



The Deliberate Creative Podcast with Amy Climer

Transcript for Episode #063: How to Manage Up with Julie Koenke February 16, 2017

Amy Climer: Welcome to the Deliberate Creative Podcast Episode 63. Today's episode is about how to manage up, otherwise known as leading up or followership. And I have what may be the most special guest I will ever have on the show. Her name is Julie Koenke and she is extra special because she is also my wife! I am very excited to have her on the show. She has a ton of experience with this topic, with managing up. She has spent most of her career as a bureaucrat, as she likes to say. She has been working in public education and so for those of you who are working in the public sector and sometimes there are some different guidelines or rules or just different culture, I think you will find this particularly helpful. But it also applies to those of you who are working in private industry or corporate life. Anyone working with an organization, with a team, you are going to find this helpful.

Julie is going to break down what managing up is, how it works, and how you can do it well. Ultimately, the purpose is to be more collaborative and more creative in your work. I am going to let her explain all about it, but I am very excited to have Julie Koenke on the show. All right, here is Julie.

Julie, welcome to The Deliberate Creative Podcast. Thanks for being on the show.

Julie Koenke: Thanks for having me, Amy.

Amy Climer: Today we are going to talk about managing up, which is something you have a lot of great experience doing. To start out, can you give everyone a bit of a background about your career and who you are and what you do?

Julie Koenke: Sure. My name, again, is Julie Koenke. I have worked in public and community education for about 20 years. I started my career as a youth worker back in the day in Madison,

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Wisconsin, working with a variety of organizations. I have spent the last 17 years of my career working with the Madison School District, first with the Madison School Community Recreation Department and then more recently in the academic side of the school district, working for and with a variety of folks to really help improve education for students in primary and secondary grades in middle and high school.

Amy Climer: And you have had more of an administrator role, right?

Julie Koenke: Yeah. For most of my career I have been in what most people would consider a central office administrator, or maybe it is a bureaucrat. The last 10 to 12 years of my career have really been focused on systems change at a high level. So that is where I have spent most of my work. More recently, I have started my own education consulting business, working with districts around the country and I currently serve as the Executive Director of the [Great Lakes College and Career Pathways Partnerships](#).

Amy Climer: Awesome, cool. Thanks for being here.

Julie Koenke: Thanks again for having me.

What is Managing Up? [03:21]

Amy Climer: Let's talk about managing up. Can you start off and share a bit of what is managing up? How would you define that? What does it mean?

Julie Koenke: I think there are a variety of terms that people call managing up. It might be followership, it might be leading from the side, it might be leading from behind or it might be managing up. We all have supervisors, we all have bosses, and it is really partnering with your boss or your supervisor to effectively meet the outcomes that you want. And it is about not being a passive follower. It is about being an assertive follower who is maintaining a vision and a direction for their work and is making sure that the folks who have the next level up in the organization are also aligned with that vision and direction and that you are aligned with them.

Amy Climer: So it is really about collaborating with and supporting your manager, boss, supervisor?



Julie Koenke: Exactly. That is the way I would see it. It is about developing effective partnerships and collaboration. Not so much about furthering hierarchies, but in some ways, breaking down the hierarchy a bit.

What Managing Up Looks Like with Your Supervisor [04:30]

Amy Climer: How do you do that? What does managing up look like? Can you give us either an example or walk us through what that interaction looks like, say with you and your supervisor?

Julie Koenke: I think the first couple of steps are one is about developing that partnership. One is about setting some norms and expectations with your supervisor about what they expect from you, but also about what they will need from you in order for them to be successful. And it is also about aligning your values with those who are that next level up. Understanding not just the values around the logistical natures of work, which is sometimes where we spend a lot of our time and schedules and emails and communication protocols, but it also really about our values and aligning around how we want to treat one another, about how we want to accomplish our work, about the impact and the purpose of our work. The first step, I think, is really aligning our values and our norms and getting clear with our supervisor.

I think the second is holding a vision for your work. Not disempowering yourself, which is what I see sometimes, specifically in hierarchies, is that sometimes it is an easy out to say, "I'm just a good soldier. I do what I'm told." But I think our bosses and our supervisors are expecting us to have a level of expertise in whatever our area is that we work. If that is the custodian of the building, our supervisors and our bosses are expecting us to have an expertise on the state of the building, what is working, what is not, what is falling into disrepair, what needs to be fixed and prioritized first?

If we are more on the clerical or business side, I think our bosses are expecting us to know what the immediate tasks are that need to happen, how that needs to happen, where there are problems, where there are challenges and what is working. And as we get into sort of the middle level work or programming work, there is an expertise you are expected to hold about the day to day work. And I think it is our responsibility to share what is working and what is not working with those above us to help inform a broader direction of the organization.



Amy Climer: Because they are the leader or the manager they see one thing and then the middle level managers or the frontline staff they see something completely different.

Julie Koenke: Yeah, exactly. I think that an organization cannot function if, we sort of have a myth about leadership, I think, in our country and maybe in the world, I do not know, I have mostly lived in the United States. I think we definitely have this myth that the leader is supposed to know everything about everything all the time. But the leader has to rely on having good people around them to push back on them, to question their decisions in a productive and in a positive, not in a way that calls them out. I think a leader needs, and it is essential in order for an organization to be successful, for the leader to expect that folks at the ground level are going to say, “Hey, this isn’t working,” but not just, “This isn’t working, stop doing it,” but, “This isn’t working and here is a better way to do it.”

And I think that is the part that is different about the idea of managing up or some people call it leading up or followership. Is not just that you are getting a mandate and then griping in the parking lot with your colleagues that the mandate is stupid, but rather that you are looking at the mandate or looking at the expectation and thinking about what works about that and what does not and what the possible issues are. And that you are presenting productive solutions back up the chain to say here are some better ways, here are some other things you might not be aware of, here are some implications for that decision. So ultimately, the decision can change and be the most productive.

Amy Climer: So it is about offering solutions rather than just complaining.

Julie Koenke: Exactly.

Challenges of Managing Up [08:34]

Amy Climer: What would you say are some of the challenges of managing up or some roadblocks or barriers that people might face if they are trying to manage up or lead up?

Julie Koenke: I think if you have not had that conversation that I talked about initially with your supervisor or with your boss, if you have not aligned your values, you do not have a collaborative spirited relationship with them. I think it is very scary. I think, again, there are a lot of myths about what a leader will and will not do and I imagine that in some organizations that



some of that fear can be based on reality, in real situations that have happened, where you might have a boss who might be maybe more vindictive or power hungry. But I think for the most part, at least in my experiences, most supervisors want to do well. They want their teams to do well. They want people to be happy in their work environment and they want to be productive and make a positive impact. I think if you hold that at the center of your work and your relationship, I think that that is really important to doing that.

Amy Climer: So going into that conversation with your supervisor like presuming positive intentions about them.

Julie Koenke: Exactly.

When to Manage Up [09:44]

Amy Climer: I am wondering if there are times when you should manage up and if there are times when you should not manage or if there are different approaches you might take in different situations. I do not know if you can talk about it if you have experience with that.

Julie Koenke: I think all of that sort of contextualize at least in the experiences that I have had and working primarily in a hierarchy. I have worked mostly in public service and hierarchies are important about how those institutions function. The conversation about hierarchy is probably another podcast. But I think that it is important to let leaders lead and it is important to give them the space to be able to do that. We as a society feel better when we -- it is clear and it is more understanding in a work environment when the person who is delineated or who has the real authority to make decisions is the one who is making decisions. I think it gets confusing if you work for a supervisor and you are badmouthing them, not supporting their work, not supporting their direction. I think that is very confusing.

I think that part of managing up is about when and how you share your feedback with your supervisor. Sharing feedback in a one-hundred-person presentation that says you have real concerns about where they are going, I do not think is going to get you very far. I do not think you are going to be seen as value-added to the organization. I do not think you are actually going to help the work move forward and I do not think you are going to actually stop the work either. Because you are putting your supervisor in a really difficult scenario where they have to



sort of maintain their own perceptions and you start to move into ego maintaining.

I think part of managing up is knowing your supervisor and having that conversation about when and how do they want feedback. I think most supervisors and supervisees have one-on-one meetings. I think that is the best place to problem solve to say, “Here is some feedback,” or, “How do you want to receive feedback?” I have had seven or eight bosses, probably more than that, over my career and each of them wanted feedback in really different ways. Some wanted it in writing, some wanted it in the moment. So as soon as something happened and after that meeting was over, if I had feedback, we would debrief. Others wanted it during our scheduled one-on-one. They were too busy they could not take that extra time. I think part of that is knowing when and how to give feedback.

I think the other is really making sure that you are being responsible to your supervisor. In presentations when you are co-presenting with someone, sort of the idea is that your first responsibility is to your co-presenter and then your second responsibility is to the learners in the room. And I think the same is true when you are working on a project with a supervisor. The first is making sure your team looks good and part of that is making sure your leader looks good, and then it is to the impact of who is impacted by your project. I think if you do not agree or align philosophically with your boss, then I think there is another set of issues where managing up has to take a different sort of turn and a different look. And that is probably yet another podcast on how you support a boss that you cannot align with. That is a bigger question.

Amy Climer: And I think also one of the points you made there was about making the team look good. Could you add a clarifying point about it is not for the sake of looking good, it is ultimately for the purpose of doing the work and that if the team is aligned and supporting each other, then the work gets done well. (See [episode 62](#) for more on this concept).

Julie Koenke: Yeah, absolutely. Again, it is not about ego, it is about impact. And I think the best way to have impact is making sure that as a team you are aligned, again, in your beliefs, in your values, and in understanding what the work is and what it is the next steps are that you are trying to do and trying to communicate and coordinate. I think that when your team is splintered then the communication is splintered. And that is not to say any of that is easy work to do. We all have different interpretations every time you walk out of a meeting. I certainly have had meetings where I thought I was very clear about what I said and thought people



deeply understood what we were doing and then find out the day later that the messages are all over the place. Not to say that that is easy work and it is simple to do, but tending to that is, I think, what is really important about managing up.

Amy Climer: You talked a minute ago about having a number of different supervisors and their different styles. I am wondering if we can flip this a little bit and talk about supervising. You have also supervised many people. Have there been situations where someone you supervised did a great job of managing up and what was that like for you being on the other side?

Julie Koenke: I think any time I have had a relationship where I have supervised somebody and that person is able to give me feedback, that person is able to ask clarifying questions, “I’m not understanding what you want me to do Julie, can you put that...” or here is what I think you thought and having enough time to norm our thinking I think is really important. Anybody who is in a managerial or a leadership role, your work gets busy. Not only do you have work that you are responsible for producing and implementing and moving along, but part of your work is about developing people. It is really helpful when you can establish a positive and productive relationship with your employee and that they can have ownership over their own work so that you are not micromanaging it. They can do the work in a way that makes sense for them, that they can provide you with insight and feedback about what is and what is not working.

The employees that I have had that have done that the most effectively have been the most helpful for me. They have helped me grow as a better leader and supervisor -- I have lots of room for growth in that area -- and they help you realize how your facial expressions come across or how your tone of voice comes across or even what is really clear in your head might not be clear as you communicate it out. Having that push and pull back, that sort of open relationship back, having someone who is highly responsible for their tasks, feels ownership, can say to you this deadline is coming up I need you tend to this, you have to tend to this. It might not feel urgent to me, but if they are telling me it is urgent, I can understand that it is coming up and is important for them.

Amy Climer: Yeah, as opposed to them just being like, “Oh my gosh, you’re not responding.”

Julie Koenke: Exactly. I would say that the employees that I have that are proactive, helpful and, again, are focused on giving me feedback, not based on their personal feeling so much, but



based on our collective work, how effective we are at hitting the target is the most useful.

Amy Climer: Right. And it goes to that you have to know what that target is and you have to be clear about your collaborative purpose.

Julie Koenke: Exactly.

Why Supervisors Need to Develop Trust in Their Supervisees [17:28]

Amy Climer: One of the other points you brought up there was about how as a supervisor you have to develop trust with the people you are supervising. Because if they are going to be giving you feedback, you have to trust that they have a clear perspective, you have to trust their work and if you are not micromanaging obviously, that requires trust and that they can do their work well and they are competent.

Julie Koenke: Yeah. I think that that is important. Many, many years ago, I heard someone talk about -- it was the leader of an organization -- he said the most important thing they do in their organization is not how they train their staff, it is how they hire their staff. If you are hiring folks that you know you do not align with philosophically, or on the flipside of sort of that idea of leading up, if you are hiring people that do not align with you organization or you visions philosophy, viewpoints, direction, mission, it is going to be really hard to have an effective supervisee-supervisor relationship.

And then if you are applying for jobs with organizations that you do not believe in or whose work you really do not care about or whose work you disagree with fundamentally -- there are organizations I could not work for because they just do not align with my own personal beliefs and values -- you are going to have a really difficult time managing or leading up or whatever you want to call it, you are just going to have a difficult time because you do not actually believe in the work you are doing. I think that is a big part of it.

Amy Climer: I love that today, maybe different than 30 years ago, we are having more conversations about alignment and that it is important just to make sure that your own beliefs align with the organization's beliefs.

Julie Koenke: Yeah. You see how a person's beliefs and values live out in their actions. And those



two things, I think for the most part, have to be congruent. Maybe not a great example but as an example, if you have someone who believes in environmental protections and believes in sustainable living and then he goes and works for a company that might not believe in those same things and in fact, disagrees with those beliefs and maybe even disagrees with the policies and the laws that are enacted to further your own beliefs that you align with, you are just going to be miserable, which is not going to work. And you are going to feel like you are in a system constantly fighting.

Amy Climer: Yeah. Not a good way to come home every day.

Julie Koenke: Probably not. Not to say that you cannot live in that situation, that you cannot make change and that you cannot make incremental change. I think you just have to be aware then what managing up in that environment looks like and it is going to be different. And your own metrics for what success is going to look like is also going to have to be different.

Example of How Julie Managed Up Well [20:33]

Amy Climer: Julie, I am wondering if you can give an example -- getting more specific if you can -- of a time when you managed up well. What did you do? What did that look like and what were the results?

Julie Koenke: There is one example, and to be honest I do not know how well I did it, but I can talk through my thinking at the time.

Amy Climer: Yeah, that would be helpful.

Julie Koenke: There is one example where I was working on a project and I had some concerns about the vision or direction of the project but I was aligned with some of the values and beliefs that underscored it. And in the sort of final steps of the project, I had some real concerns about the speed at which we were implementing. I did not necessarily voice them right away. Then when the leaders I was responsible to moved to their realm where they were giving public presentations and doing some of the work, I could see that some of the things that I was concerned about were not going well. And a colleague and I were positioned, we were in this middle role and we getting a large brunt of the blowback and the pushback. It was a very difficult time. And I think I could have easily thrown the leaders completely under a bus. I think I



could have easily completely tried to distance myself.

It is hard to always know how your intent is received, but my intent was actually to give some feedback to the leaders and provide some productive solutions that would make some changes, that would be responsive to the concerns as well as to include some processes that increased engagement of folks. In that timeframe, I was trying to use my role as the middle person who is getting a lot of blowback, I was trying to listen to where I was getting blowback and concern, I was trying to use that respect I had within that space so I was also trying to re-communicate and re-articulate what the purpose and the vision was. Then, I was also working really hard to give feedback and solutions and be a part of the solution team to make it a better situation.

My ultimate goal was not about my feelings or bosses' ego, my ultimate goal was are we improving the lives of young people and is this work going to further the lives of young people? As I could focus on that end goal and help focus my supervisors who were getting a little caught in the feelings of all the blowback, because it is very painful and it is very frustrating and it does hurt your feelings and all of those things, and we could focus again on what was best for kids. And the folks who felt disempowered or disengaged, whose feelings were also hurt, to know that they had someone who is listening to them who is trying to advocate on their behalf for their ideas, I think, helped bring some good solutions at the end of the day.

Amy Climer: Did things change?

Julie Koenke: There was a compromise in the middle. We made some changes and other changes we did not make.

The Weekly Challenge [24:12]

Amy Climer: This has been awesome, Julie. You've shared a ton of value about managing up. One of the things I do in every episode is end with a weekly challenge for the listeners so that they walk away knowing, okay I just heard all this information, here is one thing I can do this week to start implementing what I learned. What would be the weekly challenge you would give listeners?

Julie Koenke: I think one, if you do not yet have regularly scheduled meetings with your supervisor, that would be the first step. Have a conversation with them or shoot them an email

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or have a conversation with their secretary and just try to, at least, get yourself scheduled for a place where you can have regular conversations with your supervisor, if that is once a month, if that is every other week, whatever they are willing to do.

I think the second is, if you already have those meetings or once you get that meeting scheduled, is to have a conversation with your supervisor that is not just about your work. Often, my experience was in both being supervised and being a supervisor, it is very common on one-on-ones to say to whomever the supervisee is what is on your agenda, where do you need help. And so often, those meetings are about here is where I am having challenges, where is what I need you to do as the boss to make my life easier. We do not often ask our supervisors, “What do you need me to do differently and how can I best support you? How can I best support this work?” That would be my second challenge. And that is not intended for you to feel like you are, for lack of a better word, sucking up to your boss. It is about making sure that the work you are doing is aligned to their vision. It is about making sure that they need support. You understand what a good day and a bad day looks like for them. With supervisors where I have had that relationship, we are way more effective as a team.

In summary, I would say, get yourself a meeting with your boss and then have a conversation and ask your boss, what can I do differently and how can I best support you? And my hunch is your boss will be shocked. They might not even be able to answer that question right away. And you might even offer, “It looks like you have a lot of time that you are spending doing this, do you need me to do this thing over here?” And it is not about assigning yourself more work, it is not about sucking up to your boss, it is about getting the work done that needs to happen for whatever your mission and purpose is in the world.

Amy Climer: Yeah, that is awesome. Because ultimately, the goal of managing up is to meet the needs of the organization and to do the work that they are doing.

Julie Koenke: Correct. And I would hope that everybody who is in the work world -- I know that this is kind of Pollyanna -- I would hope that you have a job where you believe in the mission and the vision of your business, your organization, so that you do feel like eight hours a day is being spent in a productive manner that is improving the world.

Amy Climer: Absolutely.



Julie Koenke: And if that is not happening, that is another podcast too.

Amy Climer: Right. We have got a bunch of podcasts we are going to do after this, right?

Julie Koenke: Yeah, exactly.

Amy Climer: Julie, if people wanted to connect with you or learn more about the work you do, how can they find you?

Julie Koenke: I would be happy to talk with anybody. As I said, I have started my own consulting business and so I am happy to coach folks. I have spent a long time as a middle manager so I certainly understand what that world is like and the challenges. I am happy to coach folks or talk with folks and they can just simply email me at julie@climerconsulting.com.

Amy Climer: Great and I will put a link to that in the shownotes so people can find you.

Julie Koenke: Yeah, super.

Amy Climer: Great. Thank you so much for being on the show.

Julie Koenke: Thank you for having me.

Amy Climer: Thank you Julie for being on the podcast!

It is so great to finally have Julie on the show. Even though we live together and we talk about these topics all the time, I learned a lot about managing up and listening to her comments. So hopefully, you did too. Hopefully, that was helpful and will give you some ideas for things you can start working on right away to help you be a better follower, a better collaborator, and a better team member.

If you are new to this podcast, welcome. If you like what you heard, I would love it if you would go over to [iTunes](#) and leave a review. It helps other people find the podcast and it also is great feedback for me. Go to www.climerconsulting.com/itunes, it will send you directly to the podcast and you can subscribe, you can leave a review and you could find the other episodes as well. I also created a shownotes page if you want to get the links that Julie mentioned or an easy way to find her, you can go to www.climerconsulting.com/063. You will also find on the website



all the other podcasts as well as blog posts I have written.

If there is anything you want me to cover on the podcast that you don't see covered yet, anything to do with innovation in teams, send me an email. I love getting your input and your feedback and I will do my best to cover that in a future episode. You can also find my email at www.climerconsulting.com.

Thank you so much for listening. I hope this was helpful. Get out and do the weekly challenge that Julie mentioned. Have a wonderful, creative week. I will see you next time. Bye!