Update

Leading Up: Guiding Your Leaders to Effectively Support Your Team's Efforts

by Pollyanna Pixton
and Jenni Dow

In today's rapidly changing environment, it is critical to deliver results often and quickly. This requires leading effectively both upward and outward. How can we guide our leaders to provide the support our teams need? What are the tools to embrace change, foster innovation, and collaborate — no matter where you fit in your organization?

Knowing when and how to lead up will help you successfully reach corporate goals and results by gaining the information and tools your team needs to reach its goals. This is often called "managing your manager." Upward leading puts the organization's purpose ahead of personal agendas.

Effective upward leading is done by being aware of your leader's strengths and weaknesses, understanding your leader's motivation and working style, surveying context and politics, and watching your timing. Lead upward and outward when you need help in:

- Delivering results and reaching project and organizational goals

- Gaining the strategies and tools needed to succeed

- Embracing change while protecting project boundaries from interference

- Collaborating across teams on results and clarifying business value

WHEN TO LEAD UP

Contrary to popular opinion, leading up is not about manipulation or playing politics. It is about getting what you need to lead and for your team to succeed while maintaining your integrity in the process. Leading requires providing the right tools, creating an open environment, removing obstacles, and protecting your team's project boundaries. Specifically, you may need to:

- Deliver a message to your leader that needs action

- Get the resources and information that you and your team need to succeed

- Meet your leader's expectations so you can focus on your work

- Reduce the interference from above to protect your team/ project's boundaries

SPEAK SO YOU WILL BE HEARD

Leading up is about speaking so you are heard. How is this done? Understand your leader's focus and how she defines success. Does she look at the numbers only? Is her

success based upon on-time product delivery? Is customer satisfaction her high priority? Can you frame your communications in these terms? Once you understand what motivates your leader and what is important to her, frame your discussions around what she sees as key to the organization's success.

"The software team is dying down there. They're working day and night!" This is a common complaint of project managers to their leaders. But the leader wonders what the problem is; after all, the team is getting the work done. Reframe the discussion by saying, "I've run the numbers and if we hire two more developers, we can decrease our delivery time and increase our group's profit margins by 10%." Speak in the language your leader understands. Speak so you can be heard.

COMMUNICATE OFTEN

Focus on business value at all times. If you have concerns, bring solutions based on business value to your leader along with these concerns. Propose ideas and offer cost-effective methods to implement your ideas. You may not always get what you want, but you will be perceived as a problem solver.

Determine how much and how often you need to report back to your leader. Many people feel if they just do their work and do it well, they will be noticed. However, in many work environments, people drop by or send a note to their leader letting them know what is happening with their projects or responsibilities. What is the best way to let your leader know how things are going in your area? As you are establishing your relationship early on with your leader, it is important to report on what your team is doing and to report often, in some cases at the end of each day. It's simply a matter of keeping your leader informed about relevant issues, solutions in the works, and intermediate results.

Use a form of communication that works for your leader. Does he prefer e-mail, a printed memo, a scheduled meeting, or a quick in-person chat? Adapt your style to fit your leader's work style; your leader doesn't have time to figure out how to work with your style.

A final critical piece of communicating is to realize that timing is everything. You want to approach your leader when he is not or will not be distracted by something else. Unless you have a life-or-death issue, it is better to wait until you have your leader's full attention — when he can be open to what you have to say.

PROTECT TEAM BOUNDARIES

To protect the boundaries of your project team, you need to reduce interference. Often, this is because your leader is unsure or nervous about getting the expected results. Ask your team for intermediate results and delivery dates. Let your leader know what your team has promised to deliver and note when this goal has been reached. As your team consistently and frequently delivers, your leader will ease up and give your team room to work.

RECOGNIZE YOUR LEADER'S STYLE

Dealing with various leadership styles within your organization can be challenging. Some leaders are autocratic, some democratic; some micromanage, some are completely hands-off. Sound impossible? It is just a matter of navigation.

Recognize your leader's style and work with it. If it's command-and-control, be open and respectful. Don't take dictatorial orders personally. Focus on success. With an autocratic leader, small steps are what it takes to lead upward. The opposite extreme is the hands-off leader. A leader who offers no guidance may throw her teams into chaos. In this case, ask questions

and keep asking until you understand the organization's expectations of the team. A micromanager needs reassurance. He is insecure — either about the project's path, your leadership abilities, your team's capabilities, or himself. Report daily on what is happening with your team and your work to reduce his anxiety. Finally, the democratic leader is open and collaborative. These are the easiest leaders to work with. They understand when to offer guidance and when to stand back.

To navigate these leadership styles, you do not have to modify your own. You simply need to communicate in a way they can relate to. Don't let your leaders get you angry and frustrated. Be proactive, not reactive. At times, you may want to say, "I'll get back to you on that." This will give you some time to be proactive. Remember, just because someone has the position, it does not make them a good leader.

COLLABORATE SUCCESSFULLY

Collaboration plays a critical role in successful upward and outward leadership. It is easier to achieve results when everyone is on board and working toward the same goals. So how do you lead collaboration across your organization?

First, convene the right people for discussion, decisions, and implementation. Once you all agree to the project goals and purpose, brainstorm solutions and ideas, group these items together, and then prioritize the groups based on business value. Let team members volunteer for what they want to do (i.e., where they have passion) and let them commit to target due dates. Now your job is to get leaders to stand back and let the team accomplish what it has set out to do. Speak so you can be heard, watch your timing, deliver as committed, or report roadblocks with solutions.

MANAGE YOUR RISKS

All leadership requires risk, and some might argue that leading up often involves a great deal of risk. You may be seen as obstinate, obstructive, not a team player, or unproductive, while the opposite may be true. Misunderstandings can happen, and you might not have time to correct it. To mitigate this risk, collect as much information as you can about the topic at hand, how open your leader might be to ideas, and what positions she may have taken on such topics in the past.

Ask questions. It is easier to avoid misunderstanding when you are asking questions. Even your solutions can be framed as questions. When leading up, do you need to have credit for the solution? This comes back to putting the organization's purpose over personal agenda. If you need recognition, maybe leading up is not an option for you at this time. Note that a good leader will recognize you.

What are your risks when you lead up? Can you deal with humiliation? Demoralization? Losing your position? Your influence? Your job? When leading up in uncertain environments, any of these things can happen. Make sure you are clear about the options available to you.

Maintaining your integrity is paramount. Know that you do not have to respond to old-school behaviors with old-school behaviors. Build a support network that includes a mentor within or outside the company. Recall past cases where you took risks successfully. In the worst-case scenario where you do get fired or are forced out of your position, take some time to step back and reflect, don't immediately react.

Well-managed risk is living with uncertainty. Wait until the latest possible time to make a decision and develop options as you gather information. This way you give yourself a higher probability of making the best decisions and finding the optimal solution.

When you act with integrity, work to provide your teams with everything they need to succeed, and create a place where people want to work, you cannot fail.

SUMMARY

Putting the organization's purpose above personal agenda is the key to leading up. Suggestions include:

- Know when to lead up (e.g., when you need to deliver a message that demands action; when you need to get the resources you and your team need to succeed).

- Discover your leader's style so that you can match your message and deliverables to the requirements.

- Speak so your leaders can hear you; learn their language.

- Hone your message, don't just present problems, bring solutions.

- Manage your risk.

ABOUT THE AUTHORS

Pollyanna Pixton founded Evolutionary Systems in 1996, a business consulting firm that takes companies to the next level through collaboration and collaborative leadership. As the result of a think tank she formed two years ago to address how to improve innovation in today's organization, she cofounded and directs the Institute of Collaborative Leadership. She brings more than 35 years of executive and managerial experience from a variety of successful business and IT ventures to her company and institute. Ms. Pixton was primarily responsible for leading the development of the Swiss Electronic Stock Exchange, developing control systems for electrical power plants throughout the world, and merging the technologies and data systems of large financial institutions. She speaks and writes on topics of collaborative leadership and business ethics and is currently working on a book focusing on collaborative leadership. Her education includes a master's degree in computer science, three years of graduate studies in theoretical physics, and a bachelor's degree in mathematics. Ms. Pixton cofounded the Agile Project Leadership Network (APLN) and serves as the secretary on that board. She chaired the Agile 2006 Leadership Summit, *and at* Agile 2005 *she presented a tutorial and workshop on collaborative leadership. For more information, see www.evolutionarysystems.net and www.collaborative-leadership.com.*

Jenni Dow is an experienced executive coach specializing in communications. She works with leaders to help them overcome the internal and external barriers to accomplish business objectives and improve corporate tone. During the past 20 years, Ms. Dow has coached leaders to hone their communications skills, opening the way for both upward and outward collaboration and effectively leading their teams to success. She is a partner at Accelinnova and President of Dow Marketing Communications, Inc. She can be reached at jdow @accelinnova.com.

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Cutter Consortium
37 Broadway, Suite 1
Arlington, MA 02474-5552, USA

Tel: +1 781 648 8700
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