

# Your Boss: Sorted!

Patrick Forsyth



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Patrick Forsyth

# **Your Boss: *Sorted!***

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Your Boss: *Sorted!*

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ISBN 978-87-403-0622-4

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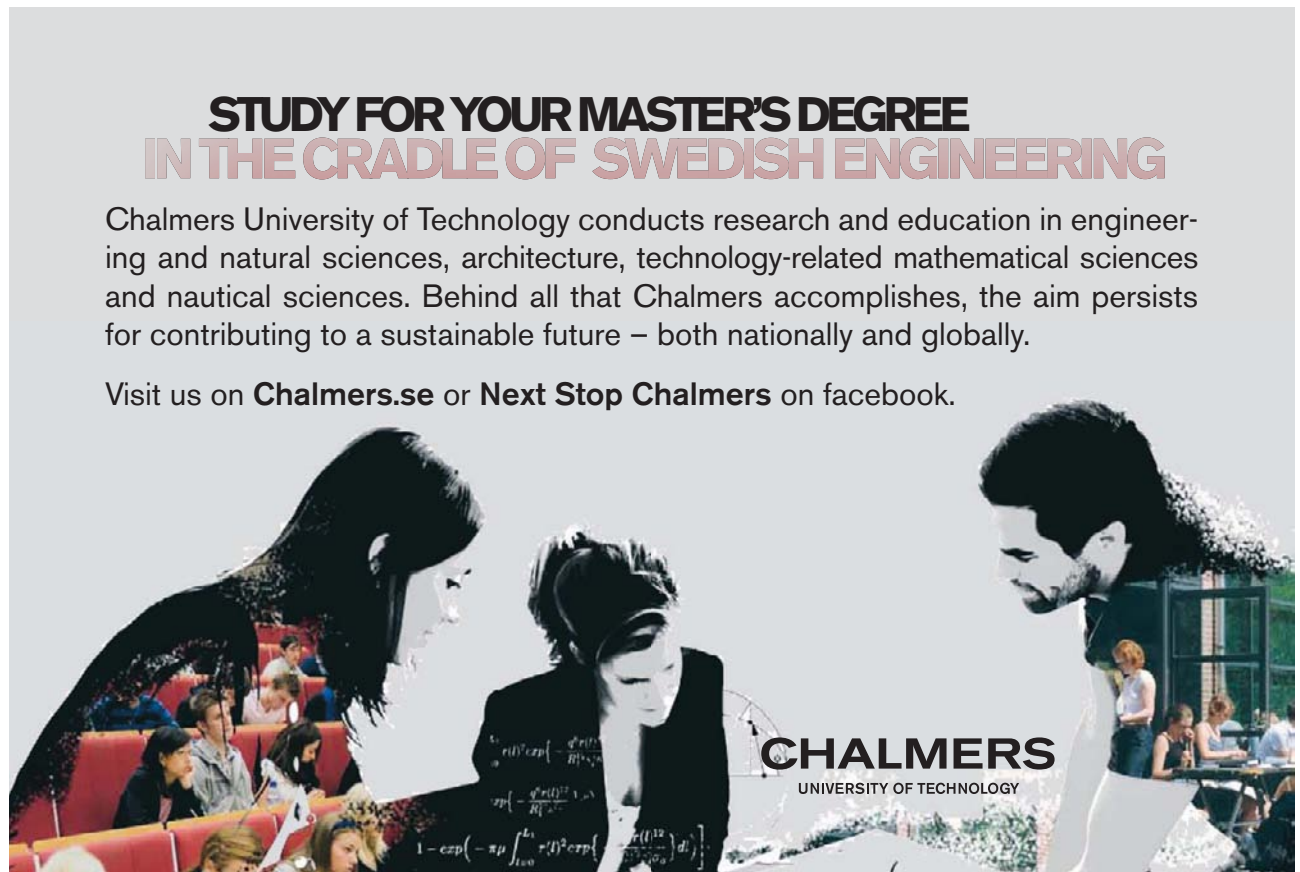


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# The author

Patrick Forsyth is a consultant, trainer and writer. He has worked with organisations large and small and in many different parts of the world. He is the author of many successful books on management, business and careers and prides himself on having a clear how-to style.

One reviewer (“Professional Marketing”) commented: *Patrick has a lucid and elegant style of writing which allows him to present information in a way that is organised, focussed and easy to apply.*

His writing extends beyond business and he has had published humorous books (e.g. *Empty when half full*) and light-hearted travel writing; his latest travel book is about Thailand and is titled *Smile because it happened*.

He can be contacted via [www.patrickforsyth.com](http://www.patrickforsyth.com)



# 1 Introduction: a major influence on job satisfaction and success

A great boss is good to have, but they are not all sweetness and light. It was Samuel Goldwyn who said: *“I don’t want any yes-men around me. I want everybody to tell me the truth, even if it costs them their jobs.”* It’s a tricky job making sure that you can work effectively with your boss, but it is possible; as the old saying has it – the secret of walking on water is knowing where the stepping stones are.

## The good, the bad...and yours

It is possible that your manager is a nightmare. Their most constructive comment may be to say things like: *When I want your opinion, I’ll give it to you.* Your most flattering comment about them may be to say that: *Their indecision is final* and when you get a response from them it may be no more than the ubiquitous: *Leave it with me*, followed by silence.

Perhaps the first question to ask about your manager is – *Can I work for them?* A poor manager may be a good reason to move on. Here however we will take a more constructive line and assume that either in the short term or the long you are going to work with them. If so you need to work at the relationship.

**TIP:** Unless you can influence senior people there is a danger that your job will never be more than reactive; to some meaningful degree you need to be in the driving seat of the relationship.

## Overall intentions

The overall intention here with regard to your working relationship with senior people, and your manager in particular, is just as it should be for you in your own job. It is to:

- **Do** those things that get you noticed, taken seriously and appreciated
- **Not** to do things that make people think less well of you, and therefore rate less highly suggestions you make or initiatives you take
- Be **able** to tackle effectively the individual things that need to be done to gain approval, acceptance or agreement to what you want from your job (and also for your career).

In this little book we consider how to make your relationship with senior people *constructive* and *useful*; and consider how to influence such people thus allowing you to do your job more effectively and to get more satisfaction from it.

**TIP:** A first principle is first to impress, then to influence.

### What makes a manager?

First things first. Managers may be concerned with productivity, efficiency, effectiveness, financial measures such as profit or return on sales and more. To be successful they must deliver, and to do that they must work at the six key areas of management: planning, organising, recruitment and selection, training and development, motivation and control.

Such people may need a variety of resources to make this possible – but one factor is common: people.

Let's define the process. Management can be simply stated, it is *the achievement of results **through** other people, not for them*. A manager's greatest asset is therefore their people. They cannot do everything themselves and they stand or fall by the success of their team. As management guru Peter Drucker once said "*The basic task of management is to make people productive.*"

**TIP:** It is in your manager's interest as much as yours for you to work effectively together; that fact is the starting point to your success in "managing them".

### How a good boss can help

Given the role of the manager, a good manager can be your greatest asset. They can:

- Help you succeed in your current job
- Develop your competence and skills
- Prepare you for more responsibility
- Specifically help you move on – and up
- And make your working time satisfying, rewarding, – even fun.

All you have to do is make sure they do.

### Your manager: what you want

Let's be clear here. Some factors you obviously want:

- **Positive ones:** being fair, clear in communication, trusting of you and prepared to give responsibility, good at delegating, good at their own job, decisive, consultative etc.
- **Negative ones:** *not* being secretive, prepared to spend time with you, supportive, trusting of you; or nit picking at a low level of detail, being dictatorial or resistant to change etc.

Some factors are of overriding importance. In many surveys the factor that comes out top as what people want from their bosses is for them to be *someone I learn from*. If a job is not to be endlessly repetitive, then this makes good sense. It leads to change, creativity and new challenges that benefit all – not least the organisation.

**TIP:** You should regard such factors as being akin to objectives. Think through what you want to promote as an ideal situation and regard influencing matters in the right direction as an *active* process.

### **Your boss's requirements of you**

Essentially this is simple enough: they want you to do a good job.

You must know what this means (see also Chapter 2 about job descriptions), and you must appreciate what they think makes it possible.

How self-starting do they want you to be? How active in taking the initiative? How creative? What about your time management, productivity, effectiveness and efficiency? Do they expect you to be good with people and communication, or to deputise for them on occasion? And what do they **not** want? Certainly they do not want you to be unnecessarily time consuming to manage or present particular difficulties.

Think this through and have a clear view in mind. Not sure? The answer is again simple – **ask**. Either when you first work with someone, or perhaps following some change, request a chat to sort things out for you both.

Unless you are clear what you want and what is wanted of you, seeking a good relationship with your boss is always going to be akin to fumbling in the dark.

### **What working effectively together can achieve**

You need to work with senior people in the right way. That means in a way that *they* find that they are content with (rather than just the way that they *think* it should be). Thus how you work should be a way resulting as much from your initiative as from their instruction.

The results of so doing are many and worthwhile. For example, your boss is then more likely to:

- Trust you (and check up on you less)
- Consult, listen to and give credence to your ideas
- Delegate to you
- Interfere (nit picking details, for instance) less
- Be reasonable (thinking things through with you, rather than just saying *Do this* and sticking on the first deadline that comes to mind)
- Support you (in what you do and with others)
- Reward you!

You may be able to add to this list – and target what you particularly want to occur.

Ultimately what works best works for both parties; albeit it may do so in rather different ways for each person.

### **Discovering the best ways of working**

Of course, people all differ and certainly different people work in different ways. You need to discover what way of working suits you and your boss as a team. Ask, but also experiment. For example, should you:

- Be enthusiastic about them and their plans?
- Praise them (you like being motivated, after all)?
- Be seen to put the job first?
- Involve them in the social life of the office?
- Keep them informed, be their eyes and ears (but not their spy)?
- Aim to share decision making?
- Generate ideas (good, practical ones)?
- Offer opinions openly and often (good, considered ones)?
- Show you can be trusted (to get things done, to keep a confidence)?
- Only ask for help when it is clearly needed (e.g. not twice with the same problem)?
- Get agreements and plans in writing?
- Deal with matters at a formal meeting (which you request) or “on the run”?
- Discriminate accurately between what is important and less so?
- Take a long term or short term view?
- Act as a reminder for them?

The answer in each case, and to other questions no doubt, needs thinking about. While in some cases the answer will surely be yes, in others a particular manager may not like or want it.

**TIP:** It is wise to adopt a horses for courses approach and balance what you want with what they want, and with what is possible. A little compromise is most likely necessary to help produce a mutually satisfactory solution.

**What about the prevailing culture in an organisation?**

All organisations vary. There may be a culture that favours good relationships. Time for consultation, consideration of others, and a creative and group approach to things is the norm. In the worst kind, secrecy predominates, pressure prohibits consultation (though it might help reduce it) and things are generally more difficult.

You may have not a “difficult” boss, but one who is unable to resist a culture that is essentially unconstructive. This leaves you with three options:

- Work to change the system, making it easier for your boss to work with you (maybe a long and difficult struggle)
- Work with your boss to, if not to change the system, to create an exception (best be open about this and see what the reaction is)
- Work to find a new job (you may conclude that the combination of a difficult boss and an unsympathetic corporate culture is simply incompatible with what you want in your career).

**TIP:** Whilst easy answers cannot be guaranteed, you can, however, adopt a *realistic* strategy that can pay off in the longer term.

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## 2 A Relationship That Works

The right relationship with your boss is vital. Such relationships are not necessarily good and certainly good ones do not just happen. As Hector Breeze said: *“I like your qualifications Gribson – you have the makings of a first class underling.”*

### 2.1 Creating continuous practicality

The right working relationship benefits both parties. It is worth working at getting it straight, getting it agreed and, over time, keeping it up to date as things change.

Overall it should be:

- *Straightforward*: (you should always know how to approach things, for example what needs prior discussion and what can simply be actioned)
- *Open and trusting*: (time and effort will be wasted if either party is trying to double guess the other)
- *Linked to clear objectives*: common approaches and with responsibilities, targets etc. documented where necessary
- *Well defined*: This includes a clear definition of the boundaries between jobs and tasks and responsibilities. And clear rules (some are necessary and should be respected). By all means campaign to change them, but ignoring them or arguing about them causes problems and, worst of all, will mean a manager is less prepared to consult and discuss things that matter more)
- *Two-way*: the arrangement should arrange how both parties operate and interact (not just how you relate to your boss)
- *Mutually beneficial*: in other words it works for both parties, though each may have different agendas and objectives.

**TIP:** A good relationship – one that works – encourages more trust and will tend to mean your responsibilities increase, which in turn gives you the opportunity to show what you can do and thus increase the trust...enough.



## 2.2 Defining your job

You are never going to make what you do impressive if you are not sure what it is you are supposed to be doing. Your job description (in the U.K. virtually a mandatory document linked to employment legislation) is not just a formality necessary only because HR says so. It should be a working tool that acts as an aide memoire between you and your boss. So:

- Make sure that you have one
- Check that you agree with what it says
- Ask for clarification about anything that is not clear
- Ensure your boss considers it reflects real life too
- Review it regularly and make sure it is, and stays, up to date.

If you are to have a good working relationship with your boss then the last thing you want is to have “I didn’t think that was my job” type discussions.

Your job description and what it says forms a solid foundation from which to make sure that what you do impresses.

## 2.3 A Sound Working Structure

You cannot influence anyone on a regular basis with an ad hoc approach. You need a sound basis – a routine and a structure.

This premise is easy to adopt, but then demands two things:

1. **That you think it through.** *You* need to take the initiative and think about what factors constitute a sound working arrangement. You can do worse than list them.
2. **That you make it happen.** Again that you take the initiative for creating and agreeing the appropriate basis – and making it stick.

**TIP:** Any shortfall here will dilute your efforts to work effectively; if you cannot get precisely the arrangement you want first time, keep on working at it.

For instance:

- Adopt a routine especially regarding how you communicate and how and when you have meetings
- Ensure regular communication (of all sorts, but especially face to face meetings) and get sufficient time together to agree matters between you
- Make sure that project timing is agreed, and particularly that check points or progress meetings are scheduled in advance (by stage if not by date)
- Agree also the nature and style of all the above: for example what exactly is a progress meeting? How long is it likely to be, should it be preceded by an agenda or written report and if so what level of detail is involved?
- Make sure that such practice relates appropriately to tasks (that it is what is needed to get the job done) and to the people (so that both parties feel comfortable with it)
- Address both long and short-term issues. Think about what is needed day to day, right through to annual matters (like planning or appraisal).

Defining a good working methodology is one thing, achieving it is another. Certainly it will not just happen (unless you have an exceptional manager). So you need to be prepared to think it through, and see it as something on which you can take an initiative.

- **Ask:** ask when necessary for the opportunity to discuss it and have some ideas ready (either this can be approached overall, or – better with a less approachable manager – focussing on one issue, a project perhaps, initially)
- **Suggest:** put forward ideas, offer suggestions, say what others (chosen because they will be respected) do. Discuss, negotiate, request a test (plead?) – but get something agreed, even if it is a starting point (or test basis) that you return to and refine
- **Action:** take the initiative and act assumptively. In other words just do it. For example, as a project starts set out a timetable in writing scheduling progressing meetings and send it without comment, put (or through a secretary get put) the dates in the diary, send an agenda ahead of the times and appear ready for the meetings. Senior people may actually find this useful (maybe to the surprise of you both!)
- **Match their style:** finally, as you approach this bear in mind the kind of person they are. What will suit them? Aim high by all means, but, if ultimately some compromise is likely to be necessary, plan what you might do. For example, attitude to detail is important here. Your manager may be a “*put it on one page*” kind of person, or want every i dotted, and every t crossed. A well matched case has the best chance both of being agreed – and of working.

**TIP:** Start as you mean to go on, suggest something practical, act to get it agreed and make it work so that they will want it to continue.

## 3 Creating A Positive Profile

Here we look at a vital part of the process; yet one easily overlooked. As John Huston said: *“Nothing succeeds like reputation.”*

### 3.1 Perception is reality

The heading above is a maxim from the advertising industry. It's true. Certainly how you come over matters. It was Oscar Wilde who said: *Only shallow people do not judge by appearances*, and you should take note of that principle.

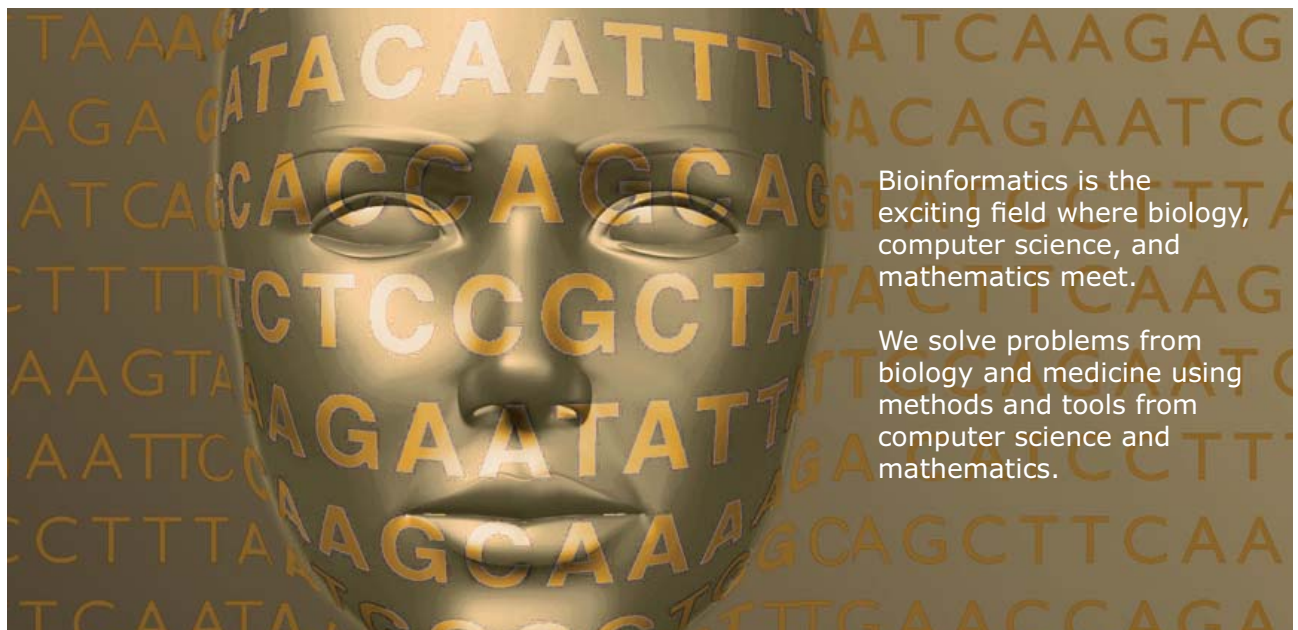
Are you a force to be reckoned with? If you say *I think we should do X*, does your manager and other senior people listen or just say: *What would they know?* You need to be positive about yourself and you need to cultivate a “professional” image.

But what exactly is professional? It is, like beauty, largely in the eye of the beholder. How do your own manager and others view, rate and judge people? You need to think about it and adapt accordingly.

Remember this maxim if you hesitate to spend some time and thought on this area – *if you look like a doormat, then in all likelihood people will walk all over you.*



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### 3.2 Your prime objectives

Be in no doubt: there is one key reason to worry about your profile. Your power to influence is directly effected by how you are seen. Your manner, appearance, way of working and how you conduct yourself all contribute to how you are seen.

You have some key objectives, including being seen as:

- Competent
- Confident
- Credible.

Further factors are important too – being “professional” – but those above are especially important to influencing. You need to decide just how to interpret each given your own situation.

**TIP:** Create a firm foundation of acceptance for your management up the hierarchy and individual factors will always be easier to achieve.

### 3.3 The people to impress

Consider who actually constitutes your “target group”. Think about it; be clear. Make a list. It will probably include:

- Your immediate supervisor or manager
- Their immediate manager
- Other senior people with whom your work involves you (in other departments or functions, perhaps)
- Senior people your employment involves you with (adding people like HR managers and trainers)
- “Gatekeepers”: a group consisting of those who prevent or allow easy access to others (such as a secretary or assistant)
- “Communicators”: a group who can communicate news or opinion about you (these may range from the office gossip to whoever runs an internal newsletter).

Such people may interact with you a good deal, others may be worth forging stronger links with. All are in a position to influence how your boss will work with you because their opinion of you comes, in part, from these people.

**TIP:** Make sure that messages passed back are positive and as you would wish them. Use these channels actively; indeed do so systematically.

### 3.4 Your best image

Your “ideal” image is something you should define. What qualities must be in evidence before you are seen as “professional”? Such surely include your being:

Effective, reliable, interested in what you do, responsible, experienced, expert, discrete, thorough, careful, creative, a good communicator, approachable, well prepared and organised and might, depending on the organisational culture, also include others such as being respectful or ethical.

You should be clear what is right for you and see them in three categories:

- Your inherent qualities, those that shine through and need no great attention (such may be an ongoing part of your work and always in evidence)
- Qualities that need strengthening (e.g. if being a good communicator is important, maybe the first step is to improve, say, your report writing style)
- Qualities that can benefit from some, what is the right word? – *Exaggeration*.

In other words, making people aware of how you operate and what you have to offer is an *active* process.

In addition you should note two additional points:

- One caveat: do not overdo things here. You do not want a reputation of being unpleasantly “pushy”. But this is not what is meant here. For example, you might decide that being seen as someone who gives attention to detail is important (maybe with certain people or projects). The way to do this is not to say so, it is to *show* it. If this goes beyond your natural tendencies then you may need to enhance the ability and exaggerate it somewhat.
- Finally here, you might also list and work on in a similar way characteristics that you should avoid and *be seen not to embrace*. For example, few managers appreciate time wasters, whingers or people who spend half their office life engaged in office politics or on the internet.

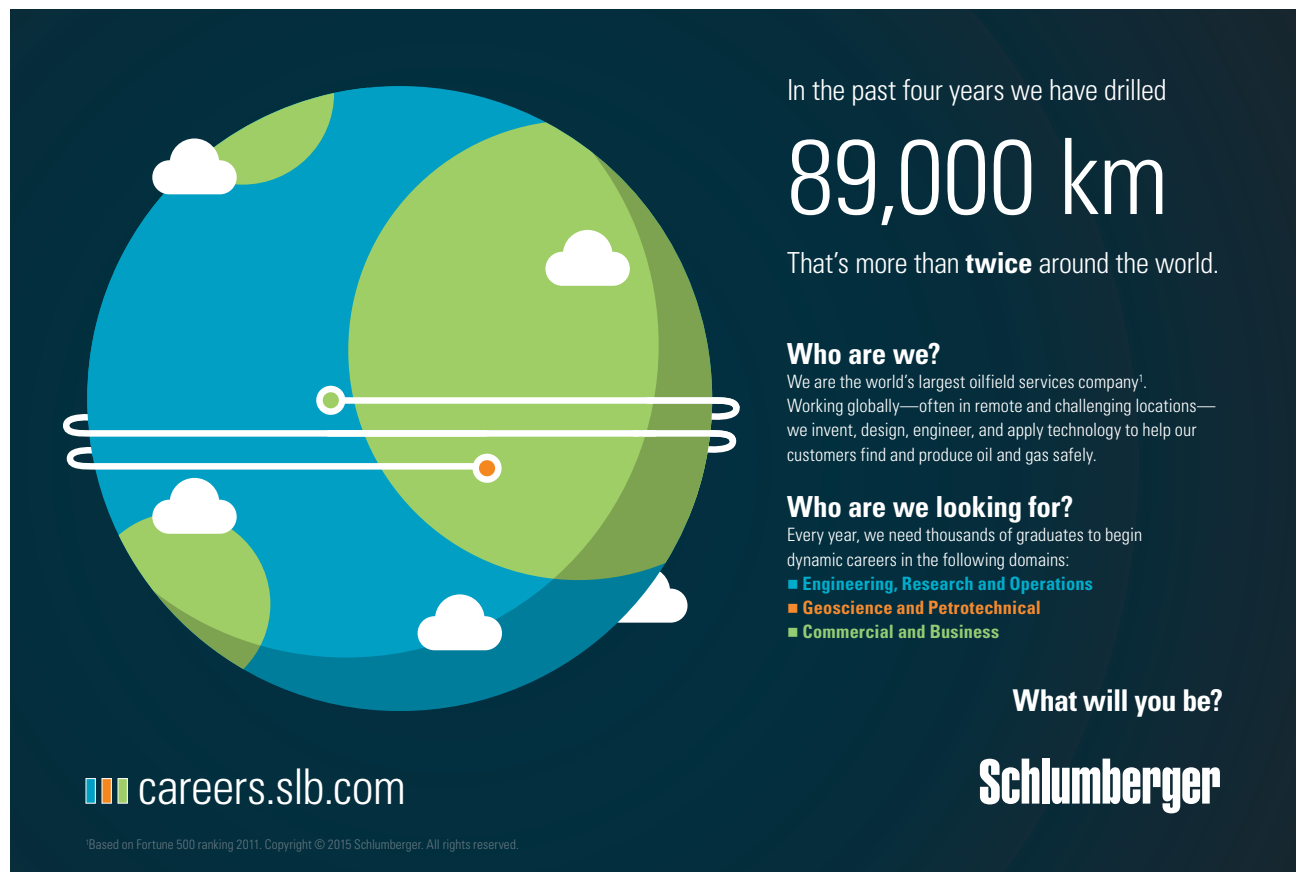
## 4 Actively creating positive impact

Do bear in mind what Robert Benchley said: *“Anyone can do any amount of work, provided it isn’t the work they are supposed to be doing at the moment.”*

### 4.1 Ready, aim – fire!

In order to establish and maintain a good working relationship with your manager you have to be seen as effective, thus you must actually *be* effective – and to be effective you need to aim at the right things. This means:

- Being clear about your aims and responsibilities (the comments about job descriptions earlier are relevant here)
- Understanding – and hitting – specific targets that may be part of your remit (never underestimate the importance of doing this)
- Delivering – doing what is expected of you (and doing more than is expected has even more impact – delivering with a capital D)
- Your performance being trouble free, and being noticed (and here it may be that your boss should be aware not only that you have succeeded, but of the details: that it was on time despite unexpected problems, that you carried other people with you; whatever).



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**TIP:** Never confuse activity with achievement. No manager will be impressed, or easier to deal with, just because they know you are “busy” – it is results that matter (not least because your results reflect on your manager).

## 4.2 Positive, specific action

There are times when managers seem to notice *nothing*. Ultimately, however, achieving goals does have impact. So too do the ways in which you work, for example normally it pays to:

- Be thorough, with all the details accommodated and no loose ends
- Be consistent and reliable, so that you get a reputation for “delivering” (this alone can put you at the front of the queue when interesting, and important, projects are allocated)
- Match with your manager, reflecting their requirements and concerns while adding in your own
- Have the right attitude. It is probably best to be interested, maybe even enthusiastic, about most things. Though you do not want to become a dumping ground for unwanted work – *Patrick never complains* – so a balance is necessary.

But whatever else, *enthusiasm is infectious* (and those described as *fired with enthusiasm* might just be so called because they did *not* exhibit it).

NOTE: it is worth noting that, while things must be done right, excessive perfectionism can sometimes achieve little and waste time.

## 4.3 Work essentials

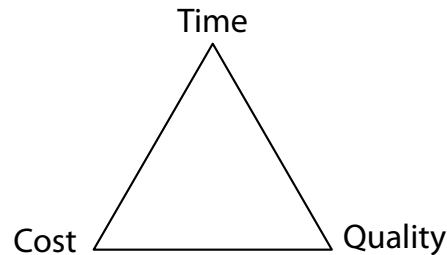
Three things are of overriding importance if your work is to impress, these are that it should be:

- **On spec:** having a clear brief has been mentioned – the first thing to deliver is *exactly what was agreed or asked for*. If there is a difference it should only be a positive one (but even that might collect a reprimand if other things were more important)
- **On time:** ensure you meet any deadline (provided it is agreed and possible – never be railroaded into agreeing impossible deadlines, the only response to your saying – *I told you it was insufficient time* – will be to be told that *Then you shouldn't have agreed the date*. Yes, unreasonable, but that's real life – rarely will people say: *I should have given it more thought*)
- **On budget:** money matters more than many things in organisational life. Try not to get into a position where agreed budgets are exceeded (or planned cost reductions missed). Creating pleasant surprises in this area will be noticed, but beware of setting precedents.

**TIP:** Do this and do it consistently and any manager is going to regard you as someone of whom to take notice.

#### 4.4 Establishing a balance

Linking to the previous heading it is worth bearing in mind a juggling act that applies to many things. Imagine, in the chart shown below, that the lines are elastic.



Three elements – time, quality and cost – may always be a compromise; for example, spend less and quality is reduced (as it says in one American management book – *they didn't want it right, they wanted it Wednesday*). Get the balance right – something else to ask about and agree perhaps – and the out turn of what you do will be more secure.

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If you fail because of lack of thought or effort then you have only yourself to blame. You must:

- Do the necessary groundwork. Carefully check facts and figures, consider the details, do any research that puts you in a position to complete the task satisfactorily
- Ask others where necessary (informally as much as any other way – a good networking system helps everyone)
- Ask your manager for any necessary support. If they must be involved at some stage, or if they need to give permission for you to access files or set up discussions with people who are *their* colleagues – get that organised.

Experience changes things. Fail to ask for support or talk to the right person and the project may fail. Do it and not only is the project successful, but next time you will be that much more self-sufficient.

**TIP:** Running before you can walk or with the wrong shoes can only trip you up. Organise yourself to be successful.

## 4.5 Here's an idea

Managers are not paid to have all the good ideas that keep their department (company or whatever) running successfully. However, they are paid to *make sure there are enough good ideas to do just that*. Where do they come from? A sensible manager will regard the best source of ideas as their people who – separately or together (two heads are better than one) – can contribute.

Thus if you are one of those who does contribute, indeed can become one of those who can be relied upon not only contribute when asked, but to take a lead – this can only help position you so as to make achieving other things easier. So if you think you can contribute in this way (surely you can!) then:

- Think through a suggestion thoroughly (to the extent of doing any research or checking that may entail)
- Suggest it, and suggest it in the best possible way. Will a chance remark do? Should you introduce it in a meeting (where others may lay claim to it)? Does it need a written note?
- Be prepared for rejection. However creative you are not every idea will be right or possible to implement and this may well be because of facts outside your knowledge. But the only way to get some ideas accepted is to stick your neck out.

**TIP:** The only way to get a nil rejection rate is never to put forward ideas; and this is *not* the way forward. In most jobs an element of creativity is essential to success.

## 4.6 Adding power

What else? Beyond delivering (with a capital D), in addition, you should:

- Undertake some internal public relations – albeit judiciously – to tell people that you are effective
- Associate yourself with success (for example, associate with successful people, perhaps some more senior ones and certainly not with the office gossip or troublemaker)
- Use success to secure new challenges, not just asking to be involved but quoting other experiences – *Now that I have...an involvement with X makes sense*
- Be generous to others who you work with: claiming *all* the credit when manifestly others contributed is rarely acceptable.

The combined effects of such strategies can enhance your standing sufficiently for you to achieve more of what you want.



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# 5 Successfully Communicating With Senior People

Hierarchies can be difficult. As Dwight Morrow said: “*The world is divided into people who do things – and people who get the credit.*”

## 5.1 First things first

The hierarchies in organisations have to mean something. Current trends may be towards flatter organisation structures and more informal styles, but senior people are, well, senior. There is something of a balancing act to be done therefore, and you need to:

- Cultivate friendly relationships
- Maintain an appropriate degree of respect and distance
- Create a good *working* relationship with people (almost every aspect of this text comes back to this).

Balance respect with involvement to create appropriate positioning on the hierarchical ladder and it will serve you well.

So, assuming that you are relating to people in the right sort of way, another important overall factor is *timing*. Let's think about two different possibilities:

1. **People communicate with you.** One philosophy follows the old adage that if a senior person says *Jump!* Then the only response is to ask: *How high?* But is this always right and do senior people always expect it? There are certainly occasions when the right reaction to a “summons” is to stall. You may want to finish something more important (or let them decide which is most important) or to have time to prepare for whatever the discussion will be about.

**TIP:** So, be prepared to stand up for yourself; be polite but be prepared to be firm (you may not always succeed, but you may achieve a surprisingly good rate of strike).

2. **You communicate with others.** Here one rule is clear: *Always choose your moment – carefully.*

Again there is a balance to be struck. Insist too much – *But I must see you today!* – And, even if they agree, you may find that you have given yourself a very difficult meeting (time is short and their mind is on other things). Leave things too long and the moment passes, the project has run on too long or, perhaps worst of all, the problem has got worse. In the latter case you are on a hiding to nothing, saying: *But I've been trying to get to see you for days* only makes matters worse. And a response such as: *If you'd told me what it was about then I'm sure I would have set a time* also just puts you in the wrong.

## 5.2 Choosing the best moment

However, when you have their full attention, when they feel the meeting (or indeed any other form of communication for that matter) is necessary, appropriately set up and likely to fit in with other things they are doing – then you are more likely to get a good hearing.

But – you must be realistic. Offices are busy places. You might want an hour with someone, but is this likely to be agreed or if it is will it be resented? Compromise if necessary, but make the compromise work.

So:

- **Consider timing carefully.** Even in small ways timing always needs thinking about. Do you interrupt that meeting, stop them on their way out of the office or set a special session?
- **Plan, and schedule, ahead as far as possible**
- **Stick to time.** Always be on time for meetings. Always set a start and finish time for meetings you set or request. And give reasonable notice whenever possible. Some things are inevitably emergencies; but do not cry wolf (again little things can be important, if your every e-mail carries a priority symbol it may quickly annoy and will certainly be ineffective).

## 5.3 Making meetings work for you

Ubiquitous they may be, but meetings are much maligned (*Meetings are indispensable when you don't want to do anything*: J.K. Galbraith), but many are necessary. If you “work” them well they can play a prime part in allowing you to influence things. Certain things are important:

- *Prepare*: read papers circulated in advance, note the agenda, think about what you want to say
- *Look the part*: especially in terms of being well organised
- *Clarify*: never participate in discussions if you are not clear about the objectives – ask for clarification (there is no harm in being seen to have things straight before making comments)
- *Handle the discussion*: for example, judge well when to speak and when not



- *Communicate effectively*: preparation helps, but in a meeting, with time pressing, it is important to be “precise and concise” and, above all, clear
- *Obey the rules*: be on time, respect the Chair, observe any formalities and conduct yourself reasonably and courteously
- *Read between the lines*: peoples’ motivation may be disguised (or their intentions negative or destructive) – watch out for any office politics
- *Display some clout*: be prepared, and ready, to fight your corner, dig your heels in or challenge others and when you do so do so with a well argued and well supported case – and with confidence
- *Maintain flexibility*: be prepared, but not locked into a position – meetings are a forum in which you must be quick on your feet
- *Make clear notes*: always be sure you know what has been said, what has been decided – and what action is required of you
- *Follow up*: action matters agreed, as agreed (you do not want to be the one shown up at the next meeting as failing to implement action points).

There are skills to develop here, meetings can be a stage on which much of your upward management can be played out successfully – use them wisely and carefully.

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## 5.4 The power of listening

No senior person wants misunderstandings. They do not want to hear: *I'm not quite sure what you meant...* and they do not want any confusion resulting from their contact with you to waste any of *their* time.

As a result it is important to:

- **Listen:** really listen (see checklist shown below)
- **If in doubt, ask:** and do so immediately (going back at the end of a meeting and querying something casts doubt on your total understanding)
- **Recap if necessary:** a quick statement – *so this means that...* – can clarify rapidly and is noticed as nothing except being sure
- **Make notes:** get the habit of doing so quickly and accurately (and maybe checking them *immediately* after a discussion, filling them out somewhat while things are fresh in your mind).

**TIP:** Remember that few skills are so appreciated by senior people. If you listen to get things right and get them right first time – your ability to influence is automatically enhanced.

### CHECKLIST

**Make listening an *active process*.** The checklist shows how, you should:

- *Want to listen:* this is easy once you realise how useful it is to the communication process
- *Look like a good listener:* people will appreciate it and, if they see they have your attention, feedback will be more forthcoming
- *Understand:* it is not just the words but the meaning that lies behind them you must note
- *React:* let people see that you have heard, understood and are interested. Nods, small gestures and signs and comments will encourage the other person's confidence and participation – *right?*
- *Stop talking:* other than small acknowledgements, you cannot talk and listen at the same time. Do not interrupt
- *Use empathy:* put yourself in the other person's shoes and make sure you really appreciate their point of view
- *Check:* if necessary, ask questions promptly to clarify matters as the conversation proceeds. An understanding based even partly on guesses or assumptions is dangerous. But ask questions diplomatically, do not say "You didn't explain that properly"
- *Remain unemotional:* too much thinking ahead – *however can I overcome that point?* – can distract you
- *Concentrate:* allow nothing to distract you

- *Look at the other person:* nothing is read more rapidly as disinterest than an inadequate focus of attention
- *Note particularly key points:* edit what you hear so that you can better retain key points manageably
- *Avoid personalities:* do not let your view of a member of staff distract you from the message
- *Do not lose yourself in subsequent arguments:* some thinking ahead may be useful; too much and you may suddenly find you have missed something
- *Avoid negatives:* to begin with clear signs of disagreement (even a dismissive look) can make the other person clam up and destroy the dialogue
- *Make notes:* do not trust your memory, and if it is polite to do so, ask permission before writing their comments down

Listening successfully is a practical necessity if you are to excel at your own communication with senior people. The saying that *we were given two ears and one mouth for a good reason* should never be forgotten.

## 5.5 Earning a hearing

Quite apart from having something worthwhile and interesting to say, and making sure that you do not distract (by being obtuse or verbose for instance), here is a true golden rule:

*Never try to compete with an interruption.*

You may be in full flight – your pet proposal is going over a storm – but whatever may interrupt – *always* pause. It may be the telephone, a visitor, or just the office tea lady on her rounds. It may even just be a moment's apparent distraction for no good apparent reason. No matter – whatever the interruption is:

- Pause, and do so at once
- Acknowledge what you are doing – *I'll just wait while...* and do so assumptively as if it is as much in their best interests as yours
- If necessary (for example when the interruption persists – e.g. an unscheduled visitor stays on, and on) suggest an alternative (but get something specific agreed – *Let's meet again at 3 p.m.* not just *later*)
- Recap as you restart and be sure that nothing has been missed.

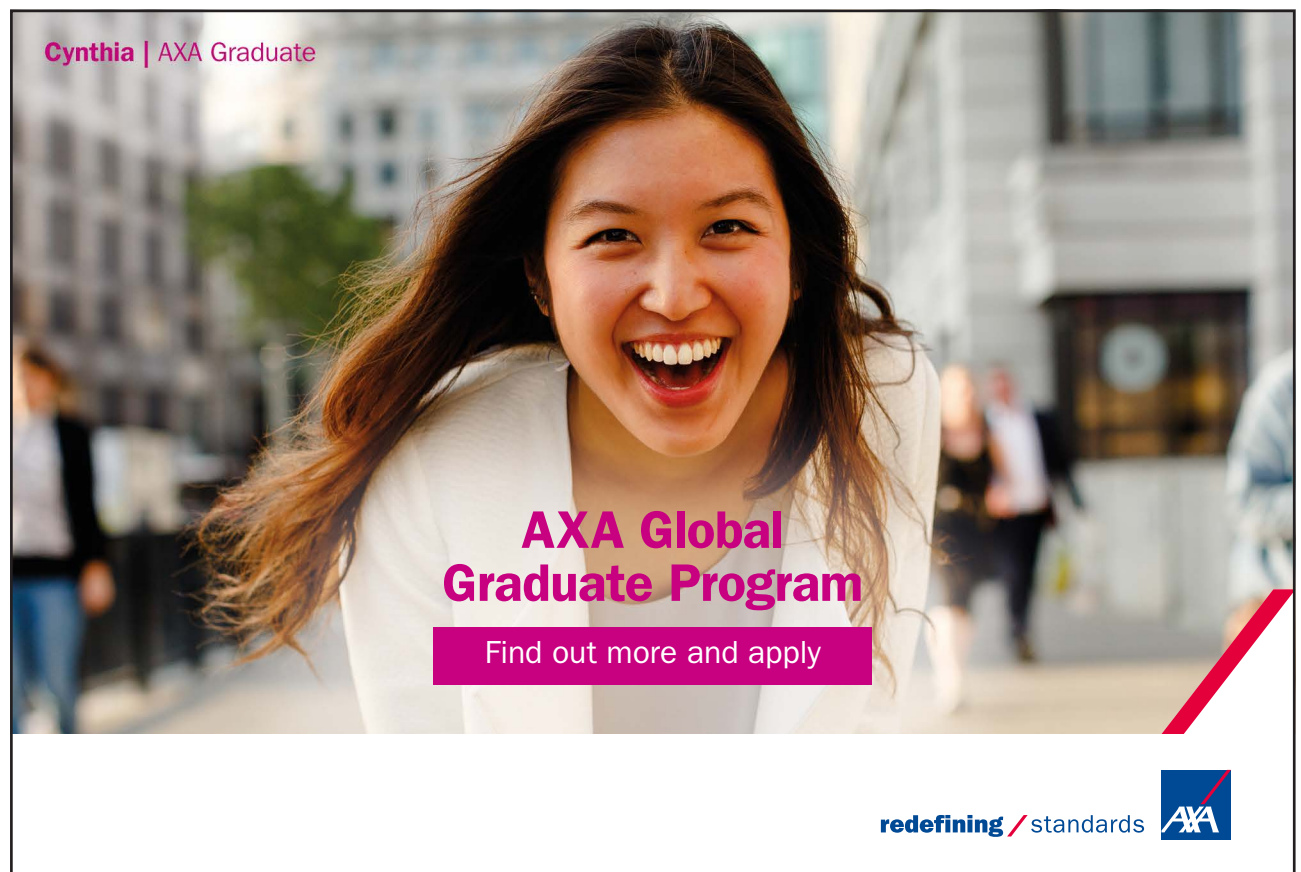
**TIP:** Never forget that no communication will impress if only a part of it is actually heard.

## 5.6 The power of being assertive

Alongside persuasion, it is also necessary to adopt an assertive approach and make it acceptable. Be careful not to be too strident (it can give the wrong signals, e.g. desperation), otherwise:

- *Have the courage of your convictions:* only a well prepared case can be presented this way
- *Stick to your ground when challenged:* and back up what you say with facts
- *Avoid circumspection:* do not say *perhaps we should...* when you mean *we should certainly do...*
- *Use tone and manner to reinforce your intention:* look and sound as if you mean business
- *Do not be put off with bluster:* treat a smokescreen as exactly that
- *Keep any argument objective and businesslike:* avoid emotional pleas or reactions.

Being assertive only means adopting a planned, positive way of putting over a strong case. Senior people will expect you to do so and will respect you for it.



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## 6 Securing Agreement From Your Boss

This is another important topic. Abraham Lincoln had it right: “*When I am getting ready to reason with a man, I spend one third of my time thinking about myself and what I am going to say; and two thirds thinking about him and what he is going to say.*”

### 6.1 Initial principles

The way to get what you want can be just to ask. If the request is sensible, the result likely useful and the relationship with your manager good, then this may be sufficient. If not, remember two things as a preliminary to everything else you do:

- Do not just ask, *persuade*
- Do not give up, *persist*.

Being persuasive requires particular skills (investigated over the next few pages). Persistence at least is easy (though do not become a complete pain) and it should never be underrated – as just one more attempt may be the successful one.

You doubt it? Well, just think about being persistent, go on think about it, I really want you to, go on do it now – read the next page (then I’ll stop insisting).

### 6.2 The gentle art of persistence

Bear in mind that the difficulties here are largely psychological. It is difficult to raise something again when you have been put off several times (*Leave it for the moment – I can’t do anything until after the budget period ends – He’s in a meeting*). So:

- Continue contact until you are firmly told “No” and take everything else at face value (so, if you are told – *after the month end* – assume it means just that)
- Ring the changes on method – send a note, then telephone, then raise it at a meeting
- Remember that some methods are better reminders than others (a telephone can be forgotten in a short time and an e-mail can be deleted in a second)
- Find a creative approach if possible.

Some things need multiple contacts over a comparatively short time, others need patience and a resolution to raise something at the right moment.

### 6.3 Helping them decide

Consider what happens when you ask your manager to agree to something? Assuming they do consider it, then it helps to understand the way their mind works. Effectively people move through several stages of a common thinking process, thus:

- **I matter most.** Whatever you want me to do, I expect you to worry about how I feel about it, respect me and consider my needs (this immediately rules out, sometimes instinctive, egocentric approaches)
- **What are the merits and implications of the case you make?** Tell me what you suggest and why it makes sense (the pluses) and whether it has any snags (the minuses) so that I can weigh it up; bearing in mind that few, if any, propositions are perfect
- **How will it work?** Here people additionally want to assess the details not so much about the proposition itself but about the areas associated with it. For example, you might want agreement to take on, or become involved with, a project. The idea of the project might appeal, but say the timing is coincident with something else, then if this is important the clash might appear to be a minus and, if the case is finely balanced, it could be rejected because of that, rather than because of its individual merits
- **What do I do?** In other words what action – exactly – is now necessary? This too forms part of the balance. If something seen in a brief description of this book persuaded you that it might help you, you may have decided to read it. In doing so you recognised (and accepted) that you would have to read it and that this would take a little time. The action – reading, and the time it takes – is inherent in the proposition and, if you were not prepared to take it on, this might have changed your decision.

Only after this thinking process is complete will people feel they have sufficient evidence on which to make a decision. They have the balance of pluses and minuses in mind, and they can compare it with that of any other options. Remember your suggestions often relate to other things; if a cost is involved, for instance, on what else might the money be spent? Remember too, some choices are close run with one option only just coming out ahead of others.

It is this thinking that enables a decision to be made; and for someone to feel they have made a sensible decision, and done so on a considered basis.

**TIP:** It helps to see what you need to do as assisting their decision making process (albeit towards your intended end).



## 6.4 A persuasive formula

The fact is that people do not agree to ideas or plans, they sign up to the results of actions or ideas. The key concept to use here differentiates between what are called *features* and *benefits*:

- **Features** are the factual elements of something
- **Benefits** are what it does or means to someone.

A crucial factor in achieving agreement is in *talking benefits*. You need to spell out the advantages in specific terms, leading with benefits, stressing those benefits which make the strongest case and using features to back up the argument.

Because this concept is so important, let us examine an example: imagine wanting to change a system of some sort (details do not matter). You are sure what you have planned is an improvement. It is less complicated, it can be computerised (rather than being done manually), it is flexible and simple to administer.

*Are these factors features or benefit?*



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They are all features. What does “being less complicated” mean? (It might mean less thorough). How does running the system on a computer help? What does *flexible* mean for goodness sake? A useful umbrella term perhaps, but it needs spelling out. Even good sounding words like *simple* fail to do the case justice. If simple means that it can be implemented at lower cost by a lower level of staff, saving money and freeing up other people for more important tasks – then that needs saying.

**TIP:** *Benefits* come first, *features* demonstrate how benefits are possible –that’s the way to use them.

Benefits come in various forms, so in searching for points to strengthen a case look for benefits:

- *To your manager in their work capacity:* for example a benefit that means adopting your idea will improve the productivity of the department
- *To your manager as an individual:* here a benefit might be something that made life easier, reduced worry, or gave them more time
- *To other people (with whom you manager is concerned):* this might mean something that affected their own boss or others in the team or organisation.

These are not mutually exclusive. You can look for and use a “package” of benefits from all the above categories.

**TIP:** If you select the right benefits, describe them clearly then you will have the basis of a strong case and make agreement more likely.

## 6.5 How to add “weight” to the argument

Two factors can be used to add additional weight to your argument:

1. **Proof:** that is any evidence *other than* what you say (this might be someone else’s opinion, the results of a test or trial, figures where appropriate) – all such add weight to the argument from a different perspective and make the time and effort of assembling them worthwhile.
2. **Thoroughness:** and this is meant in the broadest sense. An argument carries more weight when your manner is appropriate. When manifestly you have done your home work, when accompanying facts and figures are well explained, and when the way it is put over shows good preparation and presentation. For example, the quality of a presentation or report (memo etc.) may condition the response. A reaction may begin and end as a comment like:  
*What a rotten presentation, I bet it was a stupid idea anyway.*

If you always do justice to your requests, and give your argument suitable weight, then you enhance your likelihood of success.

Let's take a couple of examples of specific requests. In both, indeed, indeed in many such cases, the trick is to be objective, be factual – and stay calm.

### 1. SEEKING MORE RESPONSIBILITY/PROMOTION

There are two routes ahead. First, responsibility can be added piece by piece until the whole job is rather different. At that point changes may need formalising. Secondly, one can move straight to a significant change – a step up.

Both are integral parts of active career management. The piece by piece route is helped by such interim approaches as encouraging delegation and taking initiatives.

To get things formalised, the best approach should be objectively and factually based – not on an emotional plea – *but I've been here three years!*

Just one other thing to keep in mind. Most organisations are concerned about fairness (because it's, well, fair – and unfairnesses on staff matters can all too easily overlap into employment legislation). So, while you should not demand because of this, a need to be fair may appropriately be part of a reasoned argument.

### 2. SEEKING AGREEMENT TO TRAINING AND DEVELOPMENT

Training is generally seen as a good thing, but restraints on time and money may interfere. An old maxim quotes a manager saying: *What if I invest time and money training my people, and they leave?* The answer is another question: *what happens if you don't train them – and they stay?*

So, key ways to make your training suggestions acceptable include:

- Stressing the benefits – the way you will be able to BETTER perform your job after training (be as specific as possible)
- Focusing on results (not just *I will be able to write a better reports*, but *My reports will do a better job for the department*, spelling out *how*)
- Being practical: it is inherently more difficult to organise a month away than a couple of days at a seminar
- Offer proof (e.g. benefits experienced by others) and utilise the support of others where appropriate (the training manager, perhaps)
- Mix the topics of training – some specific and task based, others perhaps more career focused.

Approaches here must match any “good thing” you hope to get agreed.

# 7 Getting Over Difficulties

If only life was easy, but by and large it's not. The road ahead sometimes seems covered with difficulties. Dealing with them is not necessarily easy either. As H.L. Menkin said: *"There is always a well know solution to every human problem – neat, plausible...and wrong."*

## 7.1 What to do about the boss from hell

Bosses come in every shape, size and sort. Let us hope that yours is not irredeemable, but – like most – they probably have some characteristics that do make for some difficulty. Over the next few pages we look at some common "relationship-with-boss" problems; first consider some general points. In looking at a particular problem, you should:

- Identify the problem and try to ascertain *why* it is occurring (again just ask?)
- Do not overreact, especially simply with visible irritation
- Plan your response, and if necessary see it as a campaign and do not aim for an "instant fix" (which may not be possible)
- Approach it sensitively and use all your communications skill.

**TIP:** Remember bulls in china shops usually cause more damage than anything else – softly, softly may often be the (only) way.

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## 7.2 Communication to the rescue

Never automatically assume things are complicated. Sometimes problems are caused by sheer ignorance. Something is done unthinkingly, or for good (though ultimately inappropriate reasons), and can be corrected very easily. How? *You just ask.*

*Example:* I remember a case of getting regular information. It was necessary. It allowed me to complete a task I enjoyed. But its form was awkward and necessitated some sorting out. My boss had never asked how it should be provided, and it subsequently turned out that he honestly felt the current way was ideal.

*The answer?* A simple request – *I wonder if you could...* – backed with an example of how it could be better arranged, and a brief explanation about how that would save time – received instant agreement. A permanent change in practice (no additional effort was necessary to produce the information in the revised form) followed.

**TIP:** If something is not a problem, do not treat it like a problem (just act to make it easy to agree a change).

Already perhaps some principles are in evidence; let's now look at a number of potential problems and practical ways to approach them.

### 1. The secretive boss

First, accept that there are things that your manager knows that you do not, either because it is inappropriate or of no import (you could probably spend all day just exchanging details, after all).

If there *is* a habit you need to try to change, resist the temptation to gripe or complain vaguely. Rather:

- *Be specific:* discuss particular things where your non-involvement has caused problems
- *Gather evidence:* show why it affects you (other than being irritating) and what results from it
- *Emphasise the plus side:* spell out the advantages of more openness, suggesting “improved information flow”, rather than “stopping being secretive”
- *Involve others:* as such a habit may affect others similarly, get everyone to engage in the same sort of action to rub in the message.

Finally, do *not* respond in kind and be secretive yourself; your good example may help.

## 2. The “no delegation” boss

Ask yourself why they don't delegate. Recognise that there are many possible reasons (beyond sheer cussidness!) why a manager may be bad at delegation. If you can discover *why*, this may prove the first step to changing matters. Major reasons include:

- Fear that the process is time consuming (demonstrate that you can pick things up and take over fast)
- Fear that something will go wrong and they will be blamed (trust may remove this in time)
- Fear that you will do something *better* than them. Well so you might, perhaps you should describe it as being done differently rather than better; besides delegation should be a spur to change and improvement
- Hanging on to things which, although appropriate to delegate, they *like* doing (find them something else more important or more satisfying still for them to do).

Discovering the reason and dealing with that is more likely to change things than just a general complaint.

## 3. The interfering boss

This is a sign of the control freak and usually goes along with an inability to delegate. The only antidote is to *build up their confidence in you*, show them that all *does* go well even without their monitoring every moment.

Specifically:

- Supply progress reports or arrange discussions ahead of being asked
- Create regular continuity of contact; gaps will simply encourage unnecessary contacts
- Work to a plan you can describe (this says not only that all is well, but that it will continue to be so)
- Stick to the brief (later you can try to make changes, get their confidence built up first)
- Deal with checks objectively and factually and do not let your irritation show
- Be sure that you *always* can quote chapter and verse on what is happening *at any time*.

And be patient – this needs a campaign action to cure it.

## 4. The “no change” boss

As with not delegating, it may help if you can work out *why* this is occurring. If it is one major thing you may be able to tackle it. Maybe they are frightened of new technology (a problem often made worse by having younger staff who are not). If so, maybe you can help (pick something straightforward you know is a problem and offer help; maybe you can even become seen as a source of regular help).



Maybe they are just busy, stubborn or old fashioned, reacting against anything that upsets their existing ways, in which case other methods are needed.

Do not fight them, you will add stubbornness to resistance – you need to work with them. Three particular tactics may help here:

- When you make suggestions, **separate the process of change from the results of making the change**. What is feared or resented is often just the inconvenience of making the change – sell the results (benefits) and reactions may be different; minimise the hassle and the case is stronger still
- **Assist – indeed enliven – imagination**. Describe *how* it will be after a change and paint an attractive and truly descriptive picture
- **Always do the groundwork**. Make agreeing the change consist of saying yes to the results, not yes to a difficult process of sorting everything out.

All three make getting agreement easier. Afterwards (thinking of next time) do not try to take all the credit – even if it is rightfully yours! If they made a good decision, it does no harm to say so. You are a team, right?

Twas ever thus: *Change is not made without inconvenience, even from worse to better*. Samuel Johnson (1709–1784).

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## 5. The rude boss

It is possible that rudeness and abruptness may be intractable (and inherent to the individual); if so, while this does not excuse it, you may decide to learn to live with it, and assume no great harm is intended. Or its impact may be unintentional, or at least something that they are unaware hurts to the extent it does. If so then a simple request may suffice to prompt a change.

Failing that, then you have to mount a campaign. For example:

- Set a good example with your courtesies to other people (and prompt them also where possible, e.g. drafting a “thank you” letter for them to sign)
- Refer to behaviour linked to other people (*I know John’s secretary really hates being called that – if you used her proper name, I’m sure we’d get more co-operation*)
- Ask advice about related matters (*How do you think I can approach Mary about that without offending her?*)
- Ignore it, then make it clear what you are doing (*Sorry, I was sure you weren’t talking to me like that*).

If you wear them down in this way, they should eventually take the hint (they may even say *thank you!*).

NOTE: if the upset is *intended*, the same tactics may work. In bad cases you need to check why it is happening. For example, it could be an alternative to meeting some issue head on or signs of a deep incompatibility that makes you need to consider your future.

## 6. The “leave it with me” boss

Here the implication is that this is apparently helpfully said, but you never hear another word. The solution can be straightforward:

- Always ask for (better still suggest), and then agree, a follow up date so that you can check with them on that date rather than waiting for them to mention it to you
- Make this sound convenient to *them* rather than you (*to save you time, why not let me...*)
- Stress the benefits. Do not just go on about *your* situation, incorporate into what you say how compliance assists them
- Do not let it lie. If no answer is forthcoming on the due date, then set another (and, if necessary, another). Be persistent and try to link things to other timing (e.g. *let me check with you on 25<sup>th</sup>, we should have things sorted out before the end of the month, don’t you think?*)

- It may help to offer to get involved and take on part of any task involved (e.g. *why don't I get the figures out, then all you have to do is...and by 25<sup>th</sup> it should all be settled*)
- If you really need more ammunition as it were then consider making it public by referring to other people who are/seem aware of the delay (e.g. *I told John I could start X once I have this out of the way*).

With the worst examples of this the key is *persistence*. Knowing you will not forget or give up your reasonable approach should wear them down.

## 7. The no-consultation boss

This can be similar to non-delegation. The solution is to demonstrate how useful consultation can be – to them and to the operation. Yet it takes some time, and in a busy – pressurised – life this may be seen as a major problem.

The concept to persuade them of is that of investing time *now*, in order to save time later. You can start in small ways. And you can start by taking the initiative rather than just requesting that *they* consult. So:

- Ask – *can we take five minutes I think it would be useful if I understood...*
- Tell – *one possible problem with this new project is X, I've got a way round that I think, can we discuss it for a few minutes (there may be other ways I could help)*
- Demonstrate – if there are numbers of people involved report on the benefits of *your* consultations with others (down the line, perhaps)
- Consult with others – *I had a chat with James about X. It was very useful, but you are really the prime mover here, maybe we should...*
- Use small successes to build the habit. Show how well one thing worked and sell the benefits of “more of the same”.

If you are an effective person (would you be reading this if not?) consultation *will* be useful, and can also prompt creativity (two heads are better than one again). The trick is to get started and demonstrate the benefits so that your boss will *want* to use it more.

### 8. The “cover-for-me” boss

A tricky one: what do you do if your boss asks you to cover up for them? It might be work or private (e.g. the kind of subterfuge involved in hiding an affair). Leaving the odd white lie aside, for most people *not* being involved in such things is only right. Bad cases need addressing head on:

- Raise the issue formally and explain how uncomfortable it makes you
- Suggest, if possible, another way (*if they never telephoned the office, I would know nothing about it*)
- Stick to your objective of not being involved and do not moralise
- Most people recognise that this sort of thing is wrong and agreement to avoid it should be attainable. If not, then consider whether in the long term you want to work for such a person
- Really serious – whistle blowing incidents – go beyond the scope of this book.  
(Suffice to say that you should proceed with caution, take advice from someone who can be objective about the matter, and consider acting only in a way that keeps your involvement confidential).

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### 7.3 What about BIG problems?

There are interpersonal problems that negate the whole boss/subordinate relationship. Such include bullying, sexual harassment, or racial (or other) discrimination from your boss; all must be addressed very seriously.

- First, check – and check very carefully – that your worst fears are true and that what is happening cannot be a misunderstanding. Keep an open mind while you do so and involve your organisation's consultation processes as necessary
- Secondly, consider carefully what you want to do. There are various options, ranging from organising for someone else (maybe your boss's boss) to intervene, to taking legal action; or just walking away. You have to balance what should be done with the practicalities, and include a longer-term career view in your thinking. It is not suggested that you put up with anything of so serious a nature, equally if you see that your situation can never be the same again, you may want to organise a fall back position ahead of taking action.

The legal implications are beyond the scope of this short text, though it should be acknowledged that there *are* legal implications (and if you experience such problems you may sensible seek advice – and do so early on – from such as a union, staff association or solicitor).

**TIP:** Always address such issues, always consider what you do carefully, always take formal advice and do not allow yourself to feel isolated and alone. Do so sooner rather than later; indeed it is worth remembering that most, if not all, problems tend to be made worse if addressing them is put off.

### 7.4 Beware creating problems

Sometimes it's down to you: you may create problems (albeit unwittingly). So here, with no apology if they are obvious, are some real no-noes that can lead to potentially *substantial and lasting* problems.

- Never bribe or blackmail your manager (with favours of any sort)
- Never make important requests in a social setting (particularly not if the whole department has been in the pub for hours and the answer to almost anything would be yes)
- Never attempt to persuade them in difficult, perhaps contrived, circumstances (e.g. in a meeting with their manager – floating an idea that you have primed them to approve, perhaps)
- Never exert emotional pressure (by bursting into tears, say)
- Never lie to bolster a case (you make your chances of being believed again minimal); and more, no doubt.

**TIP:** Always think before you adopt what seems like an easy fix. If it seems too easy, there is probably a catch – and it could come back to haunt you.

## 7.5 Last resorts

It pays always to bear human nature in mind. Many of the ideas to deal with difficulties involve a soft approach. Saving face, bolstering confidence, making safe and sheer tact all have a part to play. If you think diplomacy is another word for sledgehammer then hold yourself in check; only rarely, and with great care, is a display of out and out anger (controlled) appropriate.

Beyond that there is one other tactic that has not been mentioned: a little old fashioned *flattery* (which, it is said will get you anywhere).

Now care is clearly necessary here too, this is not something to direct at just anyone. But it could be appropriate. Just because *you* would see it as a ploy a million miles off, does not mean that someone else, perhaps actually eager to be thought well of, would not – and maybe your manager or other senior people with whom you deal are like this.

NOTE: if, when you read in the last paragraph: *just because you would see it ...etc*, you said something to yourself like *Quite right, so I would* – then you have just proved to yourself how well flattery can work.

## 7.6 Building on success

The senior people you deal with are (probably!) not stupid. They are also motivated in part personally (they want things to go well/a quiet life etc.). And they know a good thing when they see it.

The ultimate trick to overcome difficulties and get lasting change is to create a thin end of the wedge and *demonstrate* that the change works. It should always be easier to achieve more of the same once they see the advantage.

*Example:* be optimistic: imagine you succeed: something is – reluctantly – delegated and, surprise, surprise, all goes well, then the next time is – perhaps – viewed differently.

**TIP:** Persuade people to try a change, show them that it is a change for the better – and use it as evidence for more of the same. This is a tactic that can run and run.

## 8 The Benefits Of Job Appraisals

Properly handled the job appraisal system and interviews (whatever they may be called) should be a godsend for those wanting a good relationship with their boss. I like the saying (of Kahlil Gibran): “He who does not seek advice is a fool. His folly blinds him to truth and makes him evil, stubborn and a danger to his fellow men.”

Here, though this section focusses on formal appraisal situations, it should be noted that evaluation takes many forms and some of the issues addressed (e.g. dealing with criticism) may be useful on other, less formal, occasions.

### 8.1 Tell me how I’m doing

Never forget: how you progress is, in every sense, largely down to how well you perform; and your manager is responsible for assessing your performance.

Most organisations have an appraisal process (some better than others) and there is only one way to view them – *as an opportunity*.



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You need to:

- Know how your performance is viewed
- Review and learn from the past
- Seek improvements for the future
- And, perhaps most important of all, to link the whole process to one of active career management and to the (increasing?) satisfaction and rewards you get from your job.

To do this you need to *collaborate* with your manager to make your appraisal useful, and *influence* them to ensure the appraisal works for you and for them.

## 8.2 The reason for appraisals

First, you need to understand *why* the organisation has an appraisal process (apart from the not unimportant reason that [U.K.] employment legislation says it should – this can sometimes mean that appraisal is seen only as an annoying, but necessary, formality; if so you should make it clear that *you want* it to be useful).

The main reasons for the process, which should benefit both the individual and the organisation, include:

- Reviewing individuals' past performance
- Planning their future work and role
- Setting specific individual future goals
- Agreeing and creating individual ownership of such goals
- Identifying development needs and setting up development activity
- Providing on the spot coaching
- Obtaining feedback
- Reinforcing or extending the reporting relationship
- Acting as a catalyst to delegation
- Focusing on longer term career progression
- Acting motivationally (yes, really!).

The appraisal review may focus on some or all of these; they are not mutually exclusive, but the relative emphasis may well vary. Overall the intention, through all of the above, is to improve existing performance (taking the view that even good performance can often be improved), and make the likelihood of achieving future plans that much greater.

**TIP:** Understand what the organisation regards as most important, and also decide what is most important to you.



### 8.3 How your appraisal can help you

If you are to get the most from your appraisals, you must set yourself specific objectives under a number of headings:

- Planning how to make positive points about performance during the period under review
- Being ready to respond to points raised, including negative ones, appropriately
- Projecting the right image
- Reviewing specific work plans for the next period ahead
- Reviewing factors on which success in the future depends
- Identifying the need or desirability for training and development
- Looking ahead to longer term career development
- Linking discussion to salary and benefits review.

Your thinking about all of these needs to be positive. What needs to be done is not simply to think broadly about the sort of year it has been overall. It is to have clear intentions regarding not only *what* needs to be (or will inevitably) be discussed, but about *what you can get from the discussion* immediately and in the future.

### 8.4 Preparation

The first principle should be that preparation does *not* start just before the meeting. You need to create and maintain a personal “appraisal file”.

The starting point is the documentation from your last appraisal. From then on, and throughout the period, you should make a point of collecting into that file copies of documents that have a bearing on your next meeting. These will include:

- A note of any “significant events”; these might include something about what was your first presentation, say, or the fact that you spoke at a trade association meeting or joined a significant committee
- Notifications of targets set, progress against them and ultimate results achieved
- A note of any courses you attend (as a minimum file a copy of the course outline and any evaluation form you may have been asked to complete, perhaps together with a note of where any resume notes are to be found)
- Comments made by other people: maybe the M.D. wrote you a letter of congratulations, or a satisfied customer put pen to paper about service you delivered.

Other useful documents might be any memos, minutes of meetings or other documents that may be useful as a record of your activity and outputs. The idea is not to hoard everything, or spend a long time amassing this information, a note rather than a whole document may well be sufficient. You can sensibly match the information you gather to the topics that you know will feature in your forthcoming review. For example, if you are judged in part on your communications skills, keep some evidence of them.

Remember that this is not solely a “boasting file” containing references to your successes. If things do go wrong, or less well than you had hoped, they may well be subject to review also – this extends the information you can usefully collect.

**TIP:** It is difficult to recall all the events of a busy period, so if you have such a file it will always make preparation just before the event easier to do and more likely to make the appraisal effective.



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So, with good information to hand (and no need to rely on memory which must produce details from a year back) you can:

- Take the initiative where necessary
- Study the system (for example making sure you are aware of the areas to be reviewed and ready for them)
- Ask for – with good notice – an agenda and details of what is to be discussed
- Prepare responses to specific points (including explaining why some things may not have gone so well)
- Set yourself specific goals where appropriate (e.g. *I will get agreement to attend a course on X in the next three months*).

In addition, always display a constructive attitude to appraisal when you discuss it with your manager (and especially when you ask for anything); this too can help things go well.

## 8.5 Topics for discussion

The formal appraisal system will alert you to the main topics that will be discussed. The following are likely to be the sort of headings under which discussion and review of past performance will be organised.

*Agenda:* the first questions may be linked to finalising the meeting:

- What do you want to come from this meeting?
- Are there special areas you would like to spend time on? Why?

*Job:* here questions focus on the task in hand, both *qualitatively* with questions about what you like, have enjoyed or found satisfying or challenging (or a problem); and *quantitatively* with questions about successes, and results and targets met or missed.

*Relationships:* investigating your work in terms of how it interacts with other people (whether peers, subordinates or those elsewhere in the organisation – or outside it – with whom you must work or liaise).

*Development:* this heading allows a focus on skills: what is needed for the job now, how you rate yourself at them, and whether there are skills which need adding or extending (or which are not currently being utilised).

*Personal:* an opportunity to think about things more in terms of feelings: have things been easy or difficult? Would you do things differently if it were possible? Are you being stretched, are you learning or getting into a rut?

*Special projects:* some such heading allows specific, or more topical, areas of your work to be discussed.

**TIP:** Make sure you *anticipate* (or ask about) as much as possible and *add* (or ask for additions) – other topics which the headings indicate *might* be omitted.

## 8.6 Conduct during the meeting

A few key matters are of overriding importance here, consider:

- Your appearance (apart from being smartly turned out for an important occasion – your boss's boss may sit in – make sure you look well prepared and unflustered)
- Your manner (always be constructive, take your time, do not be
- rushed and give considered comments and responses)
- The procedure (your manager may have to abide by certain practices as much as you do; while a system is in force, respect it)
- Listen, as in LISTEN! – and make notes as necessary (ask for a second or two to note things down if necessary)
- Objectivity: appraisal is important for all concerned. It will not help to lose your cool and a calm, considered and objective approach throughout is likely to be best.

**TIP:** In any appraisal meeting the appraisee – you – should do most of the talking; conducting yourself on this basis is good sense.

Your communication during the meeting needs care. Communication is not the easiest thing in the world, so be sure to keep things working well in such a meeting (and any other for that matter). Particularly:

- Ensure you are clear (planning helps here)
- Be descriptive (this is no place for saying – *Well, basically it was sort of difficult* – when what is necessary is a clear statement of the situation you faced over something)
- Concentrate on the *implications of things* and *the results* rather than the detail on the way through
- Offer proof of things if they may be contentious (and that means something *other* than you saying *I'm sure*).

Last but by no means least, *never let anything go by that you are unclear about – if you are not sure what is being said: ask.*

## 8.7 Action after the meeting

Once the meeting is over what do you do? Sigh with relief and pour yourself a stiff drink, perhaps? Actually, several things:

- Take note of advice given (you might just have lessons to learn, indeed a good boss should make sure you have)
- Request written confirmation (this may be normal, but make sure you get not just a summary of the meeting, but a specific note of items, actions agreed and dates – it could be best to take the initiative on some of this)
- Take any actions promised and remind, if necessary, of action that your manager has promised (perhaps to have another meeting to take some matter further or to involve you in a specific project)
- Link to your records and planning for this next session, even if this is a year ahead (in some organisations it may be more often) – it is a rolling process.

Such meetings really are a major opportunity. Aim to use – and profit from – the outputs of your appraisal throughout the year.



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## 8.8 Recognise that criticism is helpful

Realistically, any appraisal is going to discuss difficulties – it goes with the territory – and you must be ready to deal with this. Three intentions should be paramount beyond a general desire to put the best complexion on everything.

- **Achieving accuracy:** here your intention is to ensure that the right facts are considered. Beware the appraiser using vague statements like “You’re never on time with anything”. This is unlikely to be true. But what *are* you late with and what are the implications? It is easier to discuss specifics and questions may well be the route to identify them. Never argue with anything but the true facts, checking what is really meant is the first step to responding in the right way to what is said.
- **Giving an impression of objectivity:** do not simply become defensive, or discussion is unlikely to be constructive. Using an acknowledgement to position what follows is always useful. It:
  - Indicates you feel there is a point to discuss (if you do not, then we are back to achieving accuracy – see above)
  - Shows that you are not going to argue unconstructively
  - Makes it clear that you intend to respond in a serious and considered fashion
  - Gives you a moment to think (which may be very useful!) and sets up the subsequent discussion so that you can handle it better.

Just a few words may be all that is necessary here. Starting with a “yes” gives it power – *Yes, there was a problem with that* – and sounds right even if your intention is to go on to minimise the problem.

- **Dealing with the points raised:** now the job is to deal with the matter. Mechanistically the options are few and therefore also manageable. You may need to explain why a difficulty occurred, if so there are four routes to handling things:
  1. *Remove the difficulty:* if possible, you can explain that what seemed like a difficulty or error was not. A delay, say, might not have been in an original plan, but caused no problem.
  2. *Reduce the difficulty:* maybe you have to acknowledge that there was some difficulty, but explain that it was of little significance
  3. *Turn the difficulty into a plus:* sometimes it is possible to argue that what might initially seem like a problem is in fact not. A delay might not have been in an original plan, but have been included for a positive reason – there might only have been a real problem *without* the delay.
  4. *Agree the difficulty:* after all, there is no point in trying to argue that black is white. Most ordinary mortals have some problems during a whole year of activity. Your job is not to persuade the appraiser that there were *no* problems, but to persuade the appraiser that, on balance, your year was a good one and that any problems that did occur were dealt with promptly and well and are unlikely to reoccur.



Remember – and this is perhaps the most important point about appraisals – the prime purpose of appraisal is to set the scene for, and ensure, successful work in the *forthcoming* year, not argue about what cannot be changed.

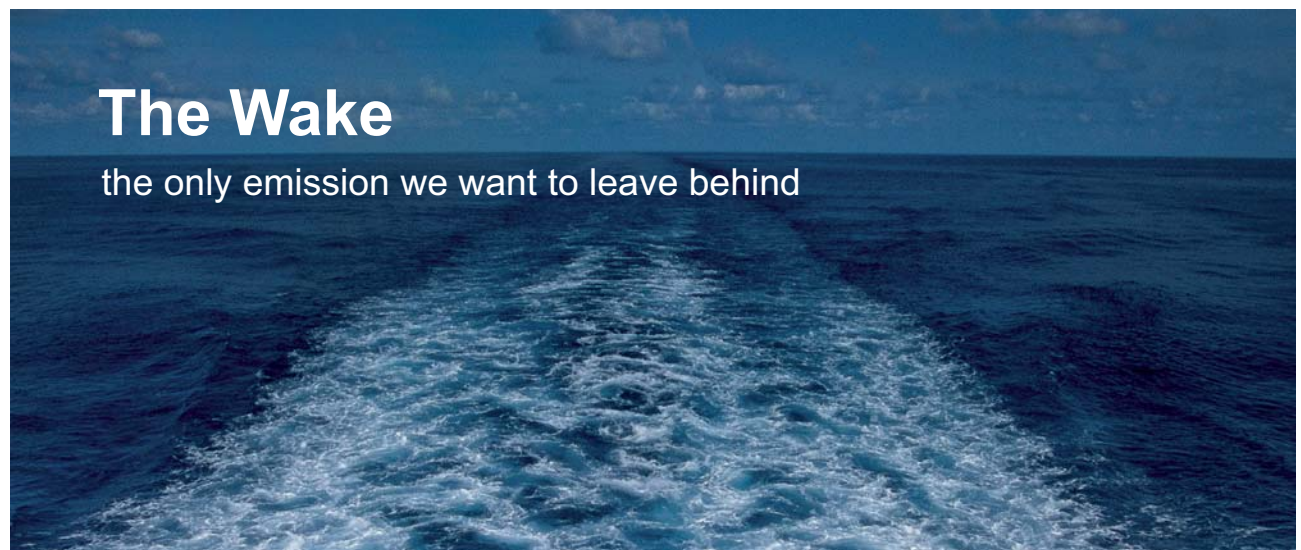
NOTE: No one can turn the clock back, but we can all learn from experience. So the key thing to include when the discussion touches on difficulties, is the lessons that have been learned for *the future*.

The list of implications and actions here is considerable. For instance, failure may have come about:

- Because of unforeseen circumstances (and new procedures are necessary in case such circumstances occur again)
- You may be starting to have to use skills not previously necessary in the job (and training may be needed to quickly add such to your portfolio)
- You may have made a simple slip (and only need to make a firm mental note not to let it repeat).

There may be lessons to learn, but ultimately the emphasis needs to be on what happens *next*, and this allows a return to the most constructive elements of the dialogue.

**TIP:** Dealing with criticism constructively allows negative matters to be put on one side and again allows you to take an initiative in managing your relationship with your manager.




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## 9 Summary

Perhaps a few final words are usefully preceded by reminding ourselves of an old proverb: “*If you don’t believe, you can’t achieve.*”

### 9.1 Final overall thoughts

Overall, managing upwards is something that takes place *through* other things that are going on rather than being an activity in its own right.

For example, in communications, projects and meetings you may need not only to do these things, but also to add an element of activity into the process that manages the situation as well as the circumstance.

By and large, what you want is going to help you do your job better – and that is what your boss wants too, so there is no inherent clash. Some managers can undeniably be difficult, cussed sometimes, but many problems are more to do with circumstances (e.g. lack of time) than to radically opposed views.

Overall, it may help to view the process as *educational*. You are helping them to do the right things rather than seeing it as an adversarial process.

### 9.2 Ideas for the future

At the end of the day, managing your boss is a full time job. It must be done in parallel with the job of doing your job, and getting the results you want (and that your boss wants). It requires – necessitates – a range of skills, particularly in various forms of communication. It also demands patience, persuasiveness, persistence and assertiveness; and it needs care and consideration.

Your objectives are essentially twofold (and they overlap) to:

- Ensure you can do your job effectively – with excellence – and achieve, or exceed, your targets
- Enhance your satisfaction from the job and the career progress you make towards new challenges

Getting it right can make the difference between having just a job, and a career that rewards and satisfies; and it can ultimately benefit your boss too.

Nothing reviewed here is necessarily easy, certainly it will not be achieved without conscious thought and effort: it all needs working at. But it can be made to work. That said it is perhaps the right note on which to end to remember an anonymous maxim: *“Always do exactly what your boss would do if, that is, they knew what they were talking about!”*

END

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