Managing Up, Down and Across

Nita Singh Kaushal
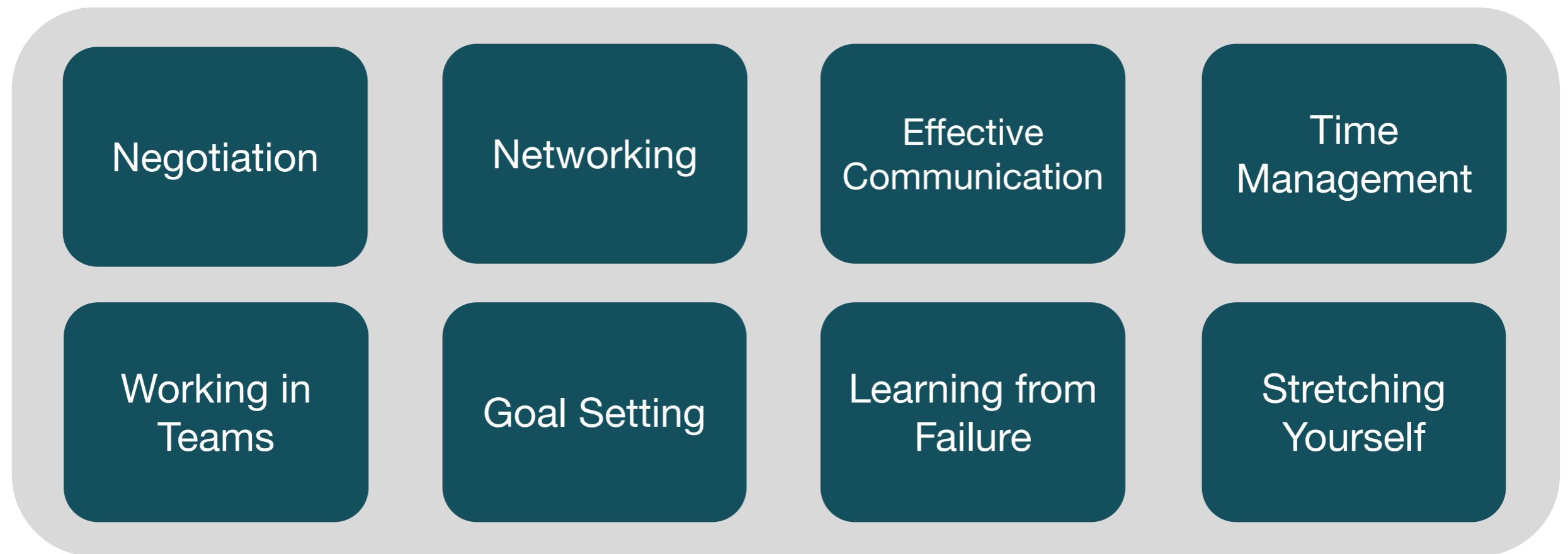
Lecturer, School of Engineering, Stanford University
Founder, NSK Leadership LLC and Miss CEO

@nitakaushal

Leadership toolkit
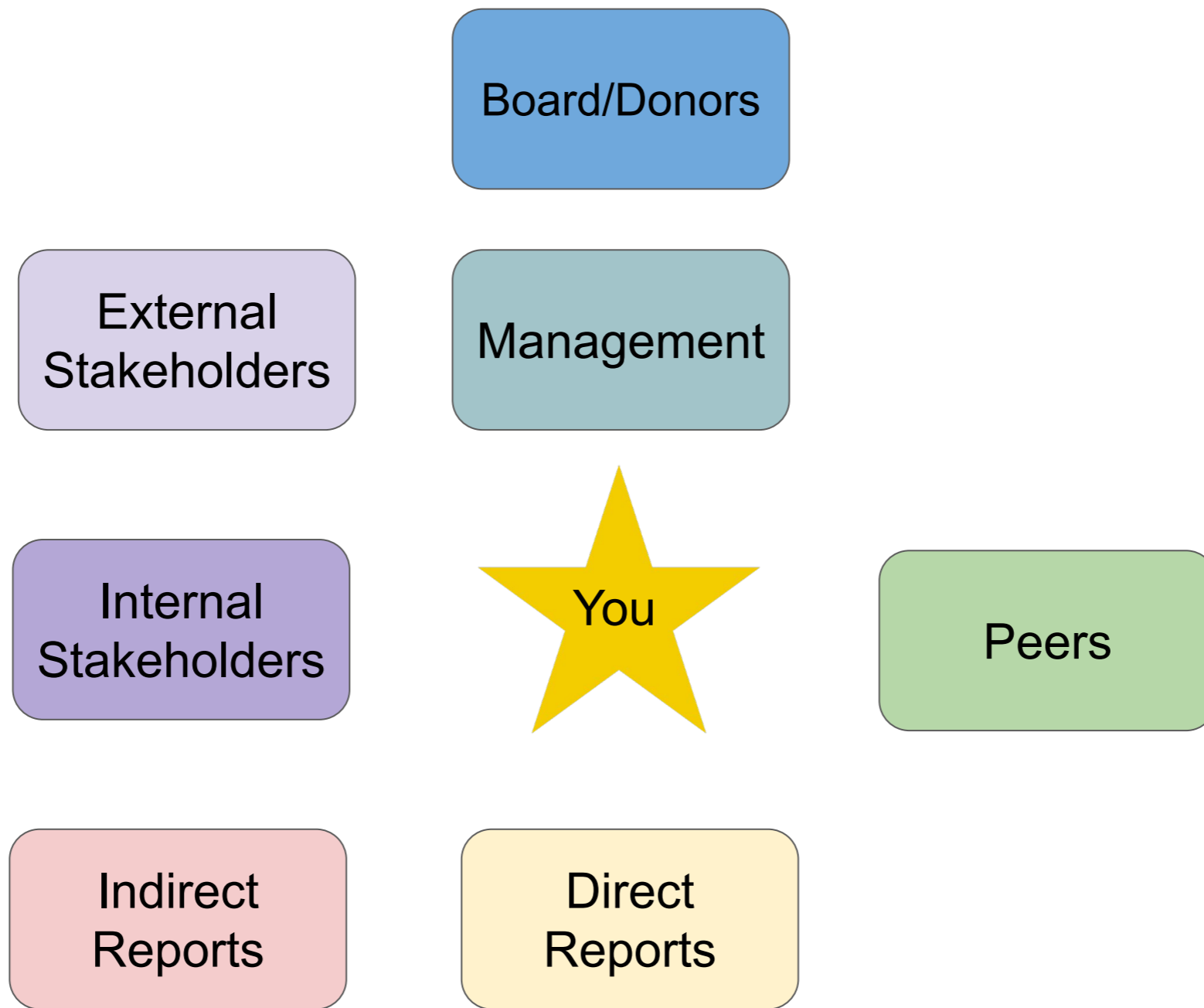
Skills highly correlated with long-term professional success and satisfaction:

Negotiation	Networking	Effective Communication	Time Management
Working in Teams	Goal Setting	Learning from Failure	Stretching Yourself

Board/Donors

Management

External
Stakeholders

Internal
Stakeholders

You

Peers

Indirect
Reports

Direct
Reports

Think **BIG** picture
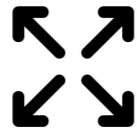
Find the **why**

- Do you understand your organization's goals and objectives?

- What are your team's values and operating principles?

- Vision → hope and engagement

Your organization's goals

	Change size	Change direction	Change position	Change ourselves
Offensive	**Expand** We are **growing** to get to scale	**Reinvent** We are **disrupting** the market	**Dominate** We are **staying ahead** of the market	**Metamorphose** We are **becoming** something new
Defensive	**Contract** We are **conserving** to protect us	**Pivot** We are **adapting** our direction	**Overthrow** We are **overtaking** our rival	**Forge** We are **burning** from a crisis

How does your work map to the big picture?

How are your deliverables aligned with business goals and objectives?

How can you emphasize the strategic issues more?

How are you setting yourself up for wins this week? This year?

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Secure **five new partnerships** and **increase membership by 10%** this year.

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Highlight **relevant success metrics** in 1:1s and meetings

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How are you setting yourself up for wins this week? This year?

This week: Optimize internal process A
This year: Reduce administrative costs by 10% through better use of technology by the end of the year

Look up

Manager 2

Manager 1

External Stakeholders

Internal Stakeholders

You

Peers

Indirect Reports

Direct Reports
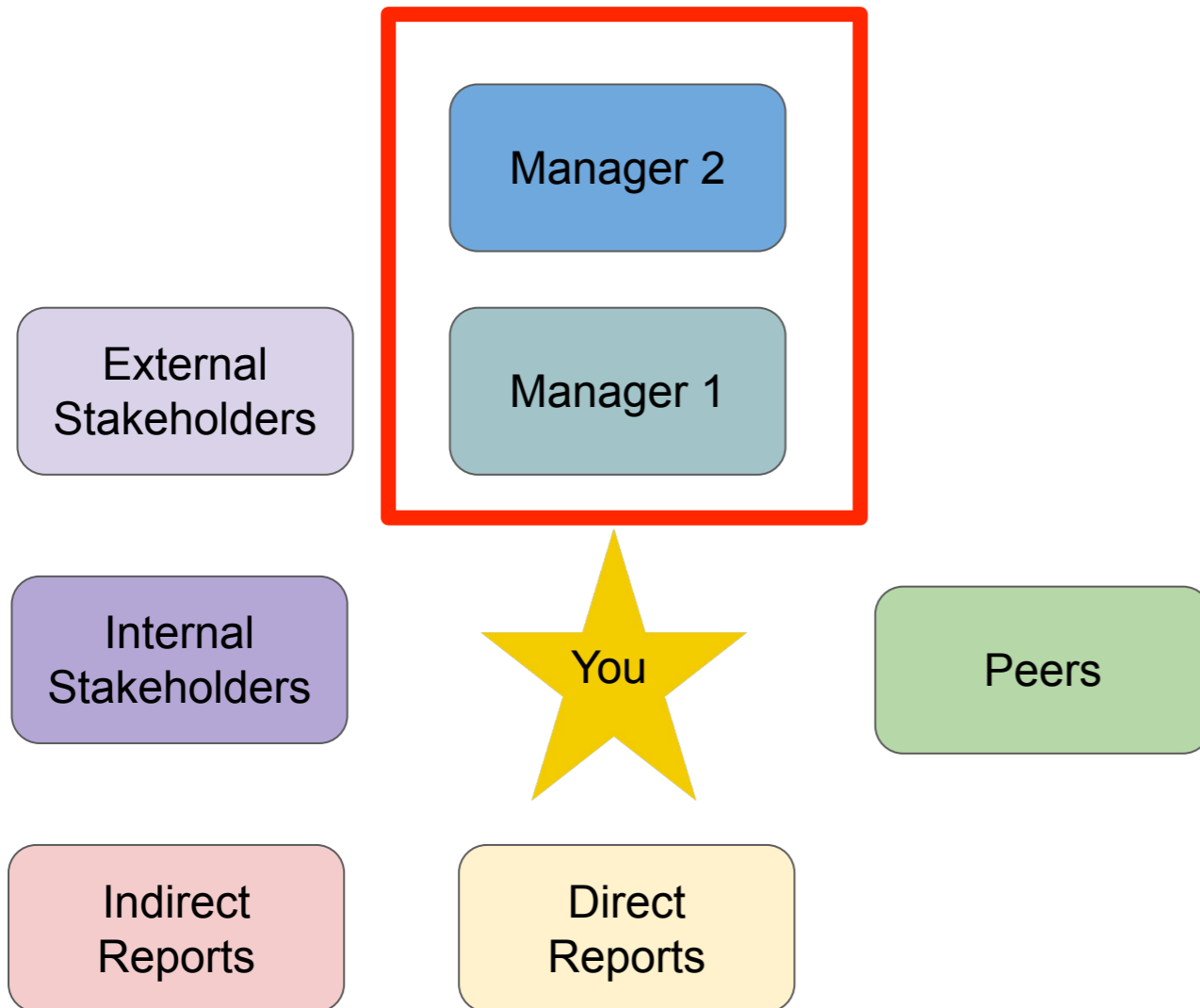
- What's important to your decision makers?

- Are you representing the work clearly?

- Are you telling the right story?

Look down and across
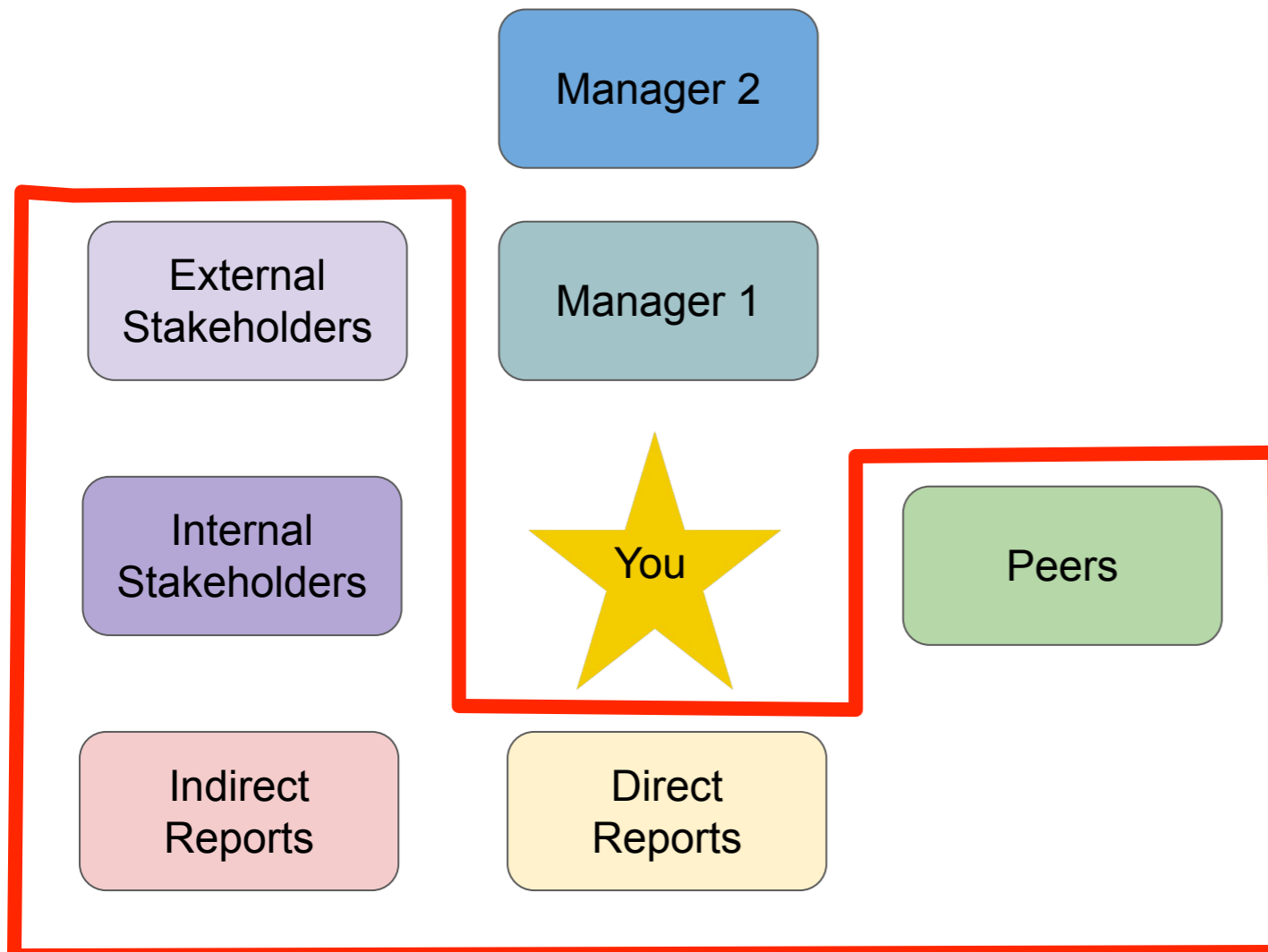
- Are reports and stakeholders aligned on expectations?

- Are roles and responsibilities clearly defined?

- Are you focusing on outcomes vs. activities?

Deliver the **right content** to your audience

Strategic   *Tactical*
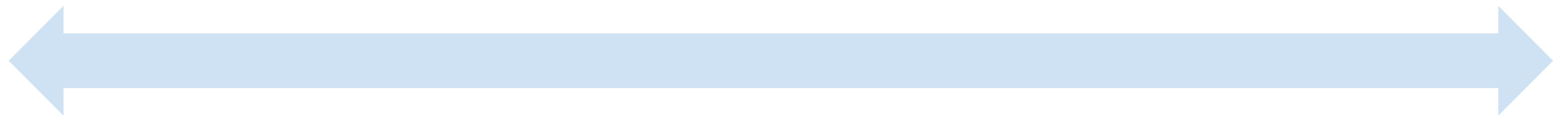
Leaders   **Managers**   **Reports**   **Stakeholders**   **Peers**

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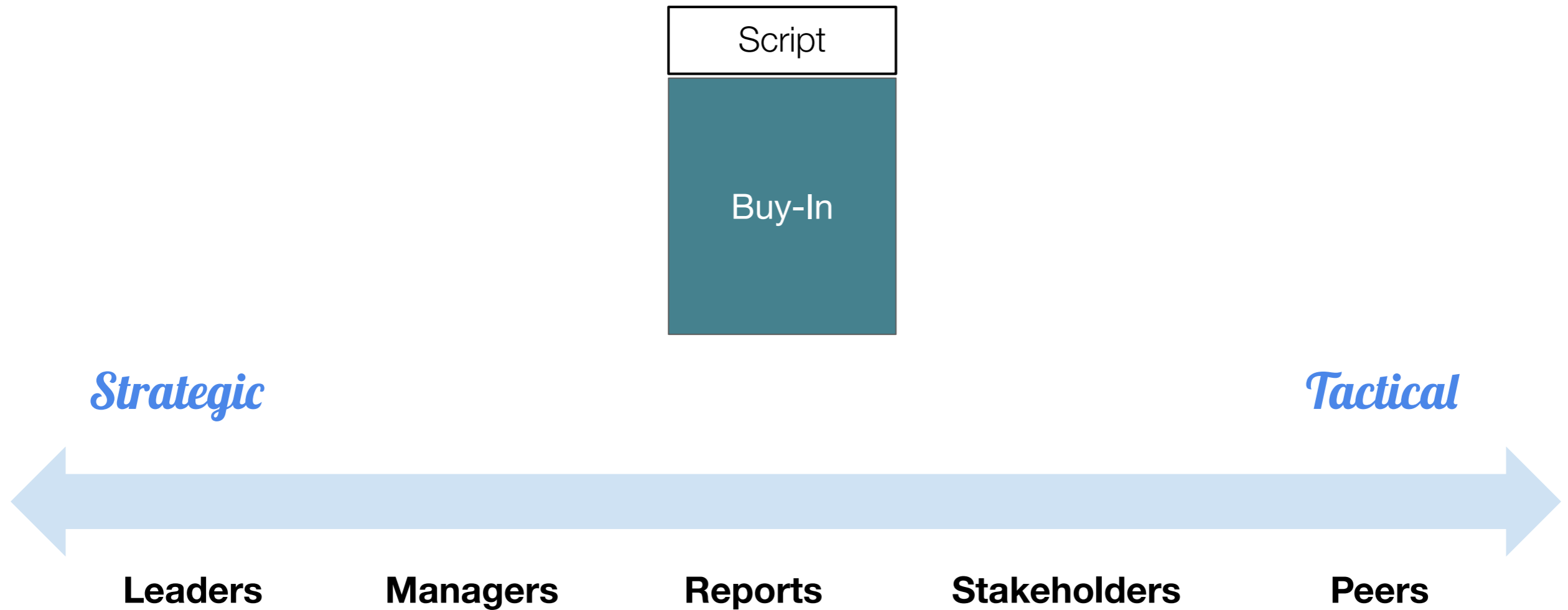
Your content

- Humans are wired for **structure** and **stories**

- Organize your content and connect key ideas for better engagement

Secure buy-In

Secure buy-in

1. Discuss **goal**

2. Secure **acknowledgement and support**

3. Agree on **key metrics** and **prioritization**

4. Schedule **regular check-ins**

Step 1: Identify and articulate your goal

Audience	Message
Major donor	With your support, we can successfully launch the Star Program.
Direct report	Can you help assess if Partner A is a good match for our program?
Stakeholder	We need your team to fix this bug on the site asap.

Step 1: Identify and articulate your goal

Audience	Vague and unclear	Clear and actionable
Major donor	With your support, we can successfully launch the Star Program.	With a donation of $X, we will be able to teach critical skills to 500K students this year which is 250% YoY growth in reach.
Direct report	Can you help assess if Partner A is a good match for our program?	Can you confirm if Partner A satisfies our program success criteria by next week's meeting?
Stakeholder	We need your team to fix this bug asap.	Currently we are losing 50% site visitors due to this broken link. Can we prioritize fixing this issue so we can capture potential leads for our event this month.

SMART: specific, measurable, achievable, relevant, time-bound

Step 2: Secure acknowledgment and support

Get on the **same page**

Do you feel that [insert goal] is reasonable?

Are we on track to achieve [insert goal] by [insert target date]?

Step 3: Agree on key metrics and prioritization
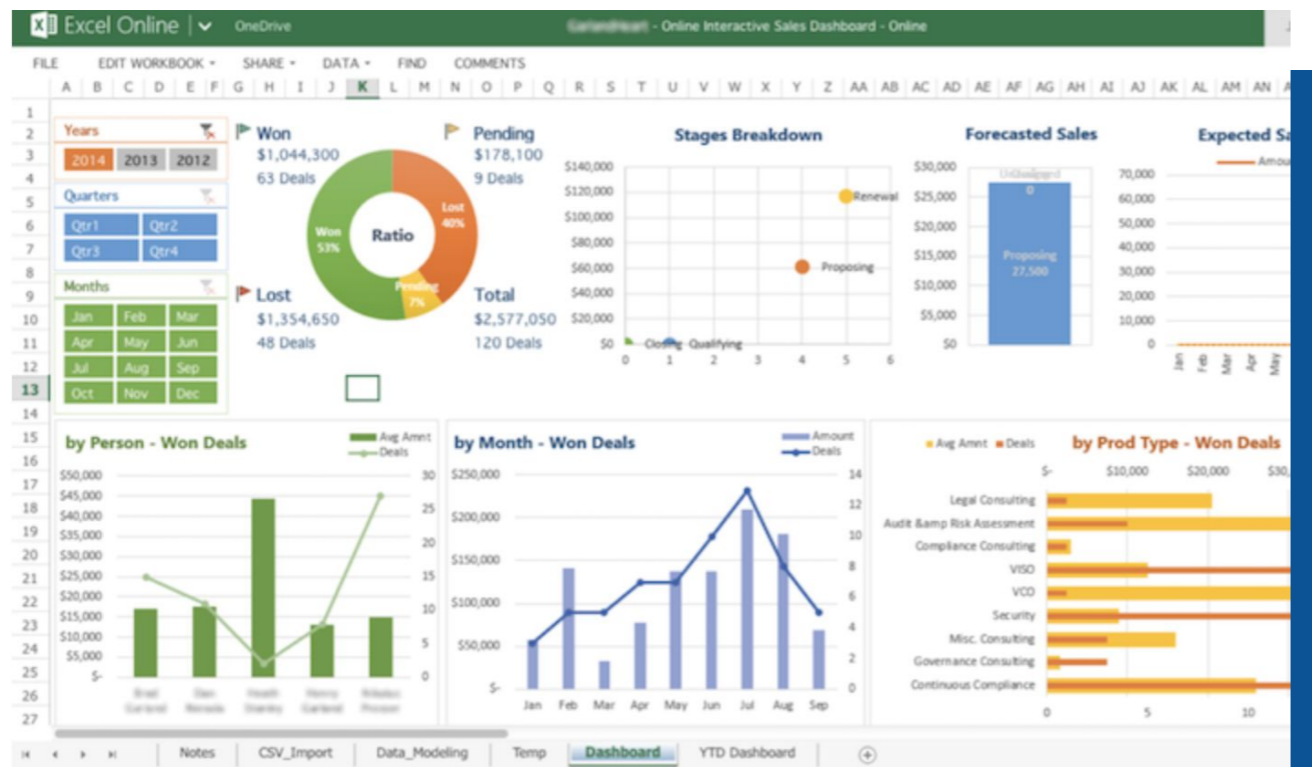
Dashboard by Josh Lorg

What results do we need to demonstrate in order to achieve [insert goal]?

Who do I need to convince?

Thinkers
risk-averse, logical

Charismatics
excitable, waits to decide

Followers
responsible, cautious

Skeptics
suspicious, combative

Controllers
cold, hard facts

Appeal to the decision-making style

Style	Strategy	Buzzwords
Charismatic	Balance their enthusiasm - stick to simple and straightforward arguments/visuals that focus on results	Proven, results, easy, clear, focus
Thinker	Lean into data - present market research, data, case studies	Quality, plan, expert, proof, academic
Follower	Focus on proven methods, references, testimonials	Innovate, expertise, similar to, previous
Skeptic	Earn trust by establishing clout or endorsement from someone they trust	Power, action, demand, disrupt, trust
Controller	Don't present an aggressive case, present expert opinion, facts, and details and then let them convince themselves.	Details, facts, reason, logic

Is your data compelling?

Employee:

"This past quarter I developed 30 new processes to introduce more efficiency into our org's systems. Based on these efforts, I believe I deserve a raise."

Manager's inner monologue while nodding politely:

"Your 30 new processes have resulted in more headache than efficiency. There's been no adoption and but there have been 10 new weekly meetings added. You lack self-awareness and are annoying me."

Step 4: Schedule regular check-ins

Set expectations around sync up **frequency** and **timing**

"Thank you for clarifying the steps that need to happen. Do you mind if we touch base regarding progress once a month during our weekly 1:1s to ensure that we are on track?"

Be An Active Listener

Bad news

- Communicate bad news and challenges, even if you have them under control

- Be a straight shooter; don't sugarcoat

"I'm glad to be here, and I know what I know."

Navigate push back

Transform the "no" into progress

1. Take a **deep breath**

2. **Pause** and reflect

3. Ask thoughtful **questions**

Engage with curiosity

Understanding	Information	Options
- What would need to change for this to be possible? - What's the reasoning behind the pushback?	- What can I do to help us move closer to a yes? - Do we need more data, analysis, or proof to support this request?	- Are there temporary solutions we can consider? - If my desired outcome isn't possible, what is?

Be a great listener so you can understand what is needed in the moment

Don't be the best kept secret in your organization.

Achieve greater visibility and impact

Script #1	Script #2	Script #3	Script #4	Script #5
Buy-In	Collaborative Outcomes Approach	Prioritization Framework	Direct feedback	Active Listening + Positive Comm

Strategic   *Tactical*

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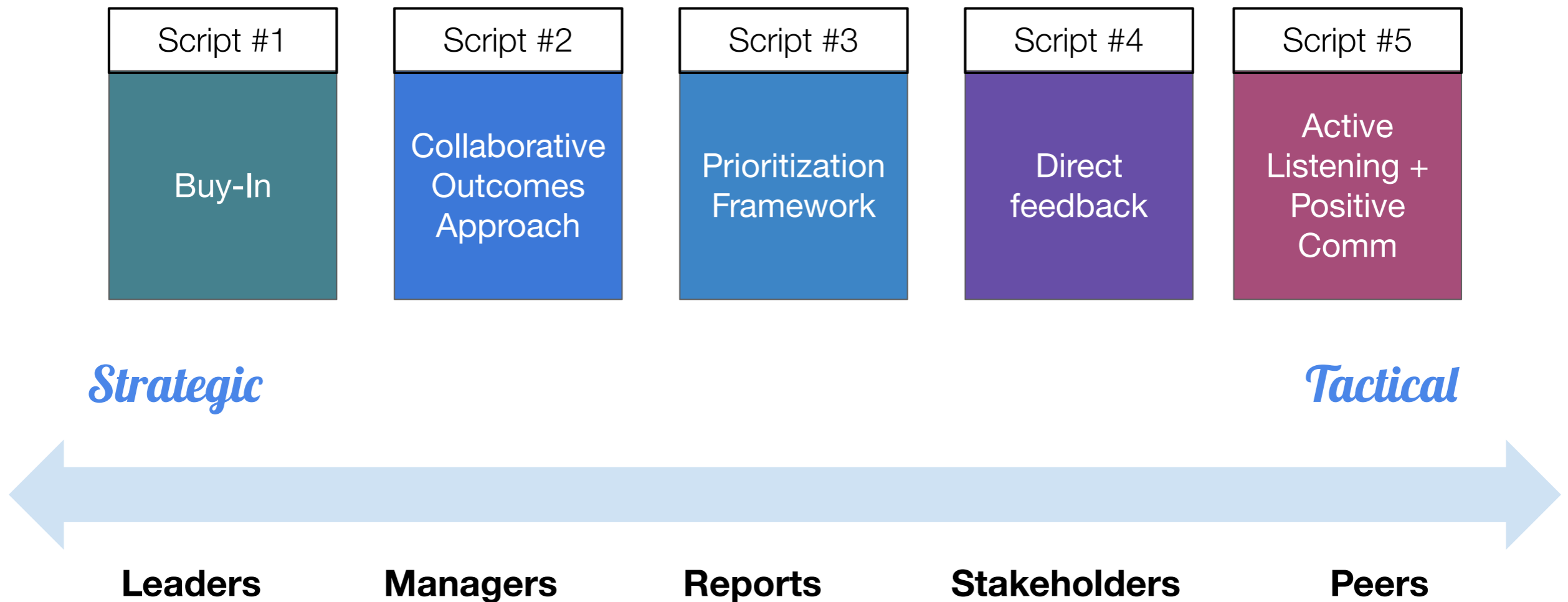
Questions?

email: nita1@stanford.edu

X **in** @nitakaushal

Recommended resources

My newsletter: https://advocateformore.substack.com

Upcoming Stanford Continuing Studies Course: BUS126 Managing Up, Down, and Across

Negotiation Scripting 101

Succeed at your next negotiation with the Collaborative Outcomes Approach.

ADVOCATEFORMORE.SUBSTACK.COM

How does your decision maker make decisions?

ADVOCATEFORMORE.SUBSTACK.COM

Turning a "no" into progress

ADVOCATEFORMORE.SUBSTACK.COM