THE UNWRITTEN RULES OF MANAGING UP

Project Management Techniques from the Trenches

Dana Brownlee, PMP

Praise for *The Unwritten Rules of Managing Up*

"The unwritten rules have finally been written! This book provides an effective road map for successful and efficient communication for all levels and roles at a company."
—Jim Mains, CEO, Shoelace Wireless

"This is a must-read for bosses and subordinates alike, as it exposes our flaws but teaches us how we can work together to achieve our common goals."
—Ellen Coulter, President, The Advantage Software Company

"Dana Brownlee outlines the many different scenarios we can find ourselves in and provides practical, "real life" tactics for managing up to the best or the most challenging boss. I would recommend this book to anyone seeking the benefit out of every workplace relationship."
—Allison Gilmore, Director, Doctoral Program in Business, Emory University

"Dana Brownlee tackles a tough subject and provides techniques that are easy to understand, thorough, and well-researched. Readers will walk away with a plan for how to communicate better and have great success in dealing with leaders of all types."
—Barbara L. Mason, owner of Career Pathways Consulting

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DANA BROWNLEE, PMP

BK®

The Unwritten Rules of Managing Up

*Dedicated to Mom, Dad, Todd, Shaun,
Ari, and Austin for putting up with my "difficult
boss" tendencies every now and then.
Thanks to Berrett-Koehler for believing in me.*

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Introduction

The corporate workplace is an interesting and sometimes tragic organizational ecosystem. The often unspoken truth is that so many work environments suffer from an anachronistic, primitive organizational culture developed around an "us vs. them" hierarchical food-chain mentality—pitting leadership against subordinates (and vice versa). In many ways, the hierarchy that defines so many organizations reinforces the mythology that those in a leadership or managerial capacity are better, smarter, all-knowing, perfect decision makers poised to lead their teams to success if their subordinates would just flawlessly execute their every demand. That might work with superhuman leaders, but anyone who has worked in a real workplace knows that we're dealing with mere mortals. What's more realistic (here on planet Earth, at least) is that leaders and managers, like all of us, are typically flawed in one way or another and oftentimes truly need help and support from subordinates and staff to optimize success (if not to avoid all-out calamity every now and then). While those at the top of the organizational food chain are typically more experienced and hopefully effective decision makers, success is optimized when everyone has each other's back irrespective of hierarchical level or title. In many ways that's what managing up is all about.

Another often whispered, rarely publicly acknowledged reality is that there is a distinct segment of the leadership pool that is just downright difficult and/or challenging. There are many varieties of the difficult

boss—some may have behaviors or personality quirks that create a difficult working environment, others may create problems instead of preventing them, while others may be weak and ill-equipped to adequately support the team. Encountering a difficult boss isn't the rare Loch Ness Monster or chupacabra myth—something you've read about but never seen; it's a fairly common experience. If you work long enough, you'll certainly find yourself struggling with a challenging boss at some point. This means that subordinates are too often faced with the Darwinian reality of needing to navigate their difficult boss's significant flaws in order to avoid poor business results, unpleasant work environments, or even personal career limitations. Indeed, learning to manage up is not a luxury but too often a necessity for success. This book seeks to demystify managing up—to clarify what it is and isn't, explain why virtually everyone should do it, and, more importantly, reveal the ins and outs of doing it well!

The book pulls from not just my own research and personal experience but also from powerful testimonies and tried and true recommendations, tips, and suggestions from more than 1,100 survey respondents on this topic. You'll find survey data, findings, and verbatim comments sprinkled throughout the book. I've compiled these best practices that have been used in the trenches, on real projects, in real work situations to provide you with an arsenal of tips and techniques to use when you're faced with a less than effective boss or senior leader.

WHO IS THIS BOOK FOR?
Yes, I'm biased—the capitalist in me screams, "EVERYONE!" But seriously, I honestly think the book can be helpful to anyone in the workplace and particularly helpful to recent college graduates, early career professionals, or rookie project managers. These professionals will typically encounter a variety of managers throughout their career, and learning to manage up is a critical skill set that can be used with a wide range of senior leaders, from the amazing manager to the one who is downright pitiful. Whether your work environment is traditional with lots of layers of management or more nontraditional with dotted-line matrix style reporting or a flatter management structure, these skills can help virtually anyone work more effectively with professionals who have more power and influence in the organization

(irrespective of their specific title). Even after having been an entrepreneur for more than fifteen years without a boss, I've found the techniques helpful when dealing with difficult clients, colleagues, or partners. In short, while I refer to the "difficult boss" throughout the book, I use it as a generic label for any challenging senior leader, executive, client, or partner whom you might be dealing with now (or might encounter, to your dismay, in the future). Too many people come up to me after a presentation or training class exclaiming, "I wish I'd heard this two years ago when I really needed it!" So my mantra is that it's always better to have the tools in your toolbox before you need them. Obviously, the book targets two primary audiences—leaders and subordinates—and I try to speak to both. While the focus is on providing tips for managing up (focused to the subordinate audience), the book also speaks to leaders in an attempt to help them better understand their flaws and how they might affect others, so that they can work to minimize them.

If you're thinking to yourself after reading the subtitle, "I'm not a project manager. I'm just trying to figure out how to deal with my crazy boss," please keep reading. First, the book is largely focused on just that—demystifying the difficult boss. Oftentimes they're just misunderstood, and we'll explore some of those misconceptions. We will also explore several variations of the difficult boss and equip you with specific techniques (many of them time-tested project management best practices) that anyone can use to effectively manage and partner with a difficult boss. Second, *everyone* is a project manager! If you've planned a wedding, organized a family trip, thrown a kids' birthday party, or managed a work-related effort with a few moving parts, you are a project manager. You may never have held that title, but you've certainly done the job. There are many different definitions of a project. My personal definition is "a reasonably complicated effort focused on producing a specific result within defined parameters," and everyone has embarked on that at some point in their personal or professional lives. Indeed, the broad umbrella of "project management" is a well-regarded discipline providing valuable tools and techniques. Even if you haven't worked in the project management arena, why not use some of those techniques to deal with issues we all face?

This book focuses on providing practical advice that's most likely to work in real-life situations. As such, the project management concepts are pulled from a wide variety of sources, including traditional project management theory and methodology, project management training, survey feedback from people just like you, and, most importantly, practical experience. Since the content is unabashedly focused on practical experience, there will certainly be discrepancies and departures from formal, academic management theory with regard to referenced tools, techniques, definitions, and so on, and that's quite intentional. My goal is not to regurgitate or repackage academic theory or best practices, but instead to customize (and reference where appropriate) existing theory and best practice to provide the reader with more robust, practical suggestions—from the trenches, not the textbooks!

THE GENESIS OF THE BOOK

Unfortunately, one of the universal hallmarks of the first decade or so of work experience for most people is having a difficult boss (or two, or three, if you're unlucky). I actually consider myself one of the lucky ones. During my tenure in the corporate jungle, I was blessed with mostly mediocre to downright likable managers, but as a project manager (and then later as a corporate trainer), I also supported senior-level stakeholders and clients with personalities that ranged from fierce and motivating to scattered and delusional. Certainly as a professional corporate trainer and speaker since 2003, I've become convinced that there are a lot of bad bosses and senior leaders out there causing many teams and individuals a lot of sleepless nights. Indeed, I think we're in the midst of a true leadership crisis—just when more and more organizations insist that they need everyone to step up and show leadership.
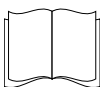
One of the activities I've conducted for years as a corporate trainer is called "The Best/Worst Leader You Ever Had." During the activity, I ask participants to document (on sticky notes) traits of the best and worst leaders they've ever experienced. I draw a line down the center of the flip chart for each group and label the left column "Best Leader" and the right column "Worst Leader." Small groups then document their collective listing of the traits of each. I was amazed (and somewhat perplexed early on) by how often groups would skip the left column entirely to start working on

the Worst Leader list of traits first. Indeed, they often explained that they didn't have many Best Leader examples to pull from so they skipped right to the Worst Leader list (since their bank of references for those was vast). When we conducted readouts from the activity, there would be so much energy, passion, and enthusiasm during the lively discussion and sharing of anecdotes about the worst leaders. There were lots of "amens from the choir," hand slapping, and laughing. You could tell the group was bonding over these common bad boss experiences. However, when we discussed the best leaders, the silence was deafening. One or two anecdotes would be shared that others seemed to admire, but there wasn't nearly the same common experience that everyone could relate to. As the years progressed, I noticed a similar phenomenon during my speaking engagements. I'd speak on a wide range of topics (leading effective meetings, project management best practices, building strong teams, enhancing team communications, etc.), and I noticed that irrespective of the topic I was covering, one of the first questions during Q&A would usually be some version of "But how do these techniques work if my boss is the problem?" I received the question so often that in 2010 I wrote a white paper entitled "The Project Manager's Guide to Managing Difficult Sponsors." As I received more and more requests for advice, I updated my content arsenal to provide techniques for managing a wide variety of difficult bosses. Years later, I wrote the manuscript for this book with two primary goals in mind:

- Helping leaders by giving subordinates tips on how to make their life easier
- Helping subordinates by equipping them with practical techniques to maximize their effectiveness with virtually any boss type

HOW THE DIFFICULT BOSS CHAPTERS ARE ORGANIZED

To promote a sense of consistency, each of the difficult boss chapters has been organized similarly (with icons provided for easy reference, see Figure 0.1):

| Icon	Chapter Content
	Sample dialogue representing a particular boss type is presented.
	The boss type is defined, including typical characteristics and behaviors.
	Recommended tools and techniques are provided to help the reader effectively partner with and support that type of boss/senior-level leader.
	Self-assessments provide the reader with insight into whether they might possess characteristics of this particular type of difficult boss.
	Improvement strategies are suggested that the reader can use to minimize this boss personality type.

Figure 0.1 Difficult Boss Chapter Section Components

Defining the "Difficult Boss"

To research the concept of managing up—and managing the difficult boss in particular—my company, Professionalism Matters, launched an online survey asking a wide range of professionals to share feedback (anonymous) on their managers, particularly the difficult ones. I was somewhat afraid I'd get crickets, to be perfectly honest. I'm well aware that employees are often very reticent about providing candid feedback on their experiences with their own leadership. I was truly blown away to receive 1,173 completely organic, candid responses from real people working real jobs that we can all relate to. While the empirical data was fascinating—confirming my suspicions in several areas, providing surprising results in other areas, and overall unlocking and unleashing immensely valuable practical advice—the anecdotal feedback was priceless. It was the type of feedback and advice you'd typically only get from a circle of really close friends sharing the unspoken rules that most people won't explicitly tell you (often until it's too late). In my experience, it's the water-cooler side conversations or frank admissions over a cocktail with a dear friend after a particularly hard day that are the golden nuggets of advice that too many employees never get (or get too late in their career). These "rules" that you typically can't find in a training class or a new employee orientation are invaluable, so without further delay, let's dive right in to share some of the survey results.

Survey feedback clearly confirmed that difficult bosses are indeed prevalent (see Figure 1.1). When asked *How often have you experienced "difficult bosses" or "difficult senior leaders" over the course of your work history?* over

Types of Difficult Bosses Encountered
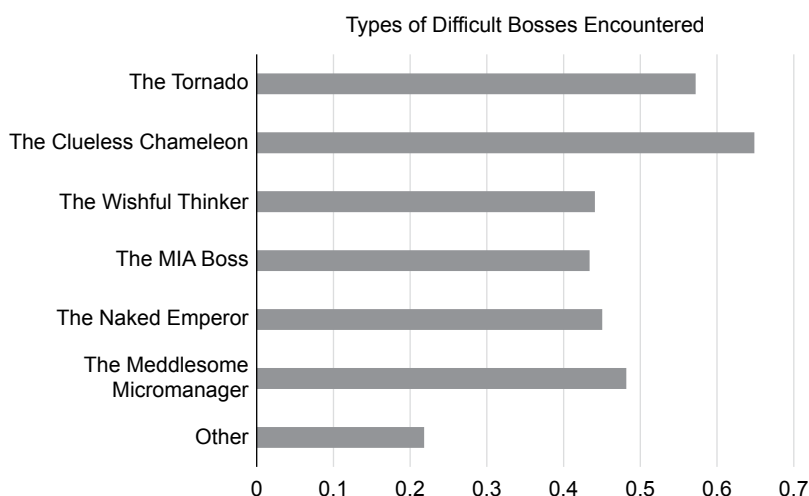
Figure 1.1 Types of Difficult Bosses Encountered. Source: Professionalism Matters, Inc., Managing Up Survey, March 2018, 1,173 responses. Respondents represent various industries.

36 percent of survey participants responded "Often" or "Always." Ouch! That's more than one in three participants indicating that they've experienced difficult bosses not occasionally or rarely but frequently! Over 50 percent selected "Sometimes."

When asked *Which types of "difficult boss" behaviors have you personally encountered?* the top two vote getters from the options provided were the Tornado (dominating meetings and discussions) and the Clueless Chameleon (constantly changing their mind and/or not providing clear expectations). Over 57 percent of respondents indicated that they had experienced the Tornado, and nearly 65 percent of respondents had experienced the Clueless Chameleon. (Participants were permitted to vote for more than one type of difficult boss or senior leader.) Another glaring takeaway from the survey was that participants indicated loud and clear that this question omitted another very prevalent type of difficult boss—the Meddlesome Micromanager, so I've included techniques to address that type in this book.

"DIFFICULT BOSS" IS A RELATIVE TERM

Anyone who has supported different leaders or executives in some capacity would agree that the concept of a "difficult boss" is a relative term. Indeed, one typically tends to assess a particular boss's level of "difficulty" in part

based on their experiences with other bosses or one's personal preferences or expectations. As we consider the concept of managing up, it is important to not take a monolithic approach; instead, recognize that managing up techniques should be customized to each individual situation. As much as we might wish there were, there are no silver bullet techniques that work for every manager and situation. This book provides a range of specific, practical techniques that can be used to address a wide variety of situations. Specifically, the book addresses two of these three different types of organizational/managerial realities:

- Managing up when you have an average to strong boss
- Managing up when you have a difficult boss
- Red alert situations—when managing up techniques alone are typically insufficient and alternate action or additional support is needed

The first situation is the easiest to handle, so although we will explore many applicable techniques for managing up with the average to strong boss, we focus first and primarily on the most challenging situations—how to handle the dreaded difficult boss. We'll come back to general tips for managing up with an average to strong boss toward the end of the book, but I'd like to preview some of these fundamentals that can provide a foundation for handling the more delicate and challenging difficult boss situations.

Managing Up Tips for the Average to Strong Boss

Tip #1   Build relationships *before* you need them.

Tip #2   Be likable and low maintenance.

Tip #3   Be a star where you are.

Tip #4   Customize your behaviors to fit your boss's preferred work and communication style.

Tip #5   Always think three steps ahead. Think strategically.

Tip #6   Look for opportunities to take things off their plate.

Indeed, the deliberate emphasis on the difficult boss situations should *not* be construed as a suggestion that managing up only applies to difficult bosses—on the contrary, the skills and techniques are powerful for great boss situations as well. In contrast, the last situation is beyond the scope

of this book. The true "red alert" situation can't typically be addressed through managing up techniques, so we will touch on some of those situations briefly to help point you in the right direction for additional support (more on this later).

Considering the wide range of managerial realities, I'm reminded of the infamous DEFCON (short for defense readiness condition) scale that measures the nation's level of defense forces alertness. DEFCON 5 represents a normal state of peace where US forces are at the lowest level of readiness, and the level numbers decrease from there with increasing levels of defense readiness (preparation for possible war). DEFCON 1 represents the highest state of alert (the worst-case scenario).

This DEFCON scale has always reminded me of the workplace. At times, I've enjoyed workplace bliss (DEFCON 5/4), but there have been other times when the environment became quite difficult and challenging (DEFCON 3/2), and I had to dig deep into my arsenal of techniques to try to emerge victorious (or at least without a ton of shrapnel wounds). As such, the tactics outlined in the book should always be customized to the individual workplace situation and level of organizational dysfunction and toxicity. Figure 1.2 outlines the basic managing up focus for a range of different organizational environments. Note that the recommended managing up focus for the great situations (DEFCON 5/4) are also applicable for more challenging situations (DEFCON 3/2). However, the more challenging environments require advanced, more specialized techniques as well; hence, the decision to focus primarily on those situations.

WHAT ABOUT THE DEFCON 1 SITUATION?

This book provides great tools and techniques to manage up with DEFCON 5/4 great bosses and the DEFCON 3/2 flawed bosses, but we don't specifically address the worst-case scenario: the DEFCON 1 bosses or workplace environments. And we exclude them from the scope of this book for good reason—because managing up strategies alone typically won't work, and it would be a disservice to the reader to suggest otherwise. In my view it would be akin to recommending vitamins to treat a broken bone. Indeed, this situation reminds me of calling my kids' pediatrician. The voice response system always starts with something like "If you're experiencing a life-threatening emergency, please hang up and call 9-1-1." So that's my

DEFCON 5	DEFCON 4	DEFCON 3	DEFCON 2	DEFCON 1
Managing Up Focus				
Making the boss's job easier		Making the boss's job easier		Beyond the scope of this book
Being easy to manage		Being easy to manage		Managing up techniques alone won't work
Building strong relationships		Building strong relationships		Seek support from HR, legal, or law enforcement as needed
Seeking opportunities to create organizational value		Seeking opportunities to create organizational value Helping the boss maximize success in spite of their flaws Adjusting behaviors to better suit your boss's style/preferences Tactfully pushing back as appropriate to avoid potential mishaps and increase productivity		Consider leaving the team or organization if the work environment is toxic

Figure 1.2 Customizing Managing Up Focus/Tactics for Your Organizational Environment

message—if you find yourself in a true DEFCON 1 situation, put the book down and seek help immediately!

While these DEFCON 1 situations are clearly beyond the scope of this book, I would like to take some time to address DEFCON 1 bosses. They're out there and, unfortunately, some readers may encounter them during their careers.

First, let's define what we mean by DEFCON 1 bosses. We're referring to managers (or senior leaders) who are engaging in toxic or severely dysfunctional behaviors or who possess other deeply disturbing personality or character traits. Examples include the following:

- Sexual harassment or inappropriate sexual behavior
- Overtly racist or misogynistic behavior
- Violent or abusive behavior
- Illegal acts
- Clearly volatile, seemingly emotionally or mentally unstable behaviors