

10 Strategies for “Managing Up”

UW Graduate School Core Programs

“Managing up” is a term that many of you may have heard and it may mean slightly different things to different people. We are defining managing up to mean actively and thoughtfully playing a role in defining and shaping an important relationship that likely involves a power dynamic. Learning to effectively manage up is a skill-set that you can begin to practice with your PIs, advisors, professors, supervisors, etc. and then carry with you to help positively impact your work relationships in the future.

At a recent panel discussion with the Women in Chemical Sciences, we came up with 10 tips for successfully managing up. We would be interested in hearing yours too!

1. Identify what kind of relationship you need to be successful. When beginning a new relationship take some time to think about your goals and expectations. How can this individual support you in being productive and successful? Reflect upon your own personality and specific needs. Are you looking for the person to have a more hands off advisory role or would you prefer them to connect you with some of their contacts in the field? Are you looking for a lot or a little contact? If you take the time to identify what you need, this will help set the tone and drive the direction of the relationship from the start.

2. Set clear expectations about what you are looking for in the relationship. Be transparent from the start about what you are hoping to gain from the relationship. This will not only give the person some direction on how they can best support you, but will also give them the impression that you are taking an active role in meeting your goals towards your own overall success. They will likely appreciate that they do not have to take the lead in the relationship, and may be more inclined to help you with your requests. Keep in mind that even people from the same discipline will have different approaches or ideas about what being an advisor, PI, faculty member etc. entails.

3. Prepare an agenda and send it out beforehand. By setting the agenda for the meeting, you are giving the individual both a heads up about what you are interested in discussing as well as communicating that you are respecting their time and efforts. Even if there is something challenging that you want to discuss, frame your agenda using neutral language, for example “ seeking guidance on how to approach solving x problem.”

4. Follow-up your meeting with an email. Often times in meetings, next steps or action items are discussed for both parties. Sending a follow-up email thanking the person for their time and re-capping what actions items you are going to take on as well as reminding them what they committed to doing will likely be a helpful to them (as well as to you). This will also give you something in writing to go back to which helps hold both of you accountable. In these emails, it can help to include a couple of lines of positive feedback about what role they are playing in your relationship that is especially helpful to you. Positive reinforcement goes a long way, even if it is just one thing you appreciate.

5. Picture your meeting going successfully. Often times meeting with a PI, advisor, professor, or supervisor can be intimidating. Especially, if the person has a reputation for being challenging or could use some improvement on their interpersonal skills. Take some time to visualize your meeting ahead of time and picture it going well. Setting an intention and picturing a positive outcome in your mind can help you walk into that meeting with a positive attitude, and that in itself can set a good tone for the meeting.

6. Find safe conversation partners. After a couple of interactions with someone you may find that the relationship is not progressing in the direction that you wish. Often times talking to people outside of your department can help give you perspective. Run some of your frustrations by your conversation partner, they can be a helpful sounding board for you. You can also have mock or prep conversations with them in advance of your meeting that will help prepare you for the real thing. A trusted colleague or mentor can give you feedback on how you are framing issues in your email agenda or follow-up if you share drafts when it is important to set the right tone.

7. Give people a “generous read”. We are all human and are often juggling many demands and stressors simultaneously. If someone that you are interacting with is not that pleasant, choose to give them the benefit of the doubt - they may have something going on in their life that is challenging. This may help give you a bit of distance and not take their actions personally. If this ends up being an ongoing problem or you have more negative than positive interactions with the person, the next few tips should help.

8. Remember that you deserve respect and the relationship is supposed to serve you. Always keep in mind that in any relationship, even (and especially) when there is a power dynamic, you deserve to be treated with respect. You have the right to a healthy and productive relationship, and if you are getting anything less you can always take steps to tell someone or change advisors, supervisors, PIs etc.

9. Seek additional sources of support. The more you understand your own needs, you can begin to identify whether a single advisor or PI can meet all of those needs, or whether you may need to reach out and build other relationships with faculty, staff, or other students on campus. The Graduate School has been focusing on the idea of a ‘Mentoring Team’ to encourage graduate students to find numerous sources of support. As you move forward in your professional career, you will want to build a strong network to help broaden your potential opportunities.. By starting to build such a network early on in your career, you strengthen your current sources of support for your graduate studies, and build connections that will help you in future career endeavors. Know that you have the power and capability to take an active role in building productive and healthy connections.

10. Know When to Move On. Sometimes a relationship dynamic just does not work, or you find you cannot get what you need from your advisor or research director. Even though it can feel like taking a step backward to change advisors or change lab groups, it can sometimes free you up to do better work and more importantly, to flourish and thrive.

The above tips were adapted from the recent Core Programs/Women in Chemical Sciences sponsored UW Seattle panel discussion, *Managing Up: How to get the most from your PI*. We thank our panelists for their guidance in exploring this topic: *Kelly Edwards* - Associate Dean for Student and Postdoctoral Affairs at the Graduate School, *Susan Terry* – Director of the Career Center, and *Emma Williams* – Associate Ombudsman.