

Managing upwards

So far in the book, we have largely ignored the context of your management system: the corporate chain of command within which it may only represent one part.

If you are lucky (?) you may either be the owner of your business, or have a very sympathetic boss or board of management, who are keen to let you get on and manage your organisation in your own way.

If you are even luckier, the corporate framework, of which you are part, has already embarked on QFD, and you are undertaking this work as part of fulfilling the potential of your 'process' within that.

But if, as is most likely the case, you are breaking new ground in your company, and your boss, quite reasonably, is concerned to ensure that your new approach will deliver, then you need to develop a strategy to build and sustain that confidence.

Such a strategy is likely to include the following elements.

- Selling your plans as a vital step in grasping the future of your business.
- Developing commitment to your work in this area.
- Getting approval for how this work will, and will not, interface with the corporate framework.
- Agreeing the criteria by which your work will be judged a success.
- Integrating key corporate strategies into your work.
- Introducing the approach to other parts of the business.
- Gaining concessions and support in those areas where you most need them.

The manager who supports the boss - the manager whom the boss can rely on and trust - is the one who will be given the most freedom and the least supervision.

Mary Ann Allison/Eric Allison
Vice President, CitiCorp/Financial writer
in *Managing Up, Managing Down*
(Simon & Schuster, 1984)

Chapter 13

The freak heat-wave boded well for a surprisingly pleasant weekend, providing the promised storm could do something to reduce the humidity. Unfortunately, the sudden change in the weather had caught the Cavendish Hotel off-guard. The heating system appeared to be running full blast. A dishevelled and clearly overheated barman had informed Richard that they were waiting on maintenance, and would he like some extra ice in his drink. The low sun, streaming through the conservatory, created flickering patterns through Richard's gin and tonic. It oscillated intriguingly on the teak counter, as the sparkling liquid rocked from Richard placing it forcibly on the bar. He looked at his watch. Five fifty-five. Where was Daniel? The heat did nothing for his temper.

He mentally allowed Daniel another five minutes, and when he did not show, he slung back the last of his gin and tonic and went upstairs in search of Lucy. He knocked lightly on her door.

"Come in," she said. The door was ajar. Richard pushed it open. Lucy stood by the dressing table in a bathrobe.

"Richard!" she said in surprise. "Sorry, I thought you were a cold refreshing drink."

Just then, Richard was aware of someone beside him. He turned and saw a waiter carrying a tray with a large bottle of mineral water, a bowl of ice, and a glass. The waiter looked expectantly at him, so Richard took the tray and turned back into the room. "Voila!" he said. "Abracadabra, and lo, I have become a cold refreshing drink." He walked into the room and placed the tray on the circular table with a flourish.

"You're early!" she accused.

"Yes. Daniel, bless him, didn't show. So I've been getting hotter and madder for the last thirty minutes."

"Yes, it is hot," she replied. "I'm beginning to wish I hadn't asked for a room facing west. Help yourself to a drink. I've got another glass somewhere."

- Understanding how you will handle concerns and criticism.
- Establishing the means to report progress.

In this chapter, we look in more detail at the 'upward' responsibilities of leadership, and at how the above elements can be worked out in practice.

Selling your plans

The first step in a successful strategy to 'manage upwards' is to convince your bosses that the steps you are taking are clearly the right ones.

If your organisation is undertaking this work as part of a larger initiative on QFD, then the key mechanism for achieving this is your process proposal.

While this might seem obvious, the influence of the process proposal is far more subtle than we might at first give it credit for. To this point, it is entirely possible that you may have seen the process proposal as simply the means to reply to the needs of the organisation. But that is to fail to realise its full potential.

The process proposal provides the means for you to earn the full confidence and support of the business for your most ambitious schemes. Intelligent wording of the proposal can convince the business of your arguments, earn you the resources you need, and buy you the right to get on with it without interference.

Think of the process proposal as the application form for the job you most want in the world - and you will probably get it!

If, on the other hand, you are pioneering the application of these approaches within your organisation, the selling job is both more important and more difficult.



No living being is held by anything so strongly as its own needs.

Epictetus
Roman Stoic philosopher



Selling your plans

In attempting to sell your ideas to your boss, it is worthwhile reflecting on the quote above, and thinking through the following:

What are your boss's dreams for the future?

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And what are the issues that keep him or her awake at night?

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How can your plans make a difference in these areas?

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He looked round the room, everything was in disarray. "I'm sorry! I should have phoned up first!" he apologised. "I'll go, and let you get dressed."

Lucy turned from sorting out her hair, and smiled at him. "It'd've made no difference," she said. "The phone doesn't work. Nothing in this place seems to. I'll get dressed in the bathroom while you cast your eye over my outline thoughts for Cyrus's visit, then we can go and get some dinner."

She walked over to the bed, and Richard went to close the door.

"Don't," she said urgently. "Leave it open. I've been carefully cultivating that little bit of through draught. It's the only respite I've got. Come over here and look at my plans." He could see that the bed was covered with sheets of flipchart paper. "Sorry about the mess," she said. "I was getting a bit enthusiastic." Richard sat on one side of the bed, while she sat on the other and flicked through the various bits of paper.

Lucy was right about the heat. Before five minutes were up, Richard had discarded jacket and tie, and was undoing his shirt cuffs.

Lucy ran through the last sheet of paper, and then stood up and said: "Right, you have a read of those, and I'll get dressed."

Just as she did so, there was a knock on the door.

"It's open," said Lucy.

Daniel walked in. He had arrived late, and the desk had directed him up. He stood just inside the door, and cast his eyes around, and then gave Richard and Lucy an old-fashioned look.

Richard looked affronted, but Lucy laughed.

Daniel started to bluster "Yes, well..." Clearly he was about to make something of the situation.

"Oh, come on Daniel!" said Richard. "Use your eyes. This is work. Nothing is going on! Lucy invited you in, for crying out loud!"

Daniel looked around the room again, and took in that the bed was littered with work. He could see that he was making something of nothing, but retained his scowl anyway.

Your task is to build sufficient confidence in your bosses that they provide you with enough latitude and support to enable you to make it work.

The first step is to take the initiative. There is a world of difference psychologically between selling a new idea, and justifying your position.

A formal presentation¹ covering:

- the business threats and opportunities that your organisation is facing, or will face over the coming months/years
- what your organisation needs to deliver if it is to fully grasp them
- how that translates into challenging performance targets
- the dormant potential of the organisation and how it can be mobilised in pursuit of those targets
- why this requires a change in the management approach (linked to an exploration of the current issues in the management approach)
- the logic of the new ways of working, and its associated benefits
- your plan to deliver this, and the progress you have made to date,

will do much to demonstrate the quality of your thinking, and the rightness of your approach.

You may recognise that the content to support those headings, falls naturally out of the work of the preceding chapters.



As marketers, we have to bring our vision down to a useful level.

William Olsten
CEO, Olsten Services Corp.
in Success, February 1988.



If you can't tell me something about your business I don't already know, you probably aren't going to surprise our competitors either.

Anonymous CEO to division heads
Hickman and Silva, Creating Excellence
(New American Library, 1984).

“Come on, let’s get our drink and leave Lucy to tidy up,” said Richard, standing up. He picked up his jacket and tie, and ushered Daniel out.



The drink with Daniel was far from satisfactory. It was clear from the outset that Richard was not going to win Daniel over to his vision of the future. Richard got the impression that any vision of the future acceptable to Daniel would not have Richard anywhere in it.

The meeting terminated, almost predictably, with Richard explaining, in no uncertain terms, that he required Daniel to deliver a complete process proposal to his desk by this time next week.

When Lucy came down to dinner, Daniel had long since gone. And Richard was sitting morosely at the bar. She walked up silently and sat down beside him. She looked stunning in a figure-hugging black dress. Richard looked her up and down.

“Wow!” he said. “Are you trying to convict Daniel of his prejudices?”

Lucy simply said: “No, it just happens to be the coolest outfit I’ve got with me.” Then she paused and added: “You’re not telling me that Daniel seriously thought something was going on up there?”

Richard shrugged. “No, not really, but I think he was seriously surprised when he first walked in the door.”

Lucy laughed as she remembered the surprise on Daniel’s face. “I’ll go and check they’ve got a table,” she said.

While she was gone Richard thought about her words. She had said “... going on up there” not “... going on between us”. Strangely, Richard felt some hope at her choice of phrase, it sustained his fantasy. He took the time while she was gone to wonder whether she wore underwear under her little black number. He couldn’t see any lines showing, and suspected she did not.

When she returned, Richard told her that he’d spoken to Cyrus earlier that evening. He was coming over next week. He would be with them for the Thursday morning, and was then catching a 2pm flight to Paris from Bristol.

“That’ll be perfect,” said Lucy.

¹ An outline presentation template is available on the associated web-site (see Appendix 7).

Developing commitment

Your goal in selling the plans for your work is to develop a sense of partnership with your bosses. At the very least, they should believe that what you are doing should be done, and to give you their blessing for that.

They may not be convinced that this is the right approach until it has delivered physical results. But they should at least be convinced that the approach should be tried and evaluated, and that you and your organisation are clearly the right place to do this.

You are far more likely to gain the support and latitude you need if the company feels that you are a visionary who is piloting a new approach on its behalf, rather than seeing you as a bit of a maverick who has yet to learn the error of his or her ways.

The key to success here, is to arrive at a point where it is their decision to pilot the new approach and make it work, and you are simply the foresighted and capable agent who will do this for them.¹ How you do this depends on the relationship you have with your bosses, but it is probably worth exploring the issues with them at a point where the QFD has been defined, but before your people are committed to deliver the results.

The more QFD is seen as a joint project with your boss, the more latitude you are likely to gain in applying it.

¹ Nice trick if you can pull it off!



Would you persuade, speak of interest, not of reason.

Benjamin Franklin
American statesman



Possible questions to answer in gaining agreement on QFD

What are the limitations of the organisation's current approach to planning and management?

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How does a QFD based approach overcome these?

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What are the organisation's main concerns and reservations likely to be?

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How will these be answered?

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It did not take Lucy and Richard long to work out how best to play Cyrus's visit. Richard wanted to get the business part of the evening out of the way as quickly as possible. The humidity in the room, combined with Lucy's good humour and her stunning figure, made it easy for Richard to allow himself to get distracted.

Richard fancied that he could actually see beads of perspiration breaking out on Lucy's chest, and he wondered what they would taste like. He could almost imagine the saltiness on his tongue. Then he began to imagine Lucy's breasts set free from that figure-hugging dress. He imagined further, his mind dwelling on and relishing each image as he watched her across the table, and he began to find himself increasingly uncomfortable and had to move to rearrange himself.

Truth be told, they both had a lot in common, and they both enjoyed each other's company. And the heat, and the wine, and the odd unguarded innuendo had their effects on each of them. But, despite the banter, it dawned on Richard that Lucy had been holding a line which meant that things could not just develop accidentally-on-purpose, and that any pass would be very clearly and explicitly, exactly that. And when it came time to make a move, Richard found that he couldn't raise the stakes high enough to simply put himself on the line. The risk and implications of rejection were just too much for him to contemplate. And so, with a feeling in the pit of his stomach that Richard thought he had left behind in the school playground, he reluctantly gave Lucy a simple goodnight kiss and headed for home, thinking of what might have been if only he had been a bit more adventurous.



Cyrus arrived at 8.30 on Thursday morning, complete with entourage. As per the plan they had developed in Lucy's hotel, Lucy sent the entourage on a factory tour with Abs, and siphoned Cyrus off into a separate meeting room, where Richard awaited them.

As Cyrus entered the room, his eyes were drawn to the far wall. An interwoven montage of diagrams, matrices and graphs drew his gaze. He was intrigued, but mindful of protocol, he turned quickly to Richard, and they shook hands.

"Cyrus, welcome to Gloucester!" said Richard by way of opening the conversation. He had met Cyrus only once before, briefly during his round of final interviews. Truth to tell, he felt slightly in awe of this man

Getting approval for interfaces

Achieving a partnership with your bosses will make it far easier to gain concessions on conforming to the corporate framework.

The latitude that you are most likely to need in implementing the new approaches is freedom from having to know and justify the specific reasons for the latest isolated incident, to the nth level of detail, within hours of it having happened.

At one time, a manager of a thousand-person-strong organisation used to regularly get demands from his boss to explain individual system crashes in isolated but critical parts of their organisation. This happened typically twice a week, and took up a lot of his and his people's time in simply finding the information. How much better to be able to answer: "Yes, we are currently at an average of 1.8 of those a week. The trend is declining at 23% per month. The main reasons are illustrated on this graph and I have teams tackling the top three, which represents 72% of the issue."

Unfortunately, if this response is counter-cultural, it may not be seen to be as constructive as it clearly is. It is therefore very important that the expectations of your bosses are managed from the outset. They need to believe that you are still in control when things don't happen in quite the same way as they used to previously.

Other examples of interfaces that you may need to agree concessions on, include:

- Lengthy departmental reports
- Old and out-of-date measures
- Involvement in corporate initiatives
- Existing procedures and standards
- Aspects of corporate policy.



who held a large part of his career, his future, and his security in his hands. He hoped it did not show.

Cyrus smiled easily, "Thank you Richard. It's nice to be here. How ya doin'?"

"Fine," replied Richard, "as we hope to demonstrate! We felt it would be useful to give you a quick overview of what has been happening, as a context to the rest of your visit. Is that okay?"

"Shoot!" said Cyrus.

Richard indicated a chair at the table, and Cyrus took this as his cue. He pulled the chair out and sat down. Lucy followed suit. And Richard walked over to stand beside the montage on the far wall.

"What you see here," he began, "is the result of our efforts to plan our business goals into the operation of the Gloucester facility."

Richard glanced at the neatly arranged, professionally prepared sheets, and looked back at Cyrus. He expected him to be impressed by the amount of thought and preparation that had gone on. He did not look it. And when he spoke, he did not sound it either.

"Really?" he responded, a touch of sarcasm was evident in the tone. "Most places seem to achieve the same thing much more simply. You know the odd meeting, the odd set of written objectives. That sort of thing!"

His eyes held Richard's in a piercing stare. Richard was now on the back foot. He had expected a bit of breathing space to get into his stride. But clearly Cyrus was more direct and blunt than that. Lucy should have warned him.

Richard struggled to think how to respond to this. Clearly, Cyrus could not see the need for this level of thinking. That was what Richard needed to address first. He decided he had to take some risks, if he was to regain the initiative.

"Yes they do. Providing the goals aren't too onerous. You know the odd 5% here and there." He had deliberately taken a sideswipe at the Cylek common goal setting approach. He continued: "Or where you suck out the future health of the business to deliver more challenging targets. But where is the skill in delivering 5%, when your business is capable of delivering 50%? Where is the challenge in saving 2% of your costs, when

Agreeing success criteria

So, that is what you want of them. What are you offering in return?

Gaining a clear agreement with your bosses on how they will judge the success of your work is an important part of your contract with them.

One place to start is simply to ask them the question directly. For instance, what proportion of your ambitious performance targets do you need to achieve for them to consider the approach successful? Does it have to be all of them, bearing in mind that they are probably in excess of what was originally requested? Or does it have simply to be in excess of the original request?

This is a point where you might usefully reflect back upon your own objectives for this work¹, and consider how they might figure in the success criteria.

Make sure that whatever you agree with your bosses as the success criteria are explicit, and that they are reflected in your own job description and personal objectives.



Exploring success criteria

What expectations does your organisation have for you and your team to justify yourselves?

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To what extent do these overplay or underplay the real concerns that the organisation should have?

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What information really reflects whether you are in control of your responsibilities and achieving your potential?

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you routinely waste 20%? Achieving 10% of your potential can almost be delivered by luck and goodwill. Achieving 100% of your potential, without compromising the future, requires careful thought and planning.”

Cyrus had lost some of his aggression. Richard fancied that he was considering the points in a new light. But the cynicism was still there. “So what you’re saying is that this will deliver me 50% improvement?”

Richard realised that this was where ‘the rubber hit the road’ with Cyrus. The Old Man was not impressed by theory. He took a flier. “Over the next two to three years, without any shadow of a doubt!” he replied. Cyrus sat back in his seat and eyed Richard carefully. Lucy looked at Richard wide-eyed in surprise. This was not in the script.

“So how does it work?” asked Cyrus.

Richard started with the Why-How chart, and how the objectives were set, and then moved on to explain the top-level QFD and some of the insights that had arisen from it. He then drew Cyrus’s attention to the measures and targets.

“You will see that the targets we have set ourselves for the remainder of this year, while reasonably ambitious in ‘normal’ terms, are significantly below the 50% we aspire to.”

Cyrus raised an eyebrow, indicating his wish for Richard to continue, and implying that he was watching carefully and critically. Lucy had been wondering, ever since Richard had made the 50% claim, how he was going to handle reconciling this bit.

“There is a good reason for that.”

A second glance caught Cyrus and Lucy frozen in their previous facial expressions. Richard continued with hardly a pause. “Whatever targets we set ourselves have to be owned, and believed in, by both the management team and the organisation as a whole. At this point, many of them are still thinking from an incremental mindset, but working through this goal setting process has begun to change that. As an example of this we can look at the work done by the ‘*Design and develop products and processes*’ process.”

Richard indicated the outcomes of the work Lucy had been doing with Deborah, which had been stuck below the main QFD.

¹ See page 11.

Integrating key corporate strategies

As the work in your organisation progresses, the rest of the business is not likely to remain standing still. Increasingly this means corporate initiatives of one sort or another:

- Business Process Re-engineering
- Focusing on the customer
- Balanced Scorecard
- Environmental Stewardship
- Business Excellence Model
- Investors in People, etc.

It is unlikely, unless you gained agreement at the outset, that you will simply be allowed to opt out of them. Yours may be the only valid case amongst 49 excuses, but it is not likely to be seen that way.

Unfortunately, corporate initiatives are often applied as blanket formulae, with little consideration for what individual organisations may already be doing. Resistance is often assumed to be laziness or complacency, and is not tolerated.

It is better then, to evaluate how the new initiative can be integrated into what you are already doing, and how what you are already doing can be integrated into the initiative.

Fortunately the systematic approach to management accommodates virtually every reasonable initiative known to management. Because it is comprehensive and focuses on the responsibilities of effective management, other initiatives often either fit within it, or emphasise one of the elements of it (see right).

In these cases it is relatively easy to use what is proposed to augment your own



How popular initiatives fit with the systematic model (also see Appendix 6)

Popular initiative	Systematic aspect
Business Process Re-engineering	- Process
Focusing on the customer	- Purpose
Balanced Scorecard	- Predict
Environmental Stewardship	- Purpose
Business Excellence Model	- All aspects
Investors in People	- People

“You can see that Deborah Lewis has already got her team thinking of more radical objectives, for instance 30% reduction in design to market time. I am confident that our performance this year will actually exceed these performance targets, and build their understanding, and their confidence, to pursue even more radical targets next year. You will get your 50%, but I have to take my team with me in order to deliver it. And that is why it’s a two to three year goal.”

Cyrus did not look fully convinced, but he appeared to be giving Richard the benefit of the doubt. Lucy looked impressed with Richard’s quick footwork. So much so, that she had become convinced that 50% was not only possible, it was the only way to go. If you could not design a business to perform 50% better, you were clearly not seriously trying.

Cyrus spent the next ten minutes probing the detail of the diagram with Richard, and with each answer, he became more and more comfortable. Finally came the question Richard had been expecting from the outset.

“So where does all this fit into the objectives you agreed in your budgeting process in December?”

Richard reached into his file. He pulled out the original fax he had received last Christmas. It had always looked a little jaded - the standard jagged font, and the typical black lines from a poor signal - but the intervening months had been less than kind to it, and it now looked positively scruffy. He stuck the fax up beside the rows of neatly typed objectives for effect.

“We believe,” Richard explained, “that the objectives you set us for this year, will not only be fully honoured by pursuing the plans shown here, but that the additional thought we have put into them will ensure that they are guaranteed, and exceeded, and that the excess performance will reveal itself in customer benefits, market benefits, and cost benefits.”

A wry smile played on Cyrus’s lips. The showmanship had not been lost on him, as he compared the soiled fax he had sent four months previously with the inexorable logic of the QFD process. He knew that his goal setting process had been anything but rigorous. It had taken two hours as part of a larger meeting, and had been based solely on what the market and the money markets were likely to expect.

On the other hand, he felt that Richard had gone to the other extreme. But time would tell, and he would give it enough slack to enable him to make that judgement more objectively. He had one more card to play.

approach, or to demonstrate conformity with what you are already doing.

The biggest danger arises when the new initiative represents a new objective on your QFD, as for instance environmental stewardship might.

Where the initiative represents a clear change in operational goals or practice, this needs to be carefully evaluated against the QFD, to see how it fits into the current strategy. The conclusions and implications from this evaluation then need to be reflected back to corporate management.

The Managing Director of an operating arm of one huge multinational successfully controlled all corporate proposals for a two-year period in this way. He would demonstrate a clear grasp of the implications, through using the QFD, and then schedule the intent for the next rewrite of the QFD.

Introducing the approach to other parts of the business

Because of the visible success of this approach, it is easy to get swamped with requests to help introduce it to other parts of the business. In the case of one organisation, they almost came to resemble a consultancy more than a manufacturing concern.

If your response to these requests is not managed very carefully, the danger may be that your own organisation will take its eye off the ball.

Encouraging your staff to get involved in other implementations can be a tremendous boost to them. It can help to recognise and reward their efforts, and raise their profile in the business as a whole.

He turned to Lucy. “This is a bit off of your normal track.” The implied question hung in the air.

“Yes, well, I’m not the architect of this one. I wish I had been. But to misquote Oscar Wilde, I’m sure I will be next time!” Cyrus smiled at her, slightly paternalistically, and she continued: “Seriously Cyrus, it’s a terrific process, and it has so much potential for us, for Cylek as a whole. I’ve never seen anything like it before, but I know it will work, I’ve already seen it doing so. I want to help Richard prove it here, and then I want to put it into the rest of Cylek. Once the others have seen what it can do, I will be so much in demand I’ll have to double my fee rates.”

Cyrus laughed. “If it does all you say it will, I’ll double them for you! But it surely can’t be all roses. What isn’t going so well at the moment? Where are your problems?”

Cyrus caught the pause, the quick exchange of glances between Richard and Lucy. The pause lengthened, and he knew they were going to be honest. They were clearly thinking through how to phrase it.

Lucy had decided to stay quiet. It was up to Richard as to what he would say. How open he would be.

After what seemed a long time, Richard looked back up at Cyrus. “Well, this example of how the QFD deploys down into processes.” He pointed at Deborah’s outputs. “It has to be said that this is by far the best example. Others are working hard to catch up, but some just don’t seem to be bought into it at all.”

Richard paused again, wondering how obvious his own failings in this area were to others. “Pushing this approach is bringing me into conflict with some of my staff. I believe they don’t want the transparency that the process brings. They don’t want the clarity of issues and the real measures of performance that may invoke additional responsibilities on them. I am concerned that, at least subconsciously, they hide their weaknesses, and don’t want to be exposed!”

Cyrus seemed to look right through Richard and merely sounded “Hmmm.”

Richard replayed the last line in his mind “... they hide their weaknesses...” and felt curiously exposed to Cyrus gaze, almost like Cyrus was saying “... and you don’t?” Richard found he had started to shuffle

However, the requests are likely to come in while you are still building on your early success, consolidating the approach, and taking on even more ambitious goals. It is vitally important that you balance the needs of the larger business, and the recognition of your people, with the needs of your own organisation.

One way of doing this is to have a set budget of time for your staff to do this work, and to focus your support on those parts of the business that are most integrated with your own. In this way you maximise your chances of the approach having a dramatic, growing, and lasting impact on the business as a whole.

There is one further quality check you should apply before offering support. Only do it for those parts of the business that would do it even without your help. Their leader will need that sort of determination if they are to stand any real chance of being successful.

Gaining concessions and support

Perhaps the most disabling event facing a team using QFD to transform their business, is a budget cut - whether that is represented in terms of a reduction in finance, or a recruitment freeze, or a block on planned capital expenditure. It is vitally important to the achievement of your goals that you do all that you can to protect your team from these risks. Your work will ultimately generate major improvements in efficiency, which can be realised through cost savings if required, but only if you can invest the resources to do it properly.

In seeking support for any further funding or investment that your plans need, ensure that the implications of cutting that investment are fully understood. Your financial backers will be more used to traditional management approaches, where

slightly. He caught himself, braced himself, and moved quickly on. “But I recognise that I will need to address this!”

Cyrus stood up abruptly and said “Thank you for that. I like the way your thinking is going, but I want to see some more for myself. I have to leave at eleven, perhaps we could get back together at a quarter of eleven, once I’ve had a chance to look around and speak to some people.”

Richard nodded and Cyrus continued: “Can you direct me to Daniel Matthews’ office? I promised to drop in on him while I was here.”

Richard’s heart sank. But, hopefully without it showing, he said to Cyrus: “I’ll walk you over there.”

“It’s no problem,” said Cyrus, “I don’t want to keep you.” Clearly Cyrus did not want a chaperone. His tone said it all.

“It’s okay,” said Richard. “I’ve got to go back to my office. I can drop you off there on the way.”



At ten forty-five exactly, Cyrus walked into Richard’s office. Richard looked up abruptly from what he was doing.

“I won’t beat around the bush, Richard,” Cyrus started. “I have strong misgivings over what you are doing here, as it appears do a number of your staff. Some are concerned that it will cause the company to take its eye off serving customers. Others feel it is onerous and bureaucratic. I am concerned that you may get so wrapped up in the theory that you drop the ball in practice. But...”

He had run through his speech without taking breath, but here he paused, and allowed his features to soften. “I appointed you to this position because you’re young and you have different ideas. I feel I need to give you a chance to prove yourself. But I have to admit to being concerned about the possible downsides.” Here he held his hands in a gesture of supplication. “I can only give you a limited window to deliver in. Cylek UK is currently under-performing. We missed budget last year, and the last four months’ figures show a steady decline. I expect you to meet the performance targets agreed in December for this current financial year, and to have made significant and sustained progress towards this within the next three months. Within that timescale you have a free hand to make your approach work. We will continue to fund Lucy’s support for your

the level of investment of management time in thinking out the future is far less, and where the major management focus is on handling the unexpected. Your enterprise is different, and needs to be treated so. Involving your bosses in understanding what you are doing may help you to establish this in their minds, and to stack the deck in your favour.

Handling concerns and criticism

Unless you are extremely fortunate, unforeseen issues will arise, and things won't go exactly according to plan. Some of these things will become visible to your bosses, either in your own reporting, or in the responses of customer organisations.

How you handle those concerns will be a key factor in your continued autonomy.

It is politically naive to assume that claiming that the problems are being addressed at the systems level will deflect all criticism. People trust and respect people who are like them, who talk their language. Accordingly, if your bosses are detail freaks, demonstrating that your knowledge is ahead of theirs will do much to establish your credibility. And then moving to the systemic solution will do much to convince them of your values.

Managing upwards is as much a game of psychology as it is of strategy.

Reporting progress

Having gained approval, support and even commitment for what you are doing, it is now important to maintain it.

Effective selling is not a one-off activity, but an ongoing process of relationship and confidence building. This is true whether the sale is being made outside the organisation for money, or inside the organisation for support.

Criticism has few terrors for a man with a great purpose.

Benjamin Disraeli
English Prime Minister

work for those three months, but we expect results. I'm sure I don't need to clarify the alternatives for you."

The last words were spoken firmly, but not unkindly. Richard nodded.

"Apart from that, I have to admit to being excited by what you are attempting here! I want to see you succeed! Make it work Richard, for both our sakes!" With that Cyrus turned on his heel and was gone.

Richard looked down at the papers on his desk, and wondered what to do next. He had not expected the visit to go like this. Lucy and he had hoped for so much more from it. They had not allowed for failure. Their mistake. He became aware of someone watching him from the door, and he looked up to meet Lucy's empathetic gaze.

"He's always been one for the grand exit," she said. "Are you okay?"

Richard just looked at her and wrinkled his nose slightly, a sort of facial shrug, and sat down in his chair. Lucy walked further into the room, looking more intently at him, as if trying to assess the damage.

"Were you seriously expecting more?" she asked him.

He shrugged again. "Well, more time would have been nice!" he suggested.

Mirth was clear in Lucy's voice. "Richard, you're from R&D, and from the UK. Cyrus is from Sales, and from the States! You have different concepts of time! You got about as much from him as you were going to get! Seriously!" Richard shrugged again.

"So, what else did you secure from him?" she asked.

Richard looked up quizzically. "What do you mean?"

"Well," she continued, "if you've got your key people meeting a three month timetable on this, there is no way you can conform to the budgeting timescales or the Orotto project, without extra resources. Did you get concessions on those?" Richard went quiet, and Lucy closed her eyes momentarily as she thought of a more positive constructive response than the one that had just occurred to her.

After a few moments of silence she continued: "Okay, we'll deliver performance improvements in three months that exceed his expectations, but that will mean we need to clearly rethink our plan for this, and the implications for people's time. That will tell us exactly what the con-

A key means of building that relationship and confidence over time, is the reporting process you use to keep your bosses appraised of the situation and your progress.

The report provides a real opportunity for you to demonstrate that you know what is needed, and that you are doing everything to deliver it. Accordingly, the report should present the following.

- A summary of progress against the factors that your bosses see as important. There will be deficiencies on occasion, but if they hear it from you first, it will demonstrate that you are 'on the ball'.
- A clear and demonstrable grasp of the reasons behind any failures or short-falls, and foresight that potential risks are being considered and managed in the most appropriate way.
- Evidence that risks and issues are being addressed according to a clear schedule; and what your bosses can expect to see as a result, and when.

The key goal in your report is that your bosses should be left in no doubt that you understand, and that you are managing the situation better than they would themselves.

cessions we need are, and we can justify them against the improved levels of performance we are proposing. Okay?"

Richard remained quiet. Still thinking. So Lucy concluded: "Okay, I'll get on with the plan" and lifted herself out of her seat. The abrupt movement seemed to bring Richard together to a point of resolve.

He looked up, his expression firmer. "Yes, that's a good idea. If you can draft it this afternoon, perhaps we can review it this evening?"

Lucy was a bit taken aback by the sudden change. She smiled briefly, said: "Fine!" and left.