

Influencing Up

You make a difference.



by Marshall Goldsmith

ORGANIZATIONS SUFFER when key people can't effectively influence up. Most people are occupied with *efforts* rather than *results*. They worry over what the organization or their boss owes them and should do for them and obsess over the authority they "should have," thus rendering themselves ineffectual.

Although knowledge workers may know more about what they are doing than their managers do and have years of education and experience, they rarely know how to effectively influence up. Even the greatest wisdom and knowledge not applied to action and behavior is meaningless.

To influence upper management and convert good ideas into meaningful action, follow these 10 guidelines:

1. When presenting ideas, realize that it is your responsibility to sell—not their responsibility to buy. Influencing up is similar to selling products or services to customers. They don't have to buy—you have to sell! Great salespeople take responsibility for achieving results, refusing to blame their customers for not buying their products. Most professionals blame management for not buying their ideas; hence, upward feedback often turns into "upward buck-passing." You become disempowered when you focus on what *others* have done to make things wrong—not what *you* can do to make things right. By developing your ability to present ideas, and not blaming management for not buying your ideas, you accomplish much more. The knowledge worker is expected to take responsibility for being understood. It is arrogance to assume that laymen can or should make the effort to understand the specialist. The effective upward influencer needs to be a good teacher. Good teachers realize the *communicating* knowledge is often a greater challenge than *possessing* knowledge.

2. Focus on contribution to the larger good—not just the achievement of your objectives. An effective salesperson would never say to a customer, "You need to buy this product,

because if you don't, I won't achieve my objectives!" They relate to the needs of the buyers, not to their own needs. Similarly, effective upward influencers relate to the larger needs of the organization, not just to the needs of their unit or team. When influencing up, focus on the impact of the decision on the organization. In most cases, the needs of the unit and the needs of the corporation are directly connected. In some cases they are not. Don't assume that executives can automatically "make the connection" between the benefit to your unit and the benefit to the larger corporation.

3. Strive to win the big battles and don't waste your energy and "psychological capital" on trivial points. Leader's time is limited. Don't waste time on issues that will only have a negligible impact on results—focus on issues that will make a real difference. Be willing to "lose" on small points. Be sensitive to the need to win trivial non-business arguments on things like restaurants, sports teams or cars. People become more annoyed with you for having to be "right" on trivia than your need to be right on important business points. You are paid to do what makes a difference and to win on important issues.

4. Present a realistic cost-benefit analysis of your ideas—don't just sell benefits. Every organization has limited resources, time, and energy. The acceptance of your idea may well mean the rejection of another idea that someone else believes is wonderful. Be prepared to have a realistic discussion of the costs of your idea. Acknowledge that something else may have to be sacrificed to implement your idea. When you prepare for a realistic discussion of costs, you can "prepare for objections" to your idea, acknowledge the sacrifice that someone else may have to make, and point out how the benefits of your plan outweigh the costs.

5. Challenge up on issues involving ethics or integrity—never remain silent on ethics violations. Enron, WorldCom, and other organizations show how ethics violations—only one violation of corporate integrity—can damage or destroy even the most valuable companies. If your management ever asks you to do anything that violates corporate ethics, refuse to do it and immediately let upper management know of your concerns. Such action ultimately benefits your company, your customers,

your co-worker and yourself. When challenging up, try not to assume that management has intentionally requested you to do something wrong. In some cases, inappropriate requests may be made because of misunderstandings or poor communication. Try to present your case in a manner that is intended to be helpful, not judgmental.

6. Realize that your managers are just as human as you are—don't say, "I am amazed that someone at this level..." It is realistic to expect upper managers to be competent; it is unrealistic to expect them to be superhuman. Is there anything in human history that indicates when people achieve high levels of status, power and money, they become completely wise and logical? How often do you think, "I would assume someone at this level..." followed by "should



know what is happening", "should be more logical", "wouldn't make that mistake", or "would never engage in such inappropriate behavior." Even the best of leaders are human. We all make mistakes. When your managers make mistakes, focus more on *helping* them than *judging* them.

7. Treat managers with the same courtesy that you would treat partners or customers. While you must avoid "kissing up" to upper management, you also must avoid the opposite reaction. Many managers spend hours "trashing" the company and its executives or making destructive comments about other co-workers. Before speaking, ask four questions: Will this comment help our company? Will this comment help our customers? Will this comment help the person that I am talking to? Will this comment help the person that I am talking about? If the answers are no, don't say it! There is a big difference between total honesty and dysfunctional disclosure. It's vital to "challenge up" on integrity issues. It is often inappropriate to "trash down" when making personal attacks.

8. Support the final decision of the team—don't say, "They made me tell you" to direct reports. Assuming that the final decision of the team is not immoral, illegal, or unethical—go out and try to make it work! Managers who consistently say, "they told me to tell you" to co-workers are seen as "messengers" not leaders. Even worse, don't say, "those fools told me to tell you". By revealing your lack of commitment to the final decision, you may sabotage the chances for effective ex-

cution. When communicating difficult decisions, ask, "How would I want someone to communicate to their people if they were passing down my final decision and they disagreed with me?" Treat your manager in the same way that you would want to be treated if the roles were reversed.

9. Make a positive difference—don't just try to "win" or "be right". You can easily become more focused on what others are doing wrong, than how you can make things better. An important guideline in influencing up is to always remember your goal to make a positive difference for your organization. Corporations are different than academic institutions. In an academic institution the goal may be sharing ideas, not impacting the world. Hours of acrimonious debate can be perfectly acceptable. In a corporation, sharing ideas without having an impact is worse than useless. It is a waste of the stockholders money and a distraction from serving customers. The most common area for improvement for most executives is the compulsion of "winning too much". Focus on making a difference. The more other people can "be right" or "win" with your idea, the more likely your idea is to be successfully executed.

10. Focus on the future—let go of the past. Avoid whining about the past. Have you ever managed someone who incessantly whined about how bad things are? When people consistently whine, they inhibit any chance they have for impacting the future. Their managers view them as annoying, and their direct reports view them as inept. Nobody wins. Successful people love getting ideas aimed at helping them achieve their goals for the future. They dislike being "proven wrong" because of mistakes in the past. By focusing on the future, you can concentrate on what can be achieved tomorrow, as opposed to what was not achieved yesterday. This future orientation will dramatically increase your odds of effectively influencing up and build better long-term relationships.

How much energy have you invested in *acquiring* your knowledge? How much energy have you invested in learning to *present* this knowledge so that you can make a real difference? By learning to influence up, you can make a large, positive difference for the future of your organization! **LE**

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ACTION: Focus more on the future.

Active Leadership

It creates a better future for all.



by Peter Block

MOST LEADERS ARE victims of our inflated expectations.

When people say there's a *lack of leadership*, they're never talking about themselves. So, I see the whole discussion of leadership as an avoidance of personal responsibility.

My interest now is the individual—the millions of people who are *passive, isolated, and entitled*—passive because our structures encourage it, isolated by technology that gets rich off our isolation, and entitled to be taken care of.

We need to confront corporate caretaking and build citizen capacity. Being a social architect gets you out of *helpful interventions*. Architects don't build, they design; they create spaces where other people build. You don't need to be the center of the system. You can do so many useful things without being the star. You can get people to talk together by designing learning events or useful experiences that enable them to explore issues and make decisions. The goal is to build self-sufficiency—to help people to get connected, define purpose, organize themselves, reclaim the power that is rightfully theirs. Now that's a leadership purpose worth pursuing.

The questions authentic leaders raise are ones of purpose, destiny, and vision. Stewardship is about acting on purpose, worrying about the next generation, and stopping the abuse of power.

Leadership (and life) is about the conversation you have with yourself and the people around you. Where you are and how you show up to the world creates a future different from the past. Indeed, this is *Active Leadership*. All learning is the willingness to enter into a new conversation about fresh possibilities.

Today there is greater need for engagement; engagement is the way to progress. And progress means a deeper sense of caring for the earth, belonging, finding a way to offer gifts. Speed, ease and comfort are not progress. Just showing up and doing something faster doesn't mean you add value. You

have to decide whether to occupy the space and be present in the moment. Being *somewhere* doesn't mean you're present. What must happen is to make the participant active—responsible for the outcomes of training and learning.

Being a *citizen* is different than just being a *resident*. It's about deciding to care about the city, not just your neighborhood or backyard.

The key to transformation is to start a different conversation. My question is, "What's the gift that I bring to the world?" Don't worry about the answer—it's the question that matters. Of course, the world doesn't value *questioning*; the world values *doing*. It wants to know, *how* do we do this? We worship the god of efficiency, of productivity. We ask, "How do you make this work? How long does it take? How much does it cost?" We have lost our sense of community and connectedness. We're deeply isolated and lonely. We need to imagine a better life. The act of imagination, of possibility, creates the future, but it must be rooted in community.

Maybe listeners create speakers; citizens create leaders; employees create bosses; students create teachers; and children create parents. The purpose of problem-solving is to build relationships. Yet, we think the purpose of relationships is to solve problems.

You hear people say, "We don't have to like each other to work together." This means, "Screw the relationship, as long as we get the work done."

Thinking that "only the leader matters" or that "the person on top is the cause" is the problem. We need to invert the location of cause. If you treated the employee as the cause, where does that take you as a leader?

To me the qualifying question of transformation is, "Do you want the future to be distinct from the past?"

The idea of *invitation* is powerful. A powerful invitation says, "Please come; and if you choose to come, here's what's required or expected of you: You'll have to show up on time, engage with your peers in powerful conversations, leave your personal interests at the door, and help us create a better future through imagination, from a dream or a possibility." That invitation gives you traction with people. **LE**

Peter Block is a celebrated consultant and author. Visit www.peterblock.com.

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