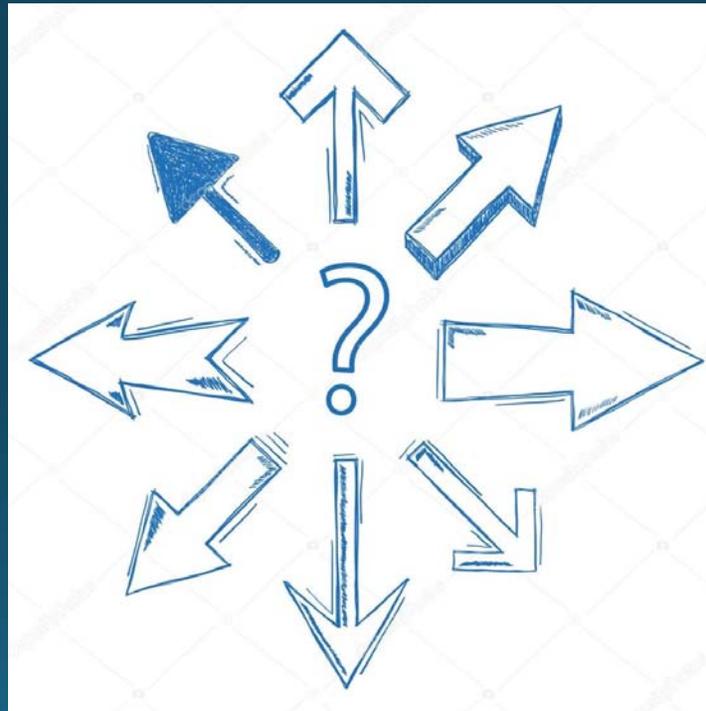


Influencing Up, Out and Across





Rob Kramer

UNC Academic Leadership
Programs

CCL Executive Coach

Kramer Leadership

Case Studies

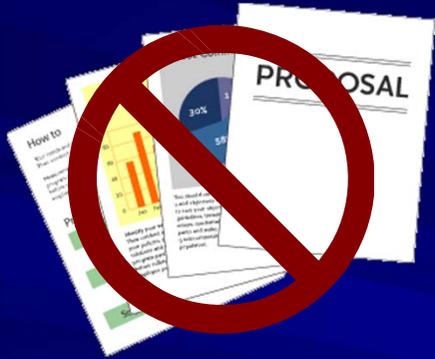
Case Study



Case Study



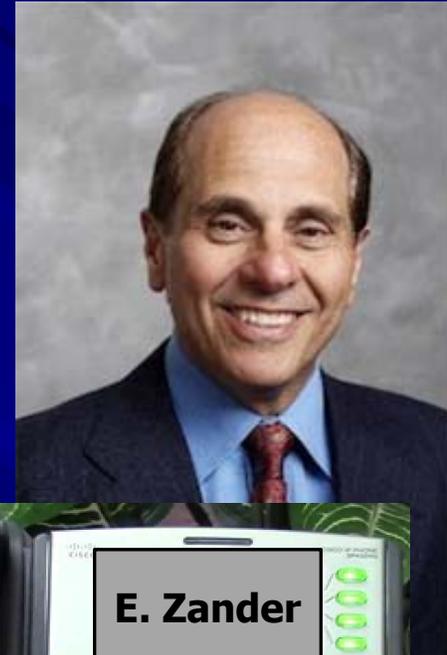
Case Study



Ed Zander



Case Study



Case Study



Case Study



ORACLE®

Case Study



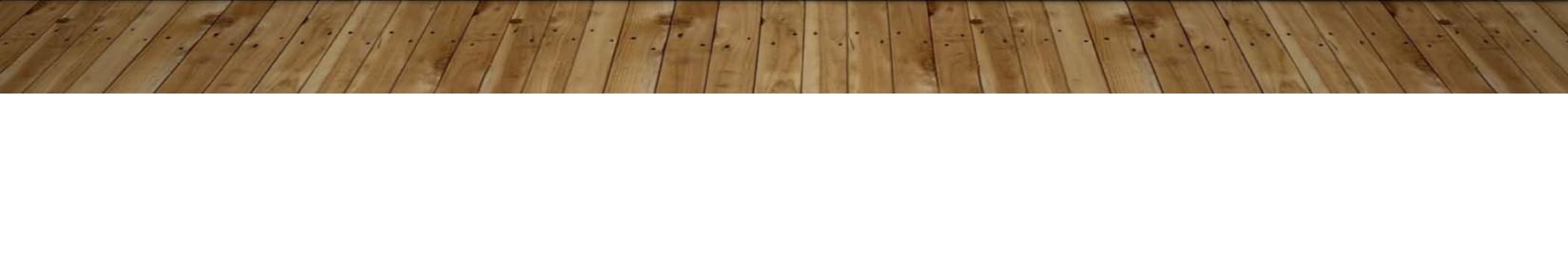


Case Study



What did he do to lead up?

CHRIS CASE STUDY: *WHAT DID HE DO TO LEAD UP EFFECTIVELY?*

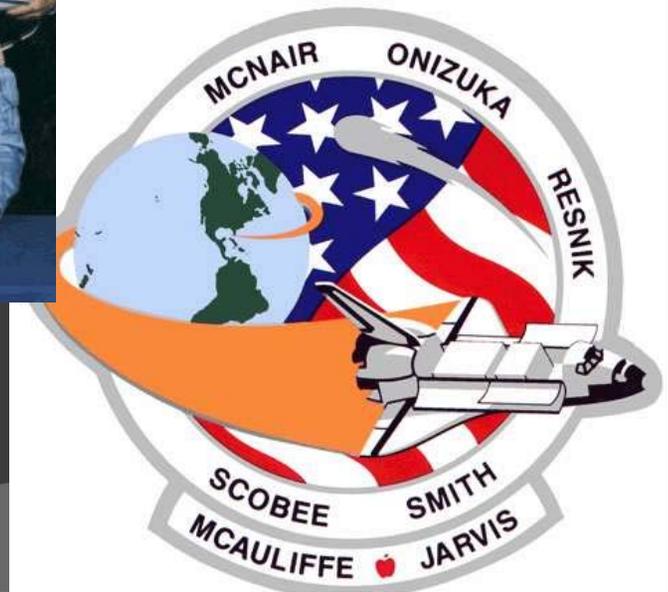
- A. Followed the proper chain/hierarchy, and asked permission.
 - B. Persistent and took risks.
 - C. Built relationships with gatekeepers.
 - D. Had a good elevator speech.
 - E. Was a content expert.
- 

Case Study

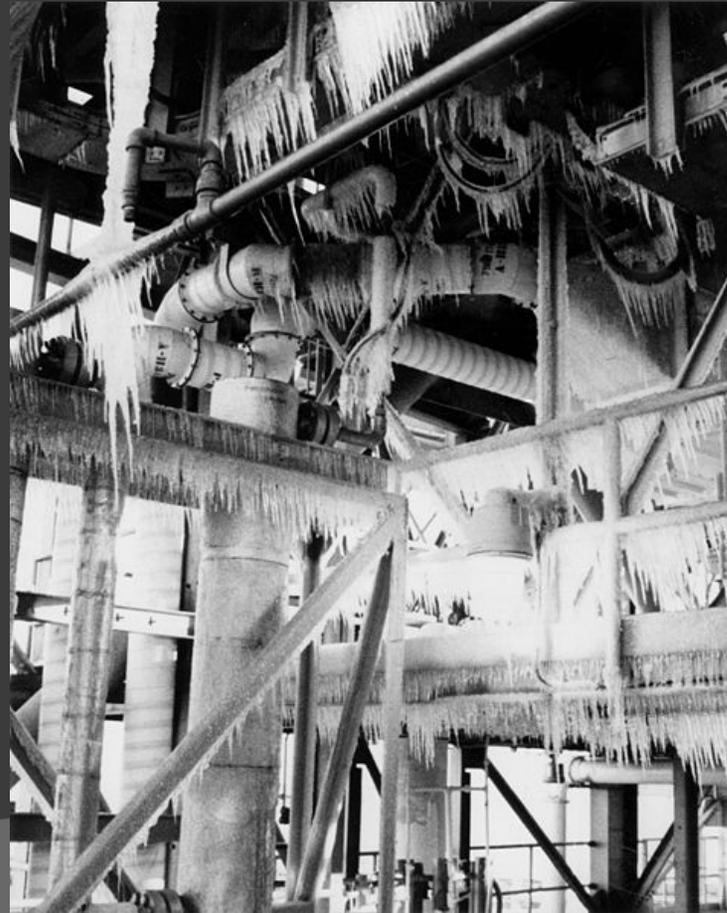


Space Shuttle Challenger

Case Study



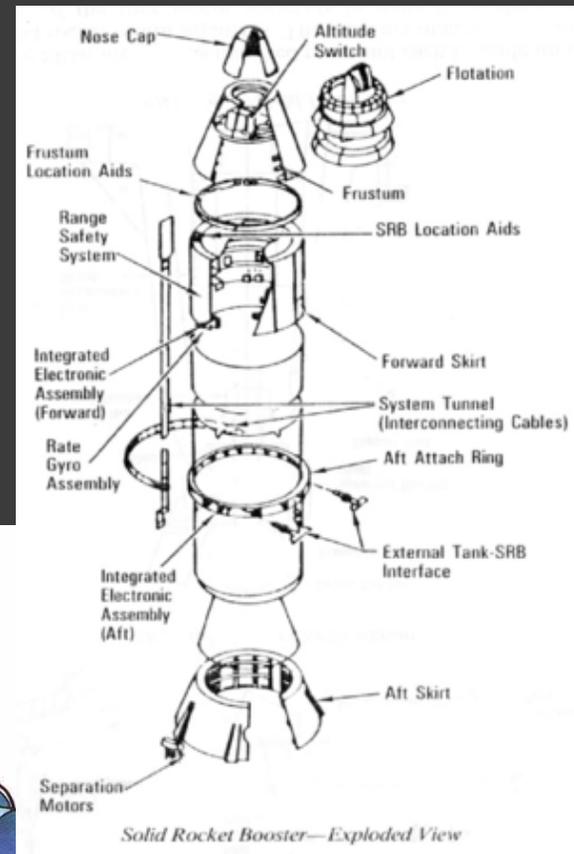
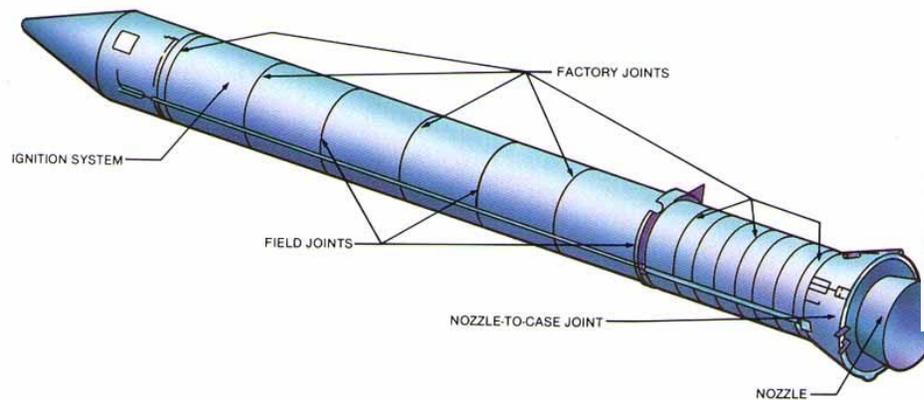
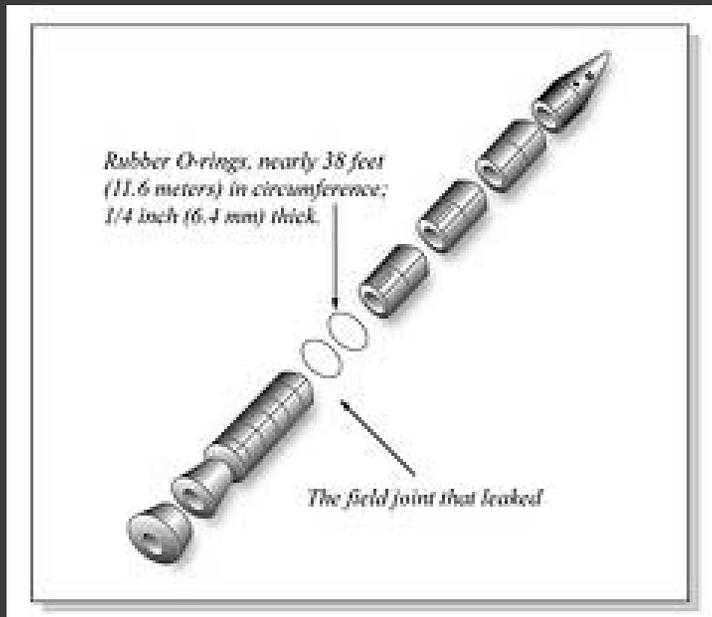
Case Study



Case Study



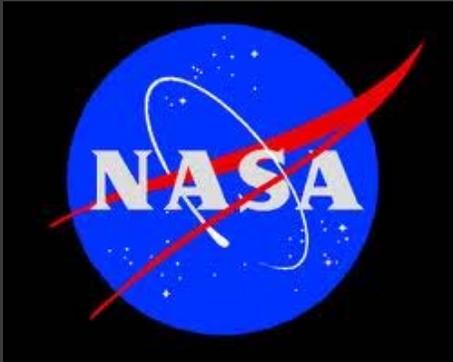
Case Study



Case Study



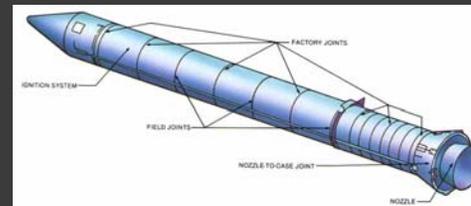
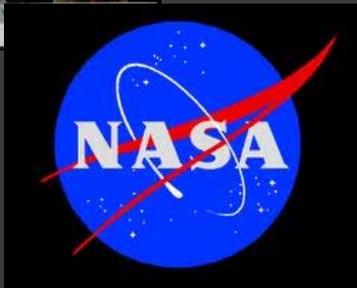
Case Study



“...failures in communication... resulted in a decision to launch 51-L based on incomplete and sometimes misleading information, a conflict between engineering data and management judgments, and a NASA management structure that permitted internal flight safety problems to bypass key Shuttle managers.”



Case Study



What seem to be the failures in leading up?

NASA CASE STUDY: *WHAT SEEM TO BE THE FAILURES IN LEADING UP?*

- A. Scientists not able to adequately explain their safety concerns in a way that influenced management.
- B. Media and political pressures on management were stronger than the scientists' pressure on management.
- C. The consultants from the 'o-ring' vendor did not push hard enough for fear of risking their contract with NASA.

In pairs
share and discuss:

What is a key leading up, out or across
challenge you are facing?
(currently or anticipated)

Foundations for Leading Up

Key Foundation for Success:

Are you seen
as a high performer
by those
you want to influence?

Key Foundation for Success:

Before you can lead up, out or across
you
must make 2 *internal* decisions

1. *You must accept that others have limitations as managers, leaders, and as people*



2. *You must be willing to take responsibility for building a relationship and clarifying expectations*



Key Foundation for Success:

Before you can lead up, out or across
you
must make 2 *external* decisions

1. *You must be able to clarify the difference between leading up and managing up*



2. *You must be able to assess and understand (or at least conscientiously observe) your surroundings*



QUESTION – FOUNDATIONS:
WHICH OF THESE ARE YOU BEST AT DOING?

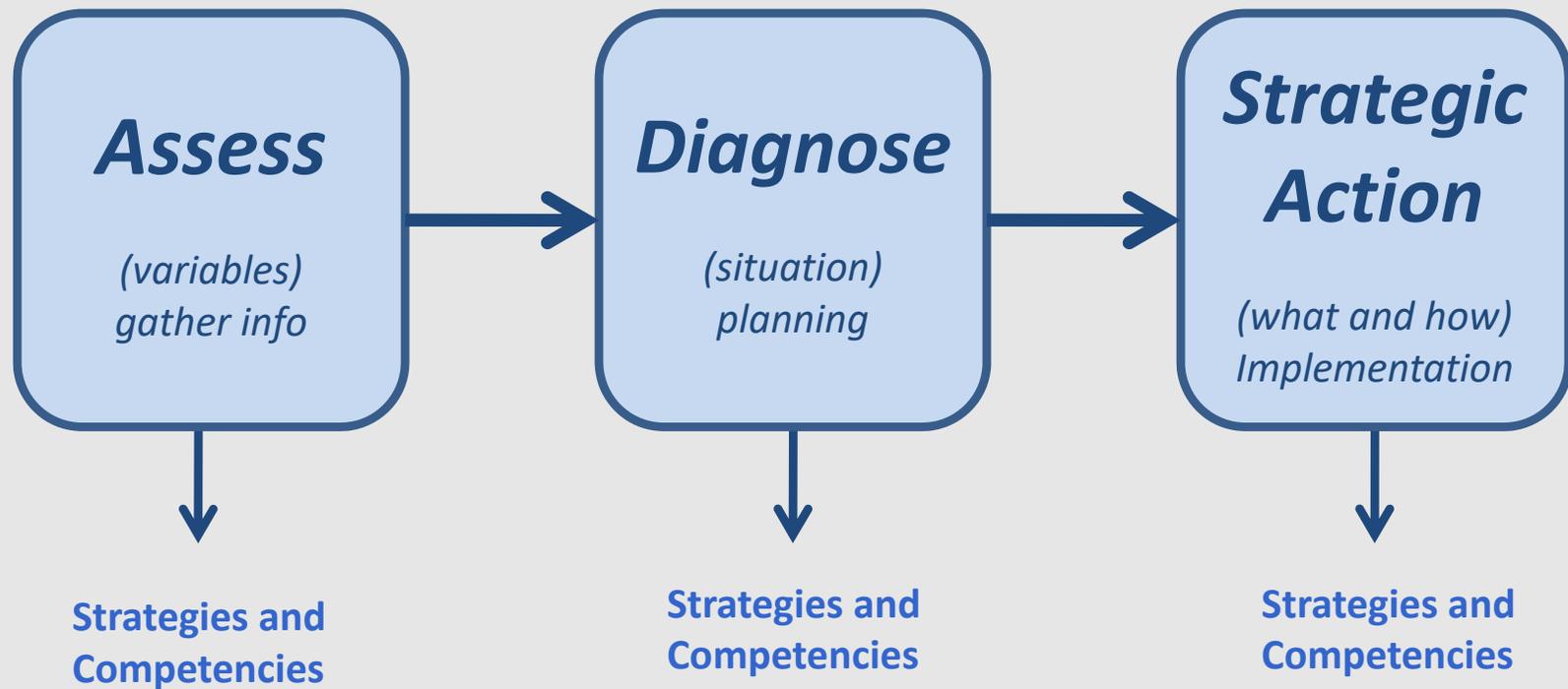
- A. Accepting others have limitations/are human
- B. Taking responsibility for building relationship and clarifying expectations with others
- C. Understanding when to “lead up” versus “manage up”
- D. Assessing your surroundings (political/people savvy)

QUESTION – FOUNDATIONS:
WHICH OF THESE ARE YOU WORST AT DOING?

- A. Accepting others have limitations/are human
- B. Taking responsibility for building relationship and clarifying expectations with others
- C. Understanding when to “lead up” versus “manage up”
- D. Assessing your surroundings (political/people savvy)

ADS Model

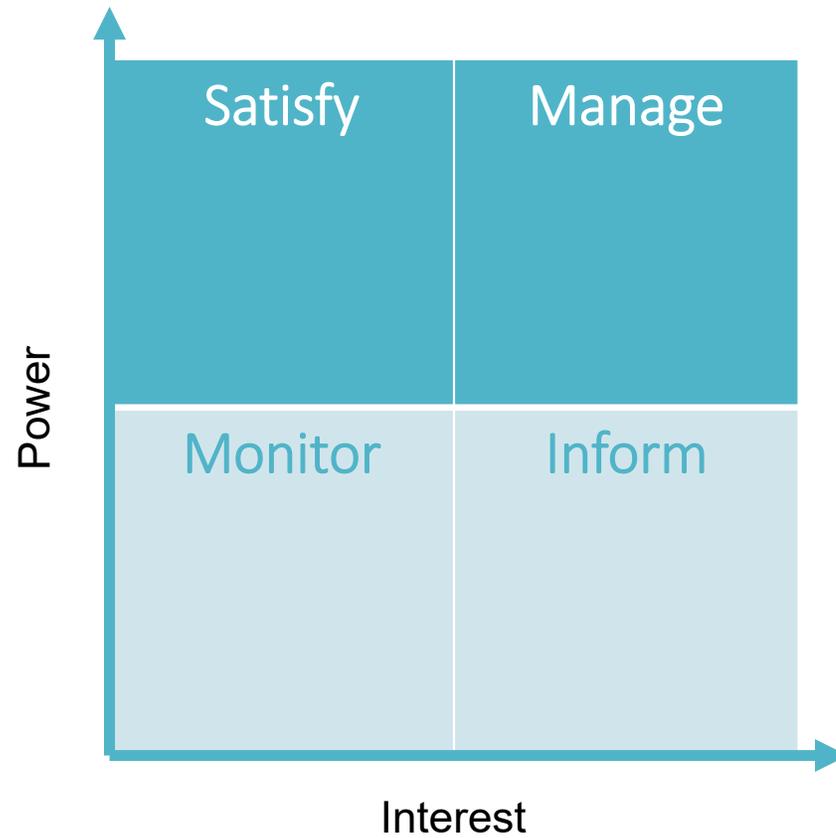
Who do I want to influence?



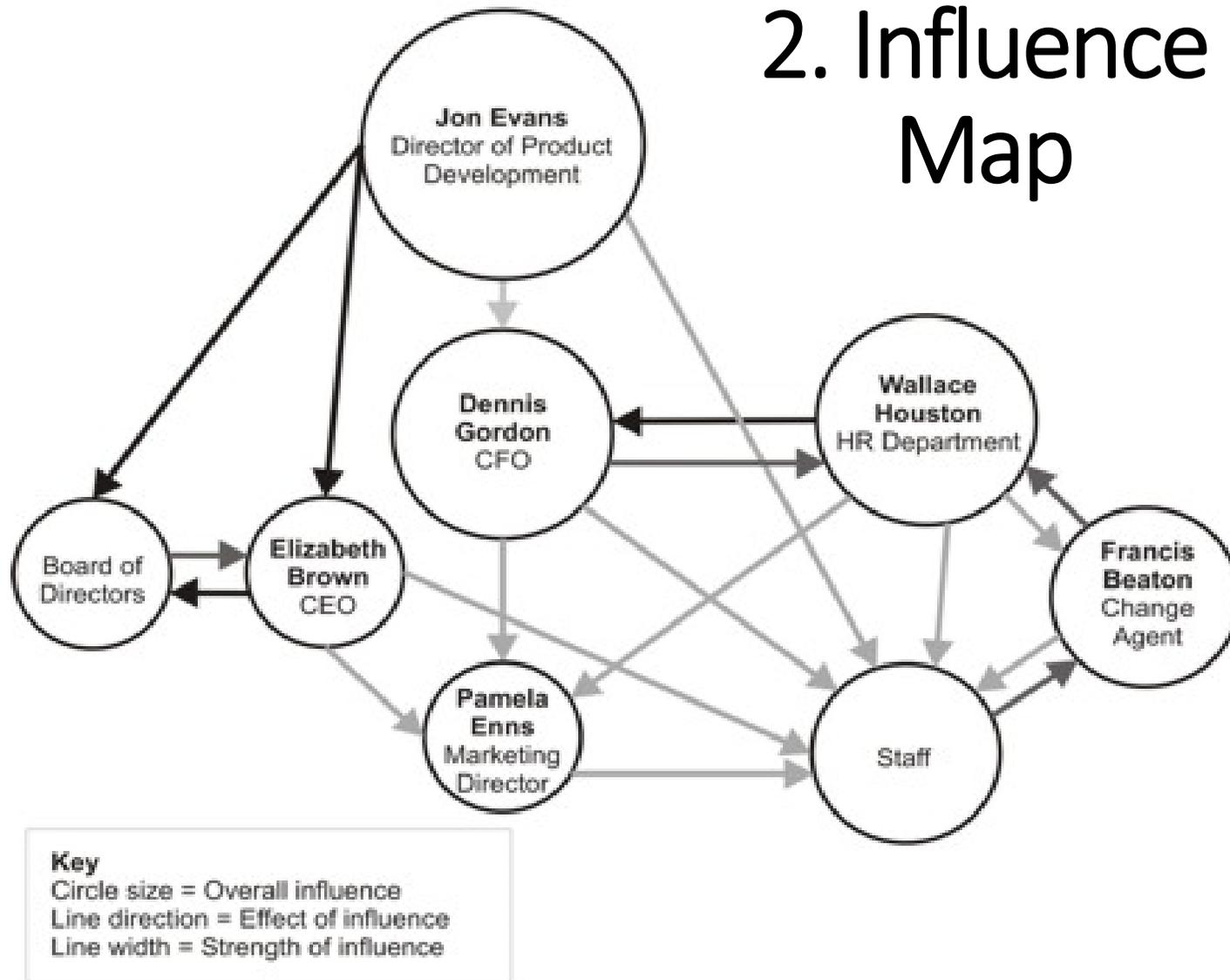
Assessing the Variables

Stakeholder Analysis

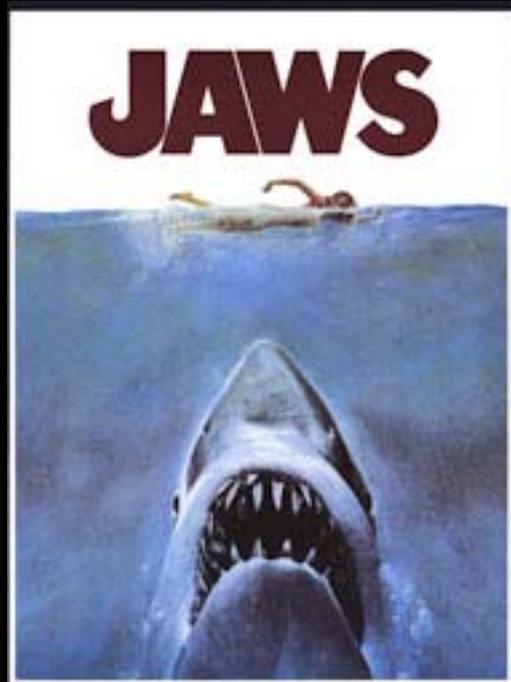
1. Power-Interest Grid



2. Influence Map



Case Study





Mayor



Medical Examiner



Town Council



Shark Expert



Sheriff



Press/Media

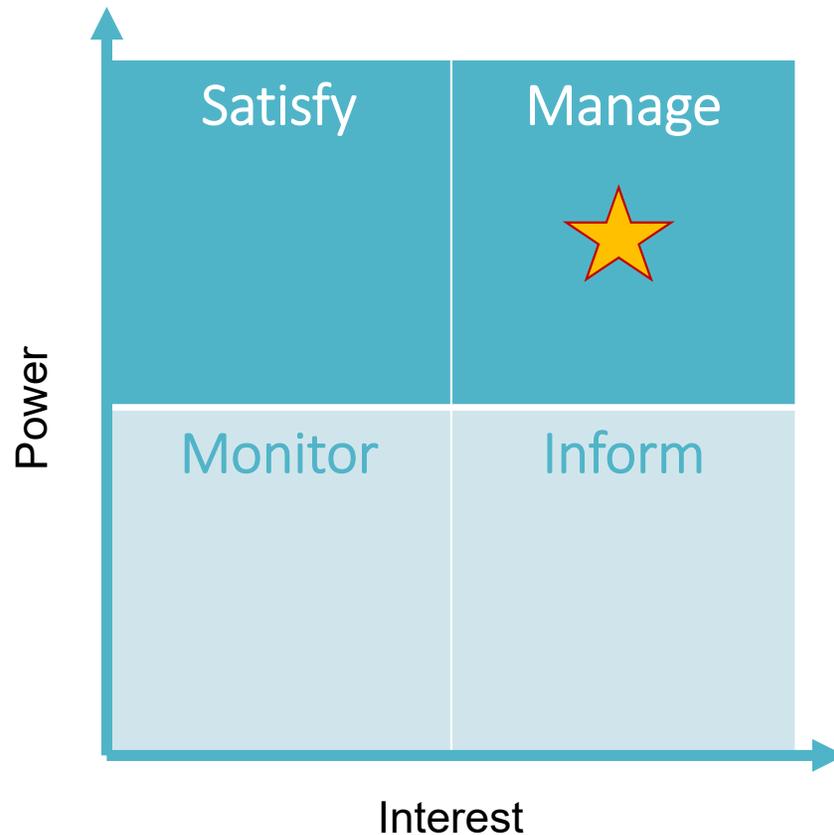


Townsppeople



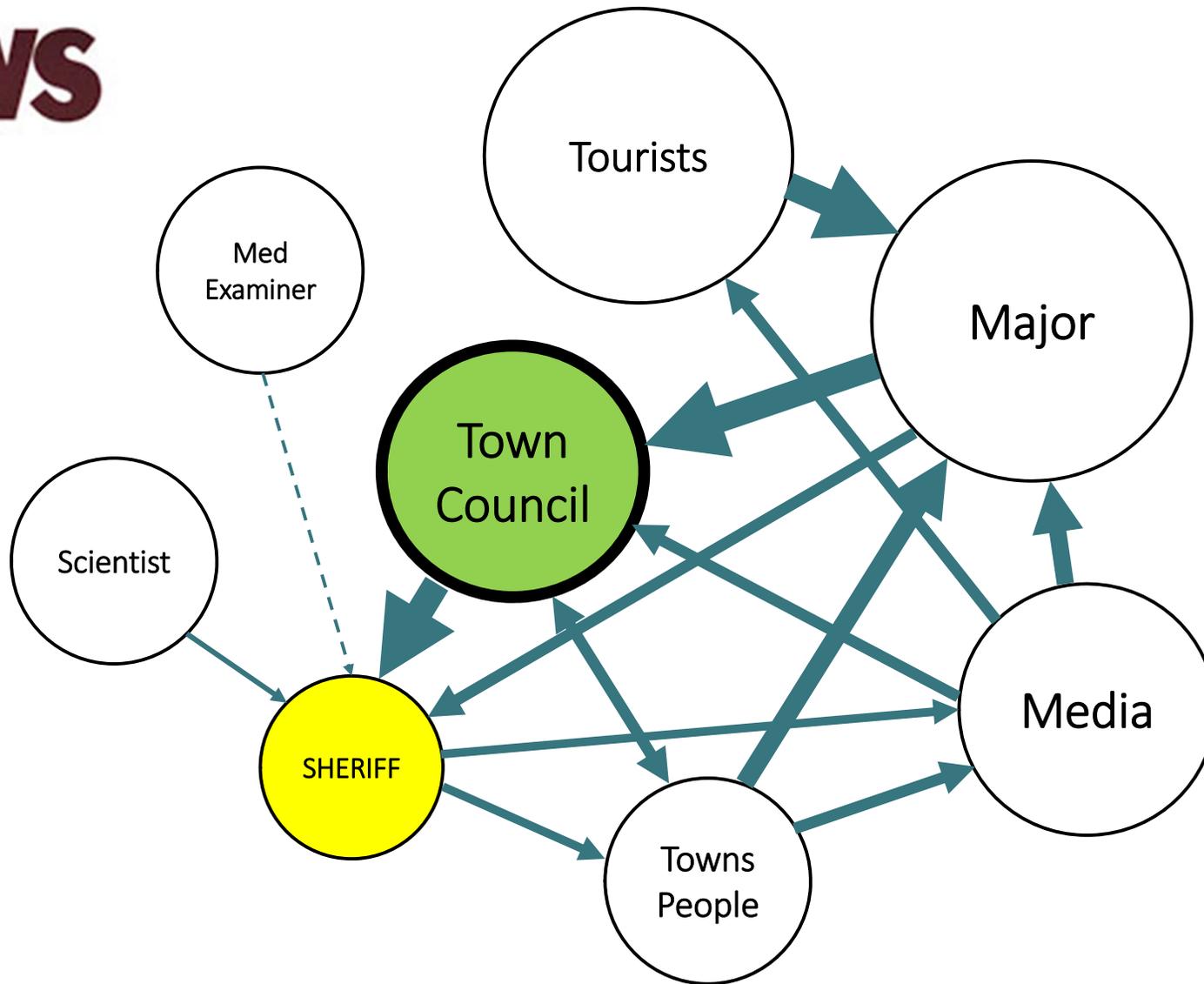
Tourists

1. Power-Interest Grid



- Mayor
- Media/Press
- Medical Examiner
- Scientist
- Town Council ←
- Townspeople
- Tourists

JAWS



Assess

*(variables)
gather info*

Quality of the relationship, context, and politics

- Questions for Assessing:
 - *Can I stand in their shoes? Understand their world?*
 - *How do they perceive their world?*
 - *How does she/he/they perceive me?*
 - *Do I know what's in it for them? What drives them?*
 - *Do I need to manage or lead up? Or both?*
 - *What have I not been exploring (avoiding)?*

Diagnose Possibilities

Diagnose

*(situation)
planning*

Choosing interventions:

- ✓ **Consider what strategies to use.**



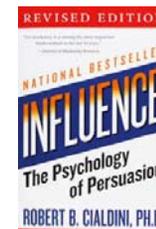
Power and Influence

1. Coercive
2. Reward
3. Legitimate
4. Referent
5. Expert
6. Informational

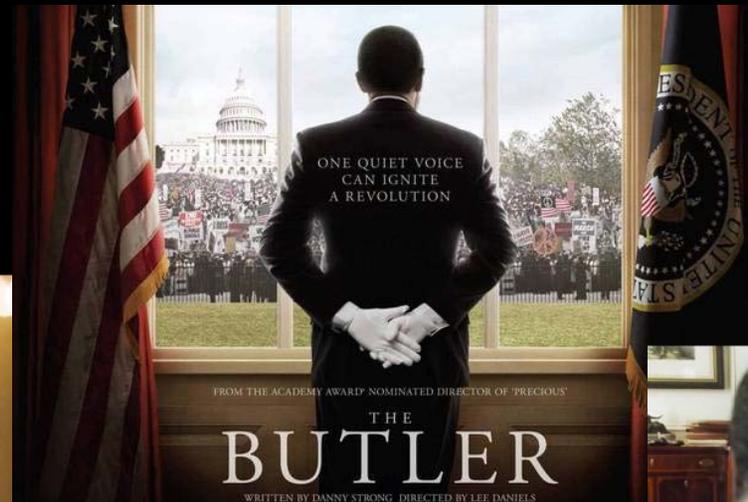
1. Reciprocity
2. Commitment
3. Social Proof
4. Liking
5. Authority
6. Scarcity



French & Raven



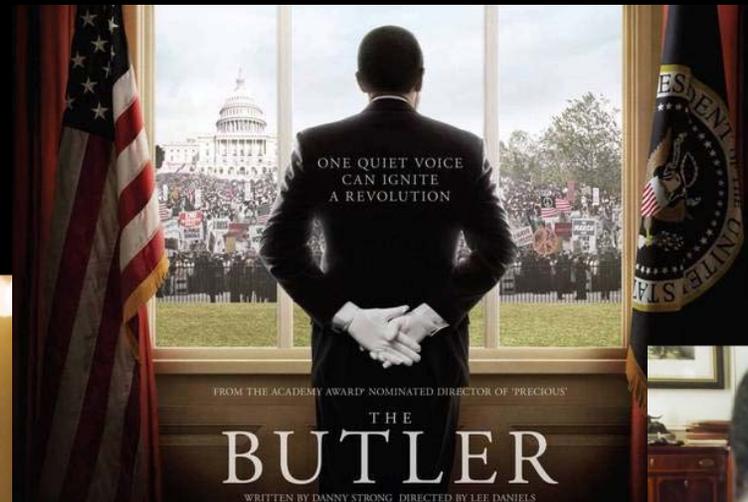
VIDEO CASE STUDY



What power/influence does Cecil use with the boss?



VIDEO CASE STUDY



What power/influence does Cecil use with the boss?

QUESTION:
*WHICH ITEMS ARE PRACTICED MORE
IN YOUR WORKPLACE?*

A. Power Items

- Coercive
- Reward
- Legitimate
- Referent
- Expert
- Informational

B. Influence Items

- Reciprocity
- Commitment
- Social Proof
- Liking
- Authority
- Scarcity

Diagnose

*(situation)
planning*

Choosing intervention

- Barriers/Opportunities to strategic action:
 - *What do I know has not worked in the past to influence this person? What has worked?*
 - *What would cause this person to be/not be receptive?*
 - *Who has successfully influenced this person? How?*
 - *What is my mindset towards this person? Situation?*
 - *What action(s) could I do, what am I willing to do?*
 - *What power do I have? Influence strategies I can try?*

Strategies for Action

Strategic Action

*(what and how)
Implementation*

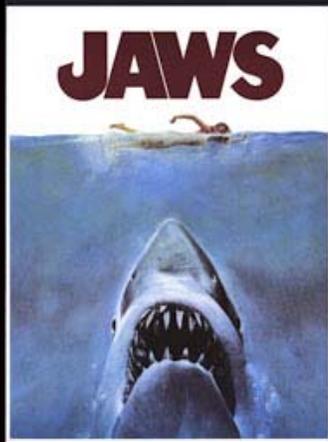
What and how to move forward

- Communication Competence



Kole Model of Communication

- **What?** What is it exactly you would like me to do? Tell me the details of the task.
- **Why?** Why am I being asked to do this? Tell me the immediate purpose or meaning.
- **How?** How am I supposed to get this done? Tell me the process.
- **What for?** What does this mean to our mission? Tell me the long term impact.



Case Study



Influencing Mayor?





Case Study

What communication strategies
did/might the sheriff try?

What, Why, How, What For



QUESTION:
*WHICH OF THESE FOUR QUESTIONS
IS MOST IMPORTANT TO YOU?*

- A. WHAT:** What is it exactly you would like me to do?
Tell me the details of the task.
- B. WHY:** Why am I being asked to do this?
Tell me the immediate purpose or meaning.
- C. HOW:** How am I supposed to get this done?
Tell me the process.
- D. WHAT FOR:** What does this mean to our mission?
Tell me the long term impact.

Strategic Action

*(what and how)
Implementation*

What and how to move forward

- Communication Competence
 - *Address What? Why? How? What for?*



Reflection Activity:

- Consider what you might try in your Leading Up situation
- Start to outline a strategy

In original pairs share and discuss:

- Your strategy created today.
- Partner: Listen, ask questions, provide feedback.

5 Principle Practices

1. **Your Success Rate is Best When You Are Seen as a High Performer.**
2. **Manage First.**
3. **Build a Relationship of Trust.**
4. **Leverage Power and Influence.**
5. **Focus on What You Can Change.**

E Pluribus Unum

*To a large extent, (it) is simply about
having the right attitude and realizing you
do have the power and influence
to make things better.*

~ Thomas J. Zuber, MD, and
Erika H. James, PhD



Thank You!

Rob Kramer

KramerLeadership.com