

MANAGING UP: DYNAMIC FOLLOWING IN AN ORGANIZATIONAL SETTING

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Great organizations rely not only on dynamic leaders but also on “dynamic followers.” Often the greatest challenge to effective leadership is in the direct line reporting relationship with a manager or supervisor. Being able to effectively “manage up” may be the most important skill set that one possesses or can acquire to ensure success in any organizational setting. The skill set required to do so may be very different than that necessary to effectively manage direct reports. Managing up is the process of consciously working with a supervisor to obtain the best possible results for you, your supervisor and your organization. This is not about political maneuvering or sycophantic behavior. Rather, it is a deliberate effort to bring understanding and cooperation to a relationship between individuals who often have very different perspectives.

An alternate title to this article could be, “How Executive Coaching Saved My Job.” This article briefly recounts the author’s own difficulties in acclimating to a large corporate environment. Soon after assuming a medical director position at a pharmaceutical company six years ago, I experienced significant challenges in the relationship with my boss. Because I was unable to resolve our conflicts by myself I took advantage of my company’s offer to make use of a personal executive coach over a one-year period. The result of this undertaking was a highly successful outcome which included developing an effective and productive work relationship with my boss and being rapidly promoted within my group. I believe this would not have occurred in the absence of my coaching experience.

A Market for Coaches

There has been a virtual explosion in the executive and organizational coaching market over the past several years. The very nature of corporate life is a complex, fast-paced and often pressured environment where executives and senior managers may derive enormous value from personalized, skilled help delivered in a structured and safe one-on-one situation. Skilled executive coaching can offer this. While there are no regulatory agencies which oversee the licensing and professional conduct of “coaches,” the numbers have rapidly increased. The breadth of backgrounds from which they come has also expanded enormously. Retiring executives, HR directors, academics and management trainers have been joined by engineers,

senior police officers, teachers, clinical and occupational psychologists, counselors and psychotherapists. My coach (recommended by my company’s HR Department) was a Stanford-trained clinical social worker with a business degree who had extensive experience working with many different types of organizations. This article will not focus on the various types of coaches and coaching that are currently available, but rather will offer a brief overview of my personal experience and how I conceptualized the coaching process.

Managing Up

Before turning to my coaching experience, there are some fundamental concepts essential for effectively “managing up.” In order to manage effectively, one must first be able to manage oneself. This involves various capabilities, from self-awareness (how one’s personal style affects others, and the ability to make adjustments); receptivity to constructive criticism (and the ability to respond positively and effectively); the ability to develop and maintain positive work relationships; and projecting an image of trust, fairness and reliability. Many of these capabilities fall into what are now commonly referred to as “soft skills.” Business schools and organizations are paying increasing attention to topics such as teamwork, leadership, and communication in recognition that these traits are necessary for success in the corporate suite.

Managing a supervisor involves understanding his or her management style. This includes assessing the emotional, cognitive, and personal style (including idiosyncrasies, quirks and pet peeves) of your boss. It is important to understand where your boss fits into the organizational structure and how decisions get made that impact you. Subordinates must ascertain their supervisor’s own goals, and determine where the points of intersection with their own lay. This concept of alignment of one’s own professional goals with those of your boss and with the organization’s strategic plan is arguably the most critical factor for success. Developing a personal “action plan” that is aligned with your organization’s strategic plan can be enormously helpful.

Conflict in any relationship is inevitable, and conflict per se is not necessarily a signpost for trouble. However, the capacity to manage conflict is essential for managing, either up or down. It is important when trust erodes in a

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relationship with your supervisor to “diagnose” and to act quickly. This can present a very stressful scenario. It is important to maintain one’s own composure and to manage strong emotions. Understanding the nature and source of conflict requires active listening and considering that the presenting problems may run deeper. In this situation openly acknowledging the existence of conflict and trying to set up regular meetings with your boss may result in resolution. However, if conflict with a boss persists or escalates, outside help may be necessary because of the dire consequences of ignoring it.

A not uncommon phenomenon in corporate settings, and one which I encountered, is a supervisor who is threatened by a subordinate’s superior competencies and/or has immediate and powerful personality clashes resulting in seemingly irresolvable conflict. This can present a vexing scenario resulting in considerable anxiety and stress, and may place one’s career and/or career advancement in jeopardy. It almost ended for me what would have been a very short-lived career in the pharmaceutical industry. Supervisors have the power to prevent personal and professional advancement in a corporate structure. They can overtly and covertly subvert and contaminate relationships with teammates and with other internal stakeholders. They can assign high profile projects and initiatives to other team members, thereby limiting one’s visibility and influence. They can employ tactics such as ultra micromanagement and focus on minor performance issues to the extent that significant performance successes are overlooked or devalued. They also rate your annual performance and determine important things like raises, bonuses, and other perquisites. This author, faced with escalating conflict and many sleepless nights, sought help in executive coaching, but not without considerable skepticism and trepidation.

Overcoming Blind Spots

I would like to briefly share my experience with the coaching process. I believe that in my case the ultimate goal of this endeavor was to “learn to observe the observer that you are.” The process involves challenging “blind spots” about self-perception. You become powerfully aware of how you are perceived by others and how you interact with the world. More importantly, you are able to develop the power and leverage to change and to take action with a new “world view.” I must mention that although there are many similarities, working with a coach is not the same as psychotherapy. Despite much skepticism about the potential for coaching to help my situation I was willing to give it a try.

The Initial Phase of Coaching: “Assessing Reality”

I would characterize my work with a coach over the course of a year as having four overlapping phases. I would call the first phase, “Assessing Reality.” The initial work consisted a several hour face-to-face meeting to describe my current work situation and also to review my work history. There were many probing questions about how I perceived the difficulties with my boss. Popular corporate techniques now routinely include personality assessments and peer feedback. The use of tools such as 360-degree assessments from direct reports, team members and supervisors (current and past) can provide invaluable feedback as well as provide a baseline for measuring improvement. I filled out an emotional intelligence inventory; it took about an hour. More importantly my coach interviewed by phone co-workers, direct reports, and supervisors (past and present, including my current boss). I was encouraged to select individuals with whom I perceived both positive and less than positive relationships. I spoke with or sent notes to all of them asking for their help in participating in this process. Some also filled out a survey, the Hay Group ECI (emotional competence inventory). My coach then reviewed my own self-perceptions with the perceptions of me described by others. The results were shocking—there were significant discrepancies between how I viewed myself and how others perceived me. Although it was a bitter pill to swallow, being confronted with this “reality” motivated me highly to commit to the coaching process.

Emotional Intelligence

Let me interject a few comments about “emotional intelligence” (EQ). This term has become hugely popular and has invaded the corporate landscape. It encompasses the area of “soft skills” referenced above. It describes abilities distinct from, but complementary to, cognitive intelligence - those capacities typically measured by IQ. Simply stated, the idea about EQ is that it is the ability to understand your own emotions and those of others, and being able to use this information to bring about the best outcome for all concerned; knowing where emotions come from and being able to manage your own and those of others; knowing what emotions mean and what information they are providing; being able to work well with others as well as alone, and being able to combine cognitive knowledge with emotional knowledge and use them in tandem. Cognitive intelligence involves abilities such as logic, reason, reading, writing, analyzing and prioritizing. Research in this area suggests that one’s IQ is fixed and

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static; however, emotional intelligence can be developed and improved throughout life. There is a mounting body of evidence that the higher one goes in an organization, the more important EQ can be. For those in leadership positions, emotional intelligence skills account for close to 90 percent of what distinguishes outstanding leaders from those judged as average.

The Second Phase: Agreeing on Goals

I would characterize the second phase of coaching as "Agreeing on Goals." It involves clearly defining what you hope to accomplish in your work with your coach. It might be as simple as wanting to keep your job. But other goals can be outlined such as increasing your visibility and influence in the organization, improving work-life balance, or achieving promotion and career advancement. In my case, I simply wanted to reduce the level of conflict that was present, and to develop an effective, productive relationship with my boss. I was largely successful in achieving this goal, and in the process many other positive results materialized.

The Third Phase: "A Plan for Action"

The third phase is developing a "Plan of Action." This involves a commitment to an ongoing framework for working with your coach. In my case I had weekly telephone sessions of one hour in length. We worked on ways in which I could become more aware of my own "blind spots." The focus of the work was on behavior, not on feelings; what I would do and how I would do it in various real scenarios. In particular, efforts were concentrated on ways in which I could align my goals with those of my boss. I would be given regular "homework assignments," mostly focused on my interactions with my boss, and with my coach's support we would review the results and make adjustments as necessary. In the process my coach became my trusted confidante, my advocate, and more importantly, a source of objective feedback. Over the course of the year I would meet with my coach for face-to-face meetings of 2-3 hours in length on a quarterly basis. This was important to review progress and to drill down on persistent difficulties. As the year of working together came to a close, select co-workers agreed to complete another survey.

The Fourth Phase: "Reinvent Yourself"

I would characterize the final phase as "Reinventing Yourself." This involves being able to change your own "world view." I found this to be a gradual process. Under stress one tends to revert back to old behaviors and

perceptions. Ultimately I found myself able to take action with a "new story" about myself and about others. Internally this involved a different and more realistic quality of self-perception. Externally it led to more effective behavior in the work setting. At the end of the year, a final face-to-face meeting with my coach was held, and at my request I invited my boss to join us, to discuss his perceptions about our current work relationship and to compare my final 360-degree evaluation with the initial one. This was an invaluable experience, both for me and for my boss, and helped to solidify the enormous gains in trust and respect that strengthened over the year.

Conclusion: "Fold 'Em" or Stand Pat

In some instances, even with one's best efforts, attempts to manage up are unworkable. There are times when it is probably best to "fold 'em" and to move on. Leaving one's job and an organization can be scary, but it can also lead to tremendous opportunities for success. There are several tell-tale signs of when one should consider leaving a job: when your personal action plan deviates from the organization's strategic plan; when it is impossible to align your goals with those of your boss; when you find that you are no longer learning in your job; and finally, when you dread going to work every day. Not every story has a happy ending like mine. I was very fortunate to work at a company that valued and offered executive coaching to its employees. I was also lucky to work with a great coach. I believe that a "good fit" with a coach is as crucial to success in a coaching relationship as it is with a mental health practitioner in a therapeutic relationship. For me, the most revelatory aspect of my coaching experience was to realize that managing up is a skill that can be learned.

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