



# **Managing Up Playbook: Influence Without Authority**

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Managing up isn't about flattery, politics, or saying yes to everything. It's about building a healthy, effective working relationship with your leader — one where you protect your own priorities, contribute meaningfully to theirs, and speak up with clarity and confidence.

Too often, professionals feel stuck in reactive mode — overloaded, underheard, and unsure how to push back without sounding resistant. The truth is: influence isn't about job titles. It's about how you show up.

This toolkit is designed to help you shift from reactive to strategic. Inside, you'll find practical tools to:

- Understand what your boss actually cares about
- Communicate boundaries without sounding defensive
- Plan and deliver respectful pushback
- Build trust through preparation and follow-through

These tools are not scripts to memorize — they're flexible frameworks to adapt to your own voice, role, and organization. Use them as thought starters, prep guides, and confidence boosters as you learn to manage up more effectively.

Managing up is one of the highest-impact skills you can develop — and it gets easier with practice.

Let's start with the foundation: understanding their priorities.

### **Step 1: Map Their Priorities – Leadership Lens Worksheet**

Before you can influence your boss's decisions, you need to understand what drives them. What keeps them up at night? What do they measure, reward, and revisit again and again?

Too often, people make the mistake of managing up from their own perspective — talking about what *they* want, need, or feel. The secret to building influence is flipping the lens. You start by understanding *their* world.

This worksheet helps you decode what your boss values, so you can frame your conversations in ways that matter to them.

#### **Observe and Reflect**

Take 10–15 minutes to answer the following:

1. What are the top 2–3 metrics your boss is accountable for? (*Examples: on-time delivery, cost control, compliance, customer satisfaction*)

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2. What themes or topics come up repeatedly in meetings, emails, or hallway conversations?

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3. What kinds of updates do they ask for most often?

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4. What words or phrases do they use regularly? (*Examples: "risk," "efficiency," "visibility," "escalation," "cross-functional"*)

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5. What gets their immediate attention or escalation?

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### Analyze the Pattern

Now list the top 2–3 leadership drivers you’ve observed. These might be business outcomes (like profitability or brand reputation) or personal values (like responsiveness, speed, or innovation).

#### My Boss’s Key Drivers:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Application Prompt

Think about a recent ask from your boss. Could you have framed your response differently to reflect one of their top drivers?

*Example: Instead of saying “I’m at capacity,” you might say, “To maintain our speed to market, I’d need to delay this by a week or delegate part of it. Which option works best for you?”*

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When you speak in terms of what your boss values, you reduce friction, increase alignment, and elevate your credibility.

### Step 2: Protect Your Priorities – Saying “No” Without Saying “No” Script Builder

Saying “no” to your boss may feel risky. But when your bandwidth is maxed and priorities are at stake, saying nothing is riskier. The key is learning how to push back respectfully — framing your message around trade-offs, solutions, and shared outcomes.

Below are three go-to approaches for protecting your priorities without damaging your relationships.

#### Approach 1: Trade-Off Framing

Use when you’re already at capacity and want your boss to help set priorities.

**Script Starter:** “I’d be happy to take that on. Given my current workload, I’d either need to shift the X deadline or pause Y for now. Which would you prefer?”

**Why it works:** It positions you as a solution-focused partner, not someone resisting work.

**Your Turn:** What current ask could you reframe using this approach?

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### Approach 2: Invite Prioritization

Use when multiple requests are competing for your time and clarity is needed.

**Script Starter:** “I want to make sure I’m focused on what matters most. Between A, B, and C, which do you want me to prioritize first?”

**Why it works:** It shows initiative while prompting your boss to clarify urgency.

**Your Turn:** List 2–3 active projects or tasks you could use in this conversation:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

### Approach 3: Define What Would Make It Work

Use when you’re not flat-out refusing, but conditions must change for success.

**Script Starter:** “Here’s what would need to happen for me to take this on and do it well...”  
(Then list needed support, delay, delegation, or resources.)

**Why it works:** It opens the door to negotiation while reinforcing your commitment to quality.

**Your Turn:** What would you need to make a current over-the-top request feasible?

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### Pro Tips – Language to Avoid:

- “I can’t.” → Try: “Here’s what I’d need to adjust to make this work.”
- “That’s not my job.” → Try: “Let’s look at the team’s workload and see where this fits best.”
- “I’m too busy.” → Try: “To protect our deliverables, I’d need to shift priorities.”

### Step 3: Prepare for the Tough Conversation – Upward Conversation Planner

Whether you're overwhelmed, misaligned, or simply need to reset expectations, preparing for a tough conversation makes all the difference. This planner helps you get clear before you speak up.

#### 1. Clarify Your Objective

What outcome do you want from the conversation?

Example: “Align on realistic timelines for Projects A and B.”

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### 2. Define Your Request

What are you asking your boss to support, clarify, or change?

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### 3. Align with Their Priorities

Which of their top drivers (from Section 2) will you reference in your message?

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### 4. Anticipate Pushback

What objections or concerns might they raise?

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How will you respond to those?

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### 5. Draft Your Opener

Use calm, clear language to set the tone and context.

**Script Starter:** "I want to make sure I'm supporting your top priorities. Here's what I'm seeing right now..."

Your version:

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### 6. Plan the Follow-Up

How will you document or confirm next steps? (e.g., recap email, shared notes, status update)

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### **Step 4: After the Meeting – Debrief & Follow-Up Checklist**

Managing up is an ongoing process — not a one-and-done event. Use this checklist to stay aligned, accountable, and aware of your impact.

#### **After the Conversation:**

- ☐ I captured agreed-upon decisions or next steps
- ☐ I documented what I need to do — and what they agreed to
- ☐ I sent a short follow-up note (if needed)
- ☐ I reflected on what worked well and what I'd change next time
- ☐ I updated my priorities and calendar accordingly
- ☐ I acknowledged progress or follow-through in the next check-in

#### **Optional Reflection Prompt:**

What's one thing I did in this conversation that helped me lead up effectively?

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What's one thing I'd approach differently next time?

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### **Final Thoughts**

Managing up isn't about winning arguments or dodging work. It's about creating clarity, alignment, and mutual success — especially when resources are tight and priorities compete.

By using these tools, you're doing more than protecting your time. You're building trust, demonstrating leadership, and learning to guide outcomes from any level of the organization.

Influence grows with practice. Keep showing up with clarity, curiosity, and courage — and you'll be amazed how far it takes you.