

# PARTICIPANT GUIDE FOR:



SOCIETY OF  
RESEARCH  
ADMINISTRATORS  
INTERNATIONAL



## T504: Managing Up: What No One Tells You About Managing Your Boss

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### Learning Objectives:

By the end of this session, participants will learn...

1. Tips on how to best “manage” your boss to aid them in **their** success.
2. Tips on how to best “manage” your boss to aid them in **your** success.



## COURSE PURPOSE:

This session aims to equip participants with strategies to foster a winning relationship with their manager—one that benefits the organization and offers professional rewards for everyone involved.

## INTRODUCTION

To achieve our learning objectives, we'll start by defining what "Managing Up" is and its importance. Additionally, we'll cover the essentials of effective communication, which will directly apply to tips and strategies discussed

## WHAT IS MANAGING UP?

**Definition:** process of building & maintaining a positive, productive relationship with your boss.

**Importance:** understanding how to manage up is key for career growth, achieving team objectives, and enhancing your work environment.

**NOTES:**

## EFFECTIVE COMMUNICATION IN MANAGING UP

### TOOL BOX 1



### Here's what it looks like in practice:

#### **Be Clear, Concise, and Structured**

- Get to the point quickly. Lead with the headline—what's the issue, decision, or update?
- Use structured communication. Bullet points, clear subject lines, and bolded takeaways help them process information fast.

#### **Anticipate Questions and Needs**

- Think ahead. What will they want to know? What will they be asked by their boss?
- Answer those questions before they ask.
- Provide options or recommendations if you're escalating something. *Example: "We're facing X. Here are two options I recommend, and I suggest we move forward with option A because..."*

#### **Be Honest but Solution-Focused**

- Don't sugarcoat bad news—tell them early.
- But always pair a problem with a proposed solution or action plan.

#### **Adapt to Their Style and Preferences**

- Do they prefer quick chats, detailed emails, or dashboards? Mirror that.
- Do they want frequent updates or high-level overviews unless something's on fire? Match their rhythm.
- If they hate surprises, keep them in the loop regularly, even if there's "nothing new."

#### **Be Respectful of Their Time**

- Don't over communicate and avoid giving them everything—filter and prioritize.
- If you need their decision or approval, provide time you need answer by

#### **Document and Recap**

- After meetings or important convos, send a short recap: What was discussed, what was decided, who owns what, and by when? This builds alignment and avoids confusion later.

#### **Build Trust Through Consistency**

- Be dependable. Do what you say you'll do and keep them updated without needing to be chased.
- Over time, they'll trust you with more autonomy, which is a huge win.

### NOTES:

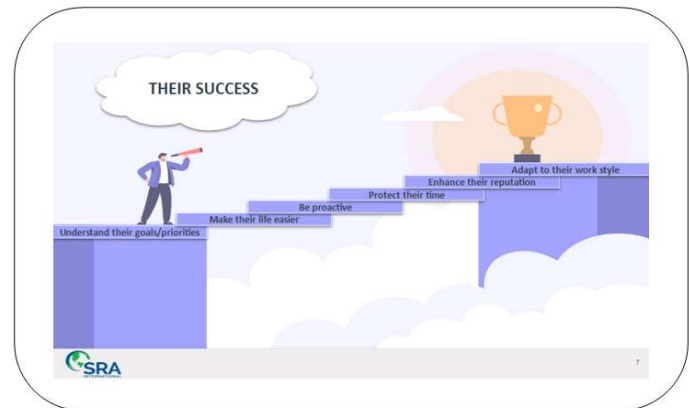
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**TIPS ON HOW TO BEST “MANAGE” YOUR BOSS TO AID THEM IN THEIR SUCCESS.**



**When your boss succeeds, it often reflects positively on you and the team.  
Here's how you can support them:**

**Understand Their Goals & Priorities**

- Know what success looks like for them.
- What are they being measured on? What keeps them up at night
- Align your work to support those goals without being asked

**Make Their Life Easier**

- Anticipate their needs. Provide solutions, not just problems.
- Be reliable—if they delegate something, handle it so they don't have to worry.
- Provide clear, concise updates. No one likes chasing for information.

**Be Proactive**

- Identify potential risks or challenges early and bring solutions.
- Offer to take tasks off their plate when you can (especially those they find tedious).

**Protect Their Time**

- Be prepared for meetings. Keep them brief and to the point.
- Avoid unnecessary noise—filter out what they don't need to deal with.

**Enhance Their Reputation**

- Speak positively about them when appropriate..
- Help the team deliver strong results that reflect well on their leadership.

**Adapt to Their Work Style**

- Learn their communication preferences (email, chat, calls?) and match their pace.
- Know if they prefer big-picture summaries or detailed breakdowns.

**TOOL BOX 2**



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## T504: Managing Up: What No One Tells You About Managing Your Boss

**SCENARIO #1:**  
Working with a micromanaging boss

**QUESTION :** You've noticed your boss tends to request frequent statuses of your tasks, insisting on check-ins that "could have been an email" and they seem overly tense about deadlines you own.

How do you work with your boss to find a way forward?



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**SCENARIO #2:**  
Managing different workstyles and conflict resolution

**QUESTION :** Your long-time boss recently retired and the new manager is from outside your organization. After some time, you feel discouraged as their management style has felt a bit "aggressive" and you've noticed they are making departmental changes that are causing discord amongst the team.

How do you work with your boss to find a way forward?



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**SCENARIO #3:**  
Working with unclear expectations or inconsistent communication

**QUESTION:** Your boss assigns you tasks that are urgent and need to be completed quickly, but over time the deadline keeps shifting—some getting delayed or pushed forward without any explanation. You start to question the accuracy of the deadlines and priority levels you being tasked with.

How do you work with your boss to find a way forward?



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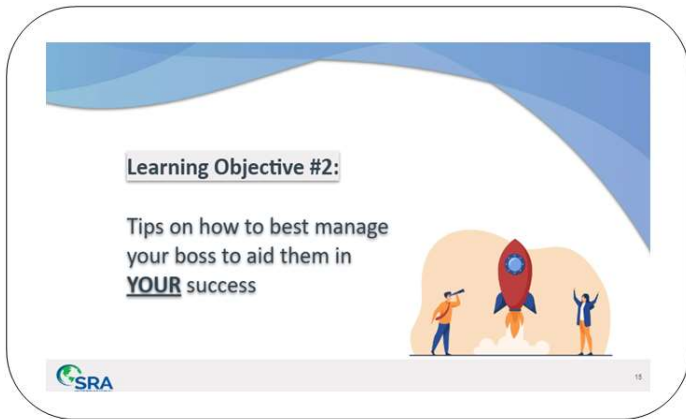
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## TIPS ON HOW TO BEST “MANAGE” YOUR BOSS TO AID THEM IN YOUR SUCCESS.



**Helping them help you means setting up an environment where you thrive.**  
**Here's how to approach it:**

### **Be Clear on Your Goals**

- Share your career aspirations and development interests.
- Be explicit about the type of feedback and support you need.

### **Educate Them on How You Work Best**

- Communicate your strengths and how you like to work.
- Let them know how you prefer to receive feedback—immediate, direct, etc.

### **Ask for Stretch Opportunities**

- Volunteer for projects that align with your goals or that will increase your visibility.
- Ask for mentorship or introductions to others in the organization.

### **Provide Upward Feedback (Tactfully)**

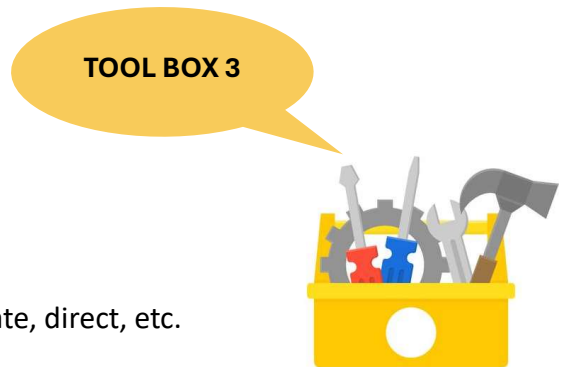
- If something isn't working for you (e.g., lack of clarity or support), find a diplomatic way to address it.
- Frame it in terms of mutual success: "I think I could deliver more if we tried X."

### **Demonstrate Value**

- Make your contributions visible without bragging. Keep them informed about your wins and progress.
- Document your achievements for performance reviews and make it easy for them to advocate for you.

### **Build Trust and Rapport**

- Follow through on commitments, be consistent, and show integrity. Trust earns autonomy.
- Be solution-oriented, making you a go-to person rather than a source of more work for them.



### **NOTES:**

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## T504: Managing Up: What No One Tells You About Managing Your Boss

**SCENARIO #1:**  
Feeling overworked and misunderstood?

**QUESTION:** Lately your workload feels unbearable with multiple competing priorities and deadlines that are getting hard to manage. You feel like no one understands what you are dealing with, being pulled in every direction.

How do you work with your boss to find a way forward?

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**SCENARIO #2:**  
Feeling stagnated, seeking promotions and/or new opportunities?

**QUESTION:** You have started feeling stagnant in your role of late, and are chasing either a promotion or new opportunities for yourself.

How do you work with your boss to find a way forward?

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**SCENARIO #3:**  
Noticing a lack of coordination, inefficient processes, and miscommunication?

**QUESTION:** You have noticed a lack of coordination, inefficiencies and miscommunication with the people and processes you need to get your work done.

How do you work with your boss/stakeholders to find a way forward?

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