

Influencing Up: A Big Challenge

By Ed O'Neil, Principal, O'Neil & Associates

One of the trickiest and most necessary of all tasks facing leaders is how to lead up. Many people do not even think of this as a leadership responsibility or, if it is, it is not theirs but their boss'. But leading up is critical in order to influence your boss and other organizational leadership, and to properly position your work for organizational, team, and individual success.

Many shy away from this work because it strikes them as something that looks like self-promotion, feels a little slimy, or because they are just not good at it. If you are trying to lead by only influencing down or out, then you are a third less effective than if you skillfully employ the last dimension: influencing up.

Here are a few keys for effectively leading up directly to the person you work with and more generally in an organization.

1. Be Self-Aware

This is a valuable place to start in any leadership endeavor, but when leading up, there are some special considerations to keep in mind. First, do you have the right attitude? Yes, it probably is your boss' job to get your input, and yes, the "higher-ups" could be clearer about the direction of the organization and more consistent in their actions. However, if you are going to be a leader, you will need to influence up — blaming them for shortcomings and being resentful is not a good place to begin. Rather, think through how to get what you need from them: Clarity, a chance for input, or consistency — whatever will help you advance your agenda to make the organization better.

2. Know Their Style

It is essential to be clear about how your organizational leaders like to communicate, receive new proposals, learn bad news, and brainstorm. Everyone is different, and the more you align how you present with how they like to hear information, the more successful you will be. Be concise in the information you provide — save the details for later when you have the opportunity to expand the idea.

3. You Need to Push

Working well with others is an important quality for a leader in any organization. But if you are influencing up and hoping to advance an idea, you need to actively push this agenda and send a strong message that you are the person who can make this change happen. There are a lot of ideas and many people advancing them — why should your organization's leaders choose you? You are *selling* and they are *buying*. Thus, the onus is on you to make the case, not for them to understand.

4. Frame the Big Picture

When you have been working on something for a long time and are presenting it to leadership, most likely you will understand the content better than anyone else will. It has become an important part of your life, and you want to share all of the details with others. They don't care. Rather, they assume you know the details and they do not need to. What they do want to know is what this will solve, how it fits within the bigger strategy, and how it will make things better. Moreover, most of these answers are not in the details. Thus, avoid getting lost in overly technical language, too many micro-level details, and acronyms.

Leadership Tips

Leadership Tips is an ongoing series produced by the Center for Health Care Strategies' Medicaid Leadership Institute in collaboration with O'Neil & Associates. The series is designed to provide general guidance to help leadership of state agencies and their senior managers develop and refine the skills and expertise necessary to successfully lead their state programs. To view the full series, visit www.chcs.org/leadership-tips.



5. Just the Facts

Always have hard numbers around the costs and benefits of the proposal. It is fine to have best — and worst-case scenarios — but do not color this in any way. Be objective.

6. Avoid Stepping on Toes

Understand the broader political context of your proposal from its impact on other parts of the company to how it will be seen by other individuals who are not immediately involved. Regardless of how right you are, someone will usually have to take a political hit when you get the go-ahead.

7. Run It up the Flag Pole (But Not the One out Front)

Before presenting or beginning to advance an idea, pressure test it with your staff, others outside the organization, and senior employees who may not be part of the decision process, but have good judgment and political sensitivity.

8. Get Gradual Buy-In

Test a general concept to learn how those that you need to influence will receive it. This will give you intelligence on what they believe are the important issues, current pressures on them, insights into the competition, and provides an early warning on possible objections. It also gives you a chance to enhance your relationships with all of them.

9. Welcome a Conversation

During the formal presentation, it is important to not over-sell, over-discuss from your perspective, and fail to register the cues you are getting from them. The idea is to share your idea in a general way, giving them the pros and cons, and then allow them the space to explore their concerns with you. Ask for feedback — engaged questioning is a better sign than uncritical acceptance.

Bibliography

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About the Medicaid Leadership Institute

The *Medicaid Leadership Institute*, an initiative of the Robert Wood Johnson Foundation led by the Center for Health Care Strategies, helps Medicaid directors develop the skills and expertise necessary to successfully lead their state programs in an ever-changing policy environment. In addition, CHCS *Medicaid Academies* provide policy and leadership training for senior Medicaid staff as well as colleagues across partnering state and county agencies. Ed O'Neil has advised numerous MLI Fellows and Medicaid senior managers over the past decade. To learn more, visit www.chcs.org/medicaid-leaders.

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