



Leadership

Managing Up: Proactive Conversations

LINKED COMPETENCIES: Use strategic thinking strategies to achieve desired results,

Negotiation is a vital skill for “managing up” effectively. By understanding and using negotiation techniques, you can better communicate with your superiors, advocate for your needs, and contribute to a more efficient and harmonious working environment.

Outcomes

- Students will practice strategies for initiating conversations to advocate for your needs for mutual benefit.

Use strategic thinking strategies to achieve desired results			
Indicate with an ✓ on the line below, where you currently have evidence.			
Exploring			Implementing
I understand the significance of aligning individual goals with organizational objectives for personal, professional, and organizational success.	I consistently assess my personal and professional long-term goals, potential obstacles, and various options for success.	I consistently prepare myself to respond to potential challenges or changes in structures that may impact future success.	Through my preparedness and flexibility, I have demonstrated competence in making informed decisions and adapt to changing circumstances to maintain attainment of desired results.

Remind your students to reflect, add, and annotate evidence of competency to their portfolios.

- **Reflect** on their experiences and what they learned through the activities and feedback.
- **Add** evidence of competency to their portfolios.
- **Annotate** the evidence to highlight their specific competency.



TIME:

One 55-minute session.

Materials:

- Website [Managing Up: Being Active](#)
- Negotiation Scenarios
- Handout: Strategies for Negotiating Needs with a Supervisor

Background:

To foster a working relationship with a boss or supervisor it is important to communicate your needs effectively to ensure a positive work environment where both parties feel heard, respected, and satisfied. Advocating for one's needs shouldn't be done as a "knee jerk reaction" to feeling overwhelmed, nor should it be something that catches a supervisor by surprise. Negotiating needs with a supervisor effectively requires tact, empathy, and assertiveness.

Review and provide students with the handout '[Strategies for Negotiating Needs with a Supervisor](#)' or ask them to review the website [Managing Up: Being Active](#).

Activity #1:

Once you have reviewed strategies for negotiating needs with a supervisor, have students work in teams to analyze a case study for what could have been done for more effective communication and negotiating a mutually beneficial solution.

Two sample case studies have been provided.

- [Case study #1](#)
- [Case study #2](#)
- Generative AI (e.g., ChatGPT) tools are helpful to create additional case studies tailored to your department.

Ask for volunteers to share some strategies to improve the outcome of the case study.

Activity #2:

In the same groups, provide students with a scenario when they will need to determine how to effectively communicate with their supervisor about their needs. Sample scenarios are included below.

- **Scenario A:** The 'employee' needs flexibility in their work schedule due to personal commitments.
- **Scenario B:** The 'employee' feels that they have too many tasks and is feeling overwhelmed and needs to discuss workload distribution.
- **Scenario C:** The 'employee' is seeking a promotion or raise and needs to convince the 'supervisor' of their deservedness.
- **Scenario D:** The 'employee' needs constructive feedback on their recent work to improve and progress.
- **Scenario E:** The 'employee' would like to propose a new project idea that would require additional resources.



Reflection and Summary:

Ask students to reflect on what they learned about managing up through this activity.

- How might they adjust their approach in the future?
- How might they communicate in an interview how their ability to support positive relationships with their supervisor is an asset to the organization and how it demonstrates their leadership qualities?

Remember, managing up is not about manipulation or personal gain, but about building a constructive, mutual relationship that promotes productivity, understanding, and workplace satisfaction.



Optional Case Study #1 (Generated by ChatGPT)

Case Study: Negotiating Needs at TechCo

Background: TechCo is a fast-growing tech company specializing in artificial intelligence. John is a software engineer who has been with the company for two years. He has a proven track record, contributing to several successful projects and maintaining excellent performance reviews.

John recently became a father. To accommodate his new family responsibilities, he needed to modify his working hours, aiming to start and finish work earlier than his current schedule.

The Scenario: John prepared a proposal outlining his desired schedule change, explaining his situation, and showing how he would still meet his responsibilities without impacting the team. He requested a meeting with his direct supervisor, Sarah, to discuss the proposal.

During the meeting, John quickly presented his proposal, expecting Sarah to understand his situation and approve the request immediately. He was taken aback when Sarah expressed concern over how the team might perceive the shift and worry about setting a precedent. She told John she needed time to consider his request.

A week later, Sarah informed John that she couldn't approve his request due to concerns over team morale and equality. She also mentioned that she felt rushed during their initial meeting, which did not allow for a detailed discussion of alternatives.

Outcome: John felt frustrated and unheard, believing that his needs were not considered. He started looking for job opportunities with companies offering more flexible hours.

Task: Analyze this scenario considering the strategies and approaches John used to negotiate his needs with his supervisor. Discuss what went wrong in the negotiation process and suggest improvements John could have made. What actions could Sarah have taken to handle the situation differently?



Optional Case Study #2 (Generated by ChatGPT)

Case Study: The Failed Negotiation

Background: John, an experienced marketing manager at XYZ Corporation, had been feeling overwhelmed with his increasing workload due to a recent company expansion. The expanding client portfolio and the reduced staff due to budget cuts exacerbated his stress. John had been working long hours and on weekends to keep up with the workload, affecting his personal life and health.

Scenario: Believing he could resolve the issue, John decided to approach his boss, Linda, the marketing director, to negotiate his workload. Linda was known for her assertive style of leadership and focus on results. John, feeling frustrated and desperate for change, approached Linda about his workload during a team meeting, citing the unrealistic expectations and his declining health.

He said, "Linda, this workload is impossible, and my health is deteriorating because of it. I need you to do something about it."

Outcome: Linda, taken aback by John's abrupt and public approach, became defensive. She responded, "John, we are all working hard. If you cannot handle the pressure, maybe this job isn't for you." The meeting ended in an awkward silence, and John's issue remained unresolved.

Task:

- Analyze the negotiation tactics John used in this situation. What went wrong?
- How could John have used different negotiation strategies to improve the conversation's outcome?
- What role did Linda's leadership style play in this situation? How could she have handled it better?
- How would you approach this situation if you were John? Draft a plan including the steps you would take.
- How can leaders create an environment that encourages employees to express their needs and negotiate effectively?



Negotiating Needs with a Supervisor

Negotiating needs with a supervisor effectively requires tact, empathy, and assertiveness. Here are some strategies to consider:

Prepare in Advance: Understand your needs clearly and the reasons behind them. Research or consider the possible outcomes and be ready with a Plan B.

Choose the Right Time: Timing is crucial. Choose a moment when your supervisor is likely to be most receptive. This might be during a scheduled one-on-one meeting, or at a time when they are not overly busy or stressed.

Empathize: Understand your supervisor's perspective and constraints. Show that you value their time and perspective. This can help them be more open to your needs.

Be Clear and Specific: Clearly articulate what you need, why you need it, and how it could also benefit your team or organization. The more concrete your request, the easier it is for your supervisor to understand and consider.

Use "I" Statements: Frame your needs from your perspective to avoid sounding accusatory or confrontational. For example, say "I feel overwhelmed with my current workload and would appreciate discussing possible solutions" rather than "You're giving me too much work."

Be Open to Feedback and Compromise: Your supervisor may not agree fully with your proposed solution, and that's okay. Be open to their feedback and willing to reach a compromise that works for both parties.

Follow Up in Writing: After your conversation, send a follow-up email outlining what was discussed and agreed upon. This can help ensure there's no confusion and that both parties are on the same page.