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Managing Up:

Communicating with You PI For Mutual Success

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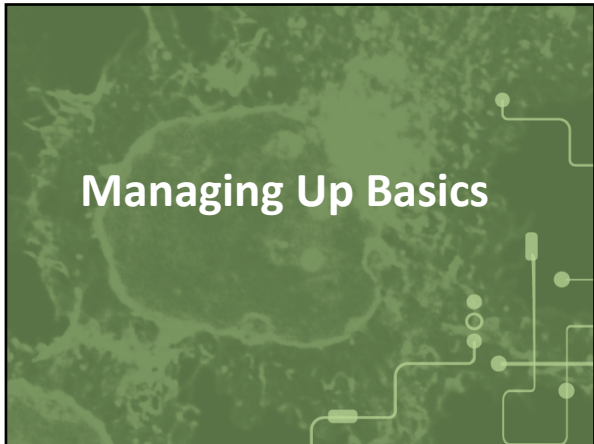
Managing Up

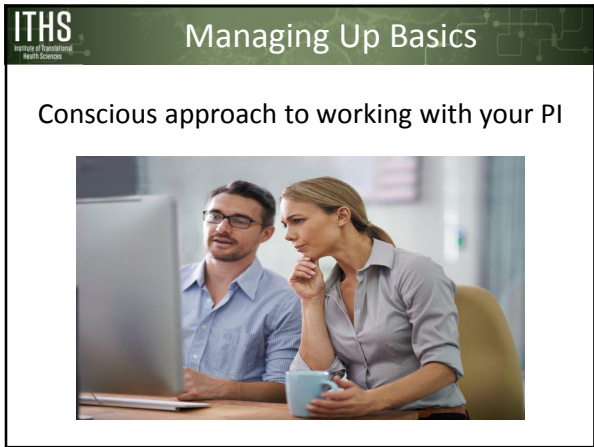


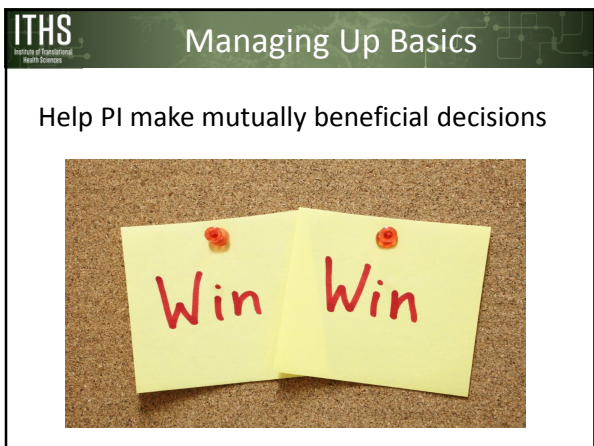
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Learning Objectives

- Managing up basics
- Understand working styles
- Learn effective communication strategies
- Learn negotiation techniques
- Give feedback on case studies
- How you can drive the process








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Managing Up Basics

Utilizes resources to solve problems



A hand is shown writing on a black chalkboard. The word 'PROBLEM' is written in white chalk and has a horizontal line through it, indicating it is crossed out. Below it, the word 'SOLUTION' is written in white chalk. A hand holding a white chalk piece is visible at the bottom right, having just finished writing 'SOLUTION'.

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Managing Up Benefits

The meeting of two personalities is like the contact of two chemical substances; if there is any reaction, both are transformed.

~Carl Jung

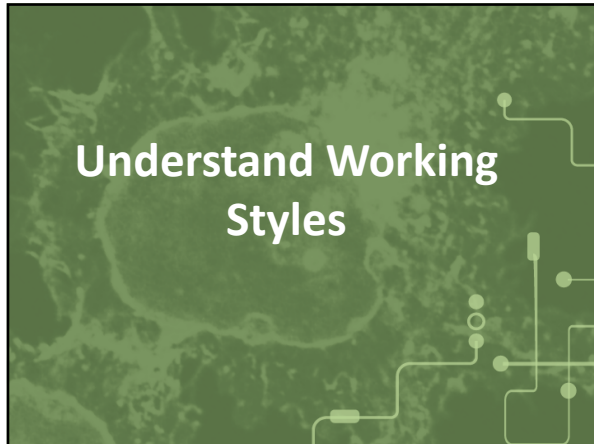
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Managing Up Benefits

- Foster open communication
- Supports the organization.



Two hands are shown holding several colorful speech bubbles of various shapes and colors (pink, blue, orange, green, yellow, purple) against a dark background. The bubbles are arranged in a cluster, with some overlapping.



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Understand Yourself

- What is your personal style?
- What are your strengths, weakness, blind spots, and triggers?

Worksheet for Understanding Yourself

By answering the following questions, you will gain a better understanding of yourself. This helps you communicate more effectively with your manager.

Questions	Notes
1. What is my communication style? Reader or listener?	
2. Am I a detail-oriented person who prefers facts and figures or a big-picture person who prefers just an overview?	
3. Do I prefer to work with a manager who prefers to delegate tasks and has minimal involvement in day-to-day progress, or do I prefer my manager to be more involved with day-to-day involvement in my projects?	
4. What are my key strengths and areas of expertise?	
5. What are my primary weaknesses or blind spots?	

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Understand Your PI

Harvard ManageMentor — MANAGING UPWARD TOOLS

Worksheet for Understanding Your Manager

By answering the following questions, you will be better prepared to communicate effectively with your manager.

Question	Notes
1. What is my manager's communication style? Reader or listener?	
2. Is my manager a detail-oriented person who prefers facts and figures or a big-picture person who prefers just an overview?	
3. Does my manager prefer to delegate tasks and have minimal involvement in day-to-day progress or to have hands-on, day-to-day involvement in my projects?	
4. What are my manager's key strengths?	
5. What are my manager's primary weaknesses?	
6. What are the hot buttons or triggers that prompt quick reactions?	

Communication Strategies

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Communication Approach



- Listen actively
- Offer verbal and nonverbal feedback
- Withhold judgement
- Note clarifications you have
- Check for agreement on key points

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Listening Techniques

Three Levels of Listening


The "What"	Focus on content	Thoughts
The "How"	Focus on emotions	Feelings
The "Why"	Focus on intentions	Impact

Negotiation Techniques

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Negotiating with Your PI

- Show awareness of project importance
- Establish expectations on the timeline
- Solicit help about other deadlines
- Suggest alternatives for mismatched priorities



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Negotiating a Trade-Off



- Move small deadlines
- Identify priorities
- Clarify expectations
- Break the work into chunks
- In future, give input from the beginning
- Partner with others
- Find/create reusable resources
- Add technology

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Negotiate Strategically

- Use words like “both,” “we,” and “I”
- Focus on a “win-win” approach
- Emphasize benefits
- Don’t dump the problem on your PI
- Listen carefully and ask for clarification
- Avoid becoming defensive

Case Studies

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What Would You Do?

#1. My PI is always coming up with new ideas/projects/collaborations which is very exciting however as the coordinator, it is hard to know what to focus on and what my priorities should be. I’m not sure how to communicate how much time and work it will take to get it all done.

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What Would You Do?

#2. I work for multiple studies and PIs in a growing research program. I have ideas to improve the start-up process for studies in the group, but 2 of the researchers don't like change, and they are concerned it will take me away from other work. These changes will streamline my work and get studies started more quickly. I'm not sure how to get them to see my perspective.

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How You Can Drive the Process

- View the relationship as a partnership
- Ask your PI to share goals/objectives
- Recognize your shared objectives
- Drive the results and strive to exceed them
- Be open to feedback and advice
- Share anticipated problems before a crisis hits
- Find solutions together





Resources

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Resources and More Information

--UW Professional and Organizational
Development: <https://ucs.admin.uw.edu/pod>
--Seattle Children's Learning & Organizational
Effectiveness:
--lynda.com:

- Building Business Relationships
- Management Fundamentals
- Having Difficult Conversations
