

Write down any words or phrases that describe your view of managing upwards

Who Impacts Your Role?

Identify the senior people who impact your role

Relationship Audit

It is useful to examine your assumptions about the relationship. Try this checklist and tick any that apply.

How do you see them?

- | | |
|--------------------------------------|--|
| ☐ Friend | ☐ Hard taskmaster |
| ☐ Equal | ☐ Bully |
| ☐ Colleague | ☐ Competitor |
| ☐ Opponent | ☐ Shop steward |
| ☐ A liability | ☐ Snitch |
| ☐ Judge | ☐ Confidante |
| ☐ Mentor | ☐ Star |
| ☐ Ally | Other – if so, what? |
| ☐ Pest | _____ |

Now, try to imagine how they see you...

- | | |
|--------------------------------------|--|
| ☐ Friend | ☐ Hard taskmaster |
| ☐ Equal | ☐ Bully |
| ☐ Colleague | ☐ Competitor |
| ☐ Opponent | ☐ Shop steward |
| ☐ A liability | ☐ Snitch |
| ☐ Judge | ☐ Confidante |
| ☐ Mentor | ☐ Star |
| ☐ Ally | Other – if so, what? |
| ☐ Pest | _____ |

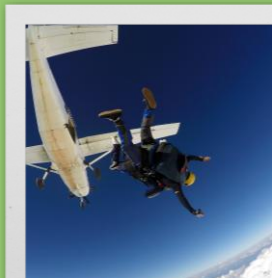
Personality Styles



Style A

- ▶ Detail
- ▶ Order
- ▶ Logic
- ▶ Facts
- ▶ Structure

My notes:



Style B

- ▶ Hitting objectives
- ▶ Competitive
- ▶ Achieving results
- ▶ Getting things done
- ▶ Bottom line

My notes:

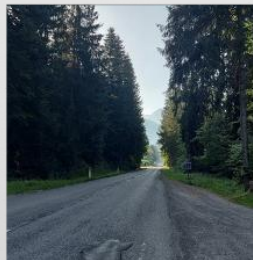
Personality Styles



Style C

- ▶ Impact on others
- ▶ Teamwork
- ▶ Feelings
- ▶ Caring
- ▶ Friendship & loyalty

My notes:



Style D

- ▶ Concepts
- ▶ Imagination
- ▶ Discovery
- ▶ Future
- ▶ Creativity

My notes:

Familiarity Test

How well do you know your senior person?
Score each item out of 10 (1 low, 10 high)

Their likes and dislikes?	
How they like things done?	
What they expect from you?	
Who they trust?	
The pressures on them?	
Who gives them a hard time?	
Their personal and professional history?	
What matters to them?	
What drives them?	
What scares them?	
What makes them angry?	
Their ambitions?	
Their strengths as a manager?	
Their weaknesses as a manager?	
Their leadership styles?	

Managing Upwards Behaviors

Tick what you may need to do more of...

Build good relationships with the senior person's team.	
Find out how they like things presented.	
Come with solutions, not problems.	
Sort things on your own, as far as you can.	
Don't embarrass them.	
Be clear about your recommendations.	
Ensure you feedback good news.	
Volunteer to take some of the load.	
Always do what you said you'd do.	
Try to see their problems through their eyes.	
Give positive feedback when it's sincere and authentic.	
Be clear about your own boundaries.	
Keep confidences.	

Managing Upwards Behaviors

Tick what you may need to do more of...

Don't gossip.	
Go the extra mile.	
Be a team player.	
Manage your own stress well.	
Organise yourself well.	
Share enthusiasm.	
Be loyal.	
Be available.	
Be prepared to listen.	
Support them in public.	
Act as critical friend in private.	
Protect their back.	

Circle where you need to get to know your senior person better (i.e., your low scores). This is a ready-made action list for improving your relationship!

Get Involved!

Which project or piece of work can you offer to help with?

The Bigger Picture!

What do you need to do to understand the bigger picture & what can you do to fill any knowledge gaps?

- ▶ Think of your current approach.

Identify what works well and what doesn't.

Consider how you could adapt your style for different situations.

Note one change you will try next time.

For example: the 3 Cs (clear, concise, and contextual), BLUF (Bottom Line Up Front), using a consistent weekly update template for easier scanning, or choosing the right communication channel.

Case Study 1

Name: Jamie

Role: Senior Marketing Analyst

Manager: Priya, Director of Marketing

Jamie has been in their role for two years and is known for delivering on time with high-quality work. However, Jamie's manager, Priya, has a reputation for micromanaging — she:

- ▶ Insists on being cc'd on all team emails
- ▶ Regularly rewrites Jamie's reports
- ▶ Joins client calls unexpectedly
- ▶ Asks for multiple daily status updates
- ▶ Makes corrections on formatting instead of strategic content

Jamie feels frustrated and demotivated. They don't feel trusted, and their creativity is shrinking. They want to maintain a good relationship with Priya (who has a strong influence in the company) but also need autonomy to thrive.

You are Jamie and have decided to address the issue diplomatically.

Case Study 2

Name: Dana

Role: Project Coordinator

Manager: Alex, Senior Operations Manager

Dana is leading a high-stakes internal initiative that requires cross-functional collaboration. Her manager, Alex, is highly respected but frequently unavailable due to:

- ▶ Being in back-to-back meetings
- ▶ Delayed or no responses to emails and messages
- ▶ Cancelled or rescheduled 1:1s
- ▶ Lack of input on time-sensitive decisions

Alex trusts Dana and says, "I trust you to run with it," but gives minimal guidance or feedback. Dana appreciates the trust but is starting to feel unsupported, isolated, and uncertain about priorities. Decisions are getting bottlenecked because Dana doesn't know when to move forward or when to escalate.

You are Dana. You want to maintain your momentum and decision-making confidence without making Alex feel criticized.

Case Study 3

Name: Sam

Role: Team Lead, Product Development

Manager: Monica, VP of Product

Sam has been in the team lead role for 6 months, after a strong performance in a more junior role. However, things have been tense with their new manager, Monica. Despite Sam's efforts, Monica:

- ▶ Double-checks every decision Sam makes
- ▶ Overrules their suggestions in front of others
- ▶ Rarely delegates anything critical
- ▶ Requires detailed justifications for small requests
- ▶ Speaks more openly with other team leads

Sam feels undermined, micromanaged, and worries Monica doesn't trust their judgment or leadership ability. Their confidence is dropping, and team members are starting to notice the strain. Sam wants to rebuild trust and prove their capability, but without pushing Monica away or acting defensively.

You are Sam. Your goal is to shift Monica's perception, build credibility, and reduce the trust gap without creating conflict or making it personal.

Case Study 4

Name: Eloise

Role: Program Manager, Customer Experience

Manager: Jordan, Head of Strategy

Eloise is leading a cross-functional initiative to improve customer onboarding — a priority that was greenlit by leadership last quarter. Her manager, Jordan, was highly engaged in the beginning but has recently started sending mixed signals:

Delayed or no responses to emails and messages

- ▶ One day urging Eloise to speed up implementation, the next asking for deeper research and analysis
- ▶ Assigning Eloise ad-hoc tasks unrelated to onboarding (e.g. pulling reports, supporting other teams)
- ▶ Cancelling steering committee meetings
- ▶ Forwarding competing priorities from other VPs without clear guidance

Eloise feels stuck: if she pushes forward, she risks being "off track"; if she waits for direction, the project stalls. She's not sure what Jordan wants most — or whether Jordan knows themselves. Eloise wants to regain alignment, keep the onboarding project moving, and manage Jordan's conflicting asks without seeming resistant or overwhelmed.

You are Eloise. Your goal is to manage upward diplomatically and get clarity to move the project forward — without blaming Jordan or appearing confused.

- ▶ Think of a real situation to discuss with a senior person, for example needing more staff, wanting more responsibility, or proposing a new solution.

Write how you'll approach the conversation: what you'll say & how you'll say it.

- ▶ In pairs, practice raising your issue and responding to possible challenges. (3mins each)
- ▶ Give feedback to each other after each discussion. (2 mins each)

Feedback Notes

What do you need to do more of and what do you need to do less of?

Identify three clear actions to implement within the next month!



Find Out More

We can help your entire organization
transform work for the better.

Contact your nearest office

www.thinkproductive.com



Share your learning journey with us!
@thinkproductive
#ProductivityNinja