



Collaborating Up, Down, & Across

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- Attend 90% of the session
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The Work World is a Social System



Collaborating Up, Down, & Across Helps You Succeed



**“Collaborating Up, Down,
& Across”** means
consciously working with
others to obtain the best
possible results for **you,**
your boss, your colleagues,
and the **organization.**

This is *NOT* Managing Up



Managing Relationships Matters

Your colleagues matter

...

Your career matters

...

We can't control others



The Truth About Leading Others

- Managing others is hard!
- Poor managers remain top cause of employee unhappiness & turnover
- Organizations often promote based on technical skills
- Most managers don't get training
- Not all managers want to manage
- Few managers were ready for remote/hybrid management!



The True Costs of a Bad Boss

75% of U.S. workers **say** their boss is the worst part of their job



Bad bosses cost the world economy an estimated **\$360 billion** in productivity

Workers with bad managers are **60%** more likely to suffer heart trauma



A Spectrum of Experience






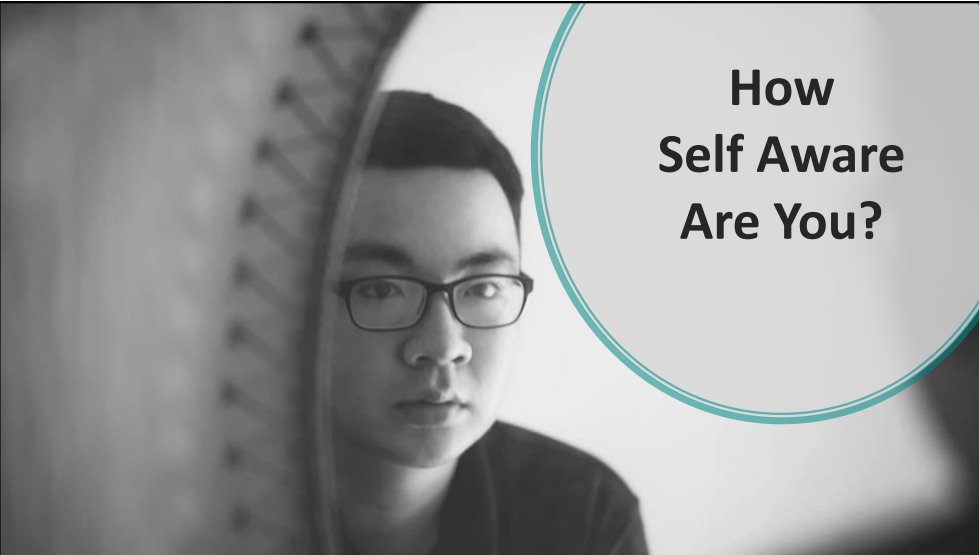


Table Chat

What behaviors do you find difficult to navigate?



INTENT VS. IMPACT



How Self Aware Are You?

Relationship Management Essentials

1. Learn others' **work styles, preferences, priorities, and pet peeves...**
2. **Understand your own** preferences, priorities, strengths, and weaknesses
3. Assess the **gap** and choose how you are willing to **adapt**



Piecing Together the Person Puzzle

● Communication Preferences

How do they prefer to communicate? Are they introvert or extrovert? In person or virtual?

● Workstyle

Collaborative or independent? Cautious or innovative? Detail or big picture?

● Time Orientation & Pace

Patient vs. Impatient? Fast vs. moderate? Time oriented or task oriented?



● Task or Relationship?

Task first or people first? Engaging or reserved?

● Goals & Motivations

What motivates your manager? What are their goals? What do they prioritize?

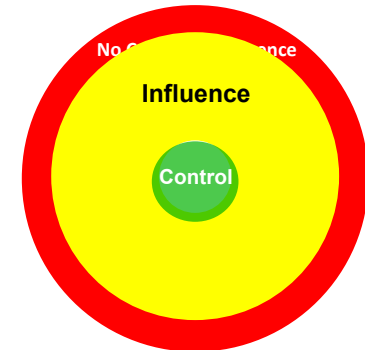
● Concerns & Climate

What does your boss or client worry about? What does their boss worry about? What cultural differences exist?



Adaptability Increases Your Influence

Adaptive and skillful **choices** increase your positive impact & influence




The Platinum Rule

Treat others *as **they*** want to be treated.



Personality & Style Matters

Understanding your personality and work style can help you succeed!



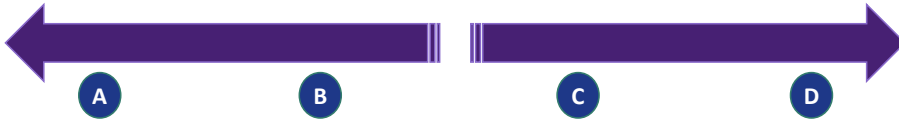
Personality & Work Style

- Personality is our operating system
- Collection of preferred traits and behaviors
- Nobody is 100% of anything
- We tend to have a prevailing style
- All styles are valuable
- Understanding yourself is a first step to becoming more effective
- Learning to navigate other styles helps build more effective relationships

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Assertiveness & Pace

LOWER	HIGHER
Moderate paced	Fast paced
More patient with pace of others	More impatient with pace of others
Less direct in communication	More direct in communication
Less assertive	More assertive
More cautious, less venturesome	More risk-tolerant




Where is your comfort zone?

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The People Task Continuum

People

More open
More responsive
More team-oriented
Warm & Inviting
People first—then task



1 ↑


2 ↑

3 ↓

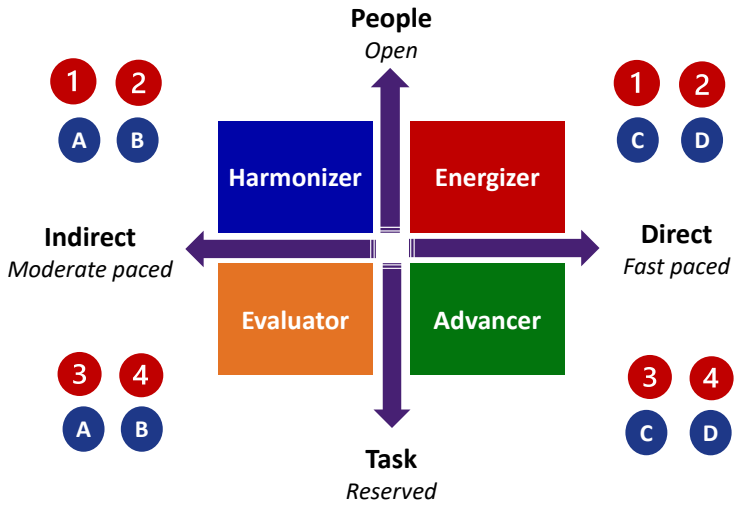
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Task

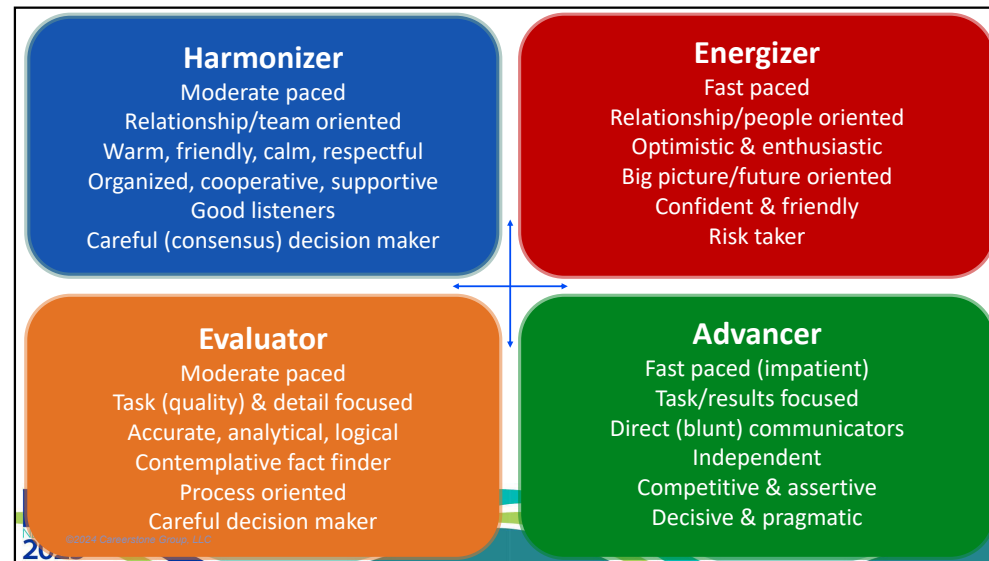
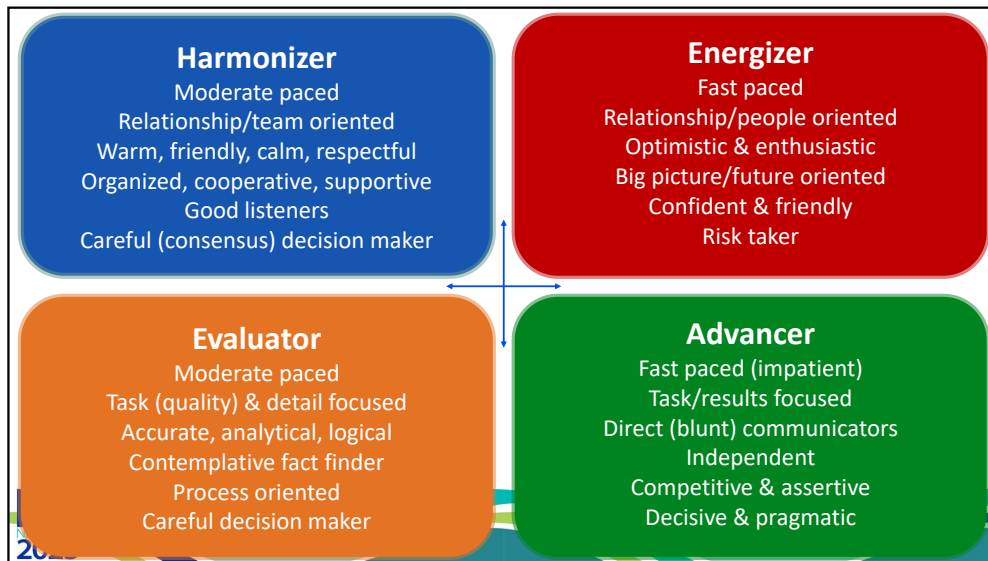
More reserved
Less responsive
More independent
Skeptical
Task first—then people



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The Energizer

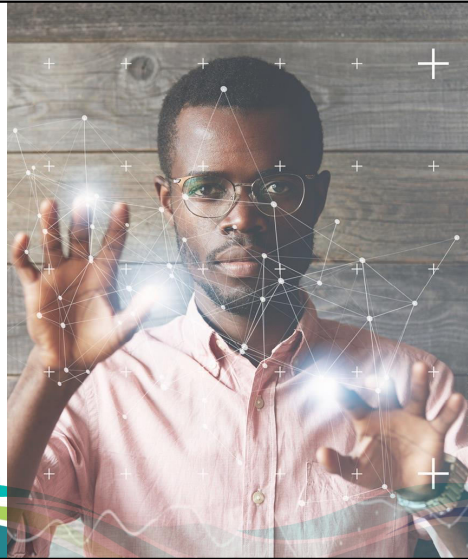
- Fast-paced, relationship-oriented
- Motivating, enthusiastic, confident
- Influential, persuasive, charming
- Big picture / future oriented
- Values relationships
- Coalition builder
- Promotes team spirit
- Risk taker
- Loves starting new projects
- Dramatic, emotional
- Leads from heart

The Advancer

- Fast-paced, task-oriented
- Results, action-oriented
- Direct (blunt) communicator
- Less concern about relationships
- Doesn't share feelings
- Competitive, assertive
- Independent
- Willing to take risks
- Seen as dominating
- Decisive & pragmatic
- Leads from head

The Evaluator

- Moderately paced, task-focused
- Efficient perfectionist
- Accurate, analytical, logical
- Contemplative
- Disciplined, fact finder
- Slow and cautious
- Follow directions
- Often works well alone
- Rational, detail oriented
- Leads from head



The Harmonizer

- Moderate pace, people- focused
- Warm, friendly, calm
- Team oriented
- Organized and often specialized
- Good listener, shares feelings
- Cooperative, supportive, loyal
- Patient, stable, consistent
- Consensus decision making
- Respects hierarchy
- Leads from heart



Navigating Differences

- ✓ How does your style contribute to workplace success?
- ✓ How might your style be misunderstood?
- ✓ What styles might annoy you?
- ✓ How can others work better with you?
- ✓ Theme song?



Communicating With Energizers

- Speed Up!
- Be social and friendly—build the relationship
- Display optimism/positivity
- Listen to them talk about their ideas
- Help them translate talk into action
- Don't spend time on details
- Recap conversations
- Keep them in the loop
- Recognize accomplishments
- **Motto: HAVE FUN DOING IT!**



Communicating With Advancers

- Speed up!
- Be quick, focused, to the point
- Don't take directness personally
- Focus on facts/ideas rather than people
- Have evidence to support differing views
- Talk about how problems will hinder accomplishments (and bring solutions)
- "What" not "How"
- Get stuff done!
- Be clear about authority & decision making
- **Motto: "Get It Done"**



Communicating With Evaluators

- Slow down
- Avoid surprises
- Be prepared, don't ad-lib with them
- Provide adequate information
- Be logical, accurate, and use clear data
- Learn/honor processes/protocols
- Be specific in disagreements and focus on facts
- Be patient, persistent and diplomatic (keep drama down)
- Quality over speed
- **Motto: DO IT RIGHT THE FIRST TIME**



Communicating With Harmonizers

- Slow down
- Build relationship
- Be a team player
- Avoid behavior that may seem overly aggressive or individualistic
- Pay attention to tone and word choice
- Be honest, sincere, and supportive
- Avoid hurry and pressure
- Recognize/appreciate their achievements
- Honor the hierarchy
- **Motto: DO IT TOGETHER**



Harmonizer Growth Areas

- Hold people accountable
- Speed up decision making
- Take a stand, take initiative
- Get comfortable with change
- Let go of making everyone happy

Energizer Growth Areas

- Stay focused
- Get organized
- Appreciate data
- Take it down a notch
- Keep emotions in check

Evaluator Growth Areas

- Build relationships and engage
- Beware of analysis paralysis
- Get comfortable with risk
- Lighten up!
- Color outside the lines

Advancer Growth Areas

- Ask don't tell
- Take time to listen
- Beware of autocratic tendencies
- Let others win once in a while
- Consider your impact!

Identify Your Key Relationships



Difficult Dynamics



Employees Hate...

- Micromanaging
- Ghosting
- Impulsivity
- Incompetence
- Inconsistency
- Seagulling
- Credit Stealing
- Back Channeling
- Favoritism
- Passive Aggressive
- Michael Scott Syndrome



Difficult Behaviors



Ghosting

Micromanaging

Impulsiveness

WHICH WOULD BE **HARDEST** FOR YOU?

- Micromanager
- Ghost
- Impulsive



Which Ones Have **You** Done?

- Micromanager
- Ghost
- Impulsive



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Strategies: Micromanager

- ✓ Don't take it personally
- ✓ Offer regular updates and status reports proactively!
- ✓ Over communicate!
- ✓ Anticipate their involvement—understand their priorities and needs
- ✓ Remember: Information, Inclusion & Control!



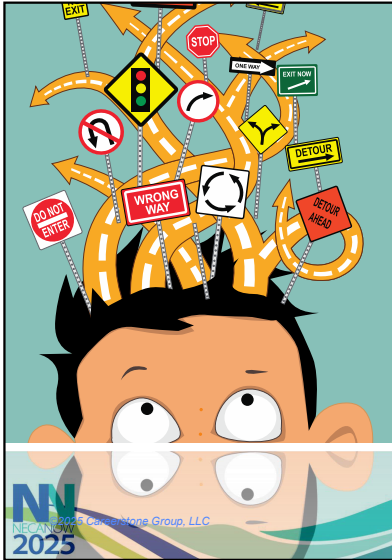
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Strategies: The Ghost



- ✓ Don't take it personally
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Strategies: The Impulsive

- ✓ Embrace what change you can
- ✓ Use the “yes, and...”
- ✓ Provide project lists
- ✓ Offer pros and cons on new idea
- ✓ Ask leader to prioritize new projects against current ones
- ✓ Stay positive
- ✓ Hedge your bets

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How to Avoid Being That Annoying Boss

- ✓ Self-awareness (know your impact)
- ✓ Seek feedback
- ✓ Transparency (explain the “why”)
- ✓ Authenticity
- ✓ Be clear about your needs, wants, and expectations
- ✓ Use clear delegation principles
- ✓ Apologize (when appropriate)



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Sharing Our Strategies

- ✓ What kinds of boss behaviors do you have to navigate?
- ✓ What strategies do you use to manage up?
- ✓ What new strategies might you try?


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Be a People Detective!

- Watch, observe and notice preferences and style of others
- Build out key relationships
- Adapt, adapt, adapt! (Don't resist what is 😊)
- Have the conversation...

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Have the Conversation!

- ✓ What are your preferences?
- ✓ What are your priorities?
- ✓ What are your pet peeves?
- ✓ What can I do more of, less of, or differently to work well with you?

Questions to Ask & Answer


What is your preferred mode of communication?	How often do you want to meet as a team and on a one-to-one basis?	What does success look like to you?	How often do you like to be kept updated on projects? How do you like your updates?	What level of detail do you like to have?
What are your top priorities? What is highest priority to you?	What are lower priority items?	What are your goals for the team? The organization? For you?	What are your in-person expectations?	What are the biggest pressures on this team/you/department?
What are your biggest concerns right now?	What are your pet peeves?	What can I help with? How can I be of the most service to you?	What can I do more of? Less of? Or differently to work well with you?	

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Create a Team SOP

Best way to communicate with me <ul style="list-style-type: none"> • X • X • X 	The way I like to receive feedback <ul style="list-style-type: none"> • X • X • X 	Things I need <ul style="list-style-type: none"> • X • X • X 	Things I struggle with <ul style="list-style-type: none"> • X • X • X
Hot Buttons <ul style="list-style-type: none"> • X • X • X 	Things I love <ul style="list-style-type: none"> • X • X • X 	Expect from me <ul style="list-style-type: none"> • X • X • X 	Other things to know about me <ul style="list-style-type: none"> • X • X • X

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Final Tip:

If you are a boss—help your team manage up to you!

Manage Your Relationships to Manage Your Workplace Experience!



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