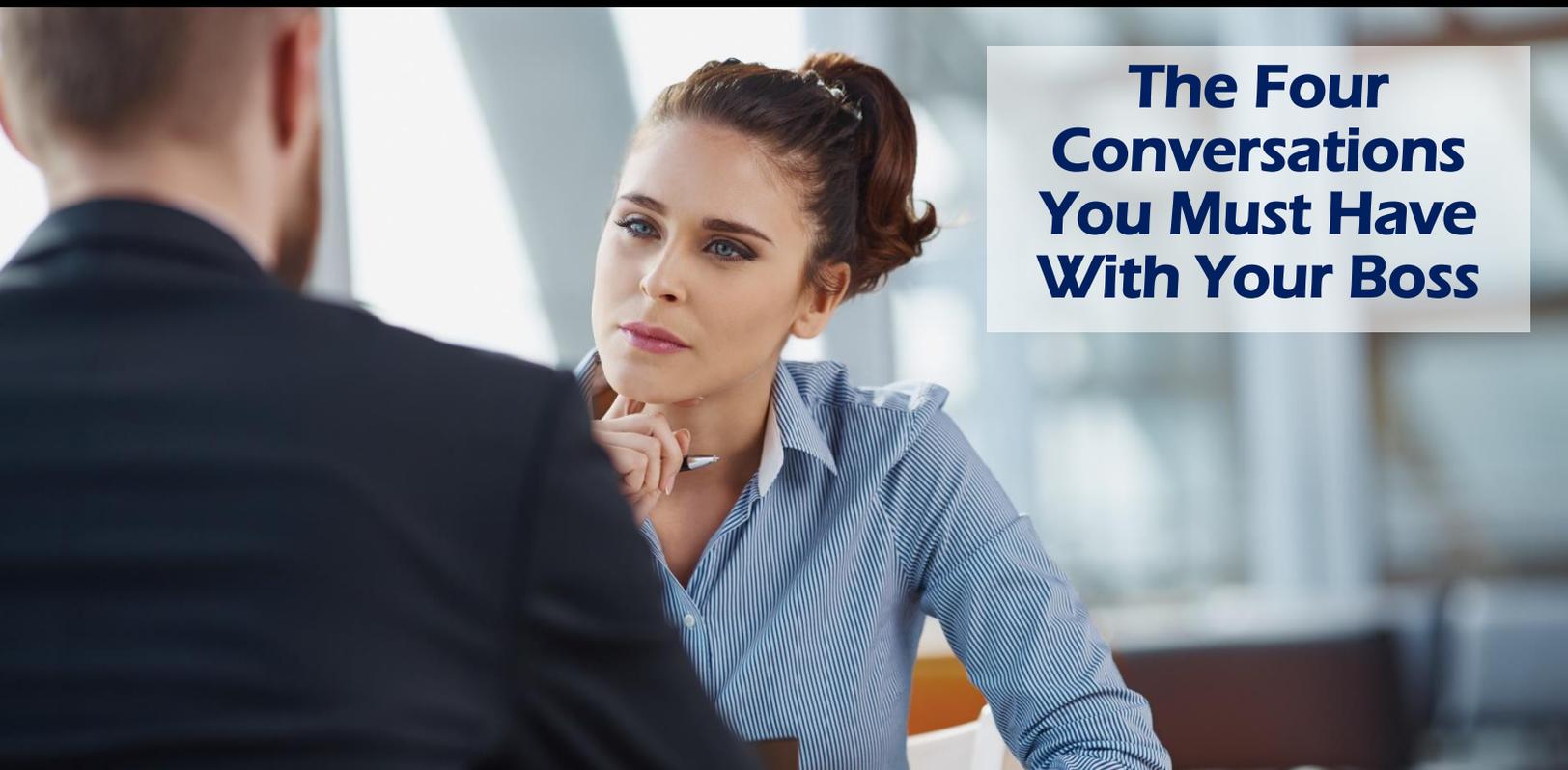




Leadership Essentials



**The Four
Conversations
You Must Have
With Your Boss**

PARTICIPANT GUIDE

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Participant Guide

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Objective: This lesson is designed to strengthen the relationship with the most important person to your success as a manager.

Four Conversations You Must Consistently Have With Your Manager

Conversation #1 – Situational Perception

Goal: Help you understand how your boss perceives the business challenge you are facing.

Challenge: Identify challenges and opportunities based on your unique business challenge. Think about your role and the current state of your organization. Answer the following questions:

Which of the four business challenges is your organization currently facing?

Do you believe your manager agrees with your assessment? What objective information could you share to make your point?

What kind of changes are you being asked to make?

What are the biggest challenges facing your organization?

How must the organization change to be successful?

What do you need to focus your attention on?

"The better you get at reading the landscape, the more effective you get at leveraging the system that you are in, and applying your effort in ways that make the most impact."

~ J.D. Meier

Conversation #2 – Expectations & Drivers

Goal: Understand what your boss wants from you and within what time period.

Challenge 1: Reflecting on your current boss, answer the following questions:

What is your boss's vision and goals for the business and why?

What are your boss's drivers and why?

What matters most for your boss? What is their biggest concern?

How can you specifically help your manager reach their goals?

Challenge 2: Reflecting on your current role in your organization, answer the following questions:

Identify two short-term and two-long term goals your manager expects you to achieve in your current role.

How would your boss prioritize your goals?

How will you be measured and within what time frame?

What quick victories does your manager expect from you in the next 3-6 months? How will success be measured?

"I didn't change the type of leader I was, but I certainly made sure to deliver what each new leader was looking for, in my way." ~ Ian Mathews

Challenge 3: What is your organization's sacred cow?

What are typically unspoken rules or truths that everyone in your organization has come to accept? Would your manager agree?



Tip: One way to surface a potential sacred cow is by asking your manager to share the origin of a process, product or person. Understand how it came to be and determine if the same needs and circumstances exist today.

Conversation #3 – Resources & Autonomy

Goal: Understand all your internal support and budget for external help.

Challenge: Reflecting on your current role, answer the following questions:

What are the open positions on your team, and can you fill them? If not now, when?

What positions need to be created, and why?

In your manager's opinion, who are the stars on your team and why do they consider this person(s) a star?

Which people does your manager believe are not going to make it and why?

What funding do you have for critical initiatives? Are there authority limits on spending?

What resources in the organization can you utilize?

What authority limits do you have on funding and personnel? What are the open positions on your team, and can you fill them? If not now, when?



"You will only be as good as your team, and the leader's first order of business is building the best team possible."
~ Ian Mathews

Conversation #4 – Communication & Style

Goal: Understand your boss's preferences for communication.

"Far too few people even know that there are readers and listeners and that people are rarely both. Even fewer know which of the two they are."
~ Peter Drucker

Challenge: Reflecting on your current boss, do you have answers to the following questions? Check the questions that you have answers for:

- What's your manager's preferred communication method?
- Is your manager a reader/writer or talker/listener?
- What level of detail does your manager want?
- What topics interest your manager most?
- What is their typical response time?
- Do they respond to some mediums faster than others?
- How often does your boss want to be copied?
- What is your manager's preferred decision-making process?
- What areas do they want you to own and handle without bothering them with detail?
- What time of day would your manager prefer to be left alone?
- When is the time when your manager does independent work and thinking?
- What times is your manager most interested in talking or meeting?
- What times do you observe that your manager is in the best or worst mood?
- How does your manager like to receive information and how often?
- What is the typical length of your manager's emails?
- Is your boss a driver? Do they get right down to business? Do they prefer bullet points to details?
- Is your boss expressive, analytic, or amiable?

Note: If you only checked a few questions, it's time for a conversation!

"It is up to you to adjust your style to match your boss's preferences for communication, not the other way around."

~ Ian Mathews

Prepare for the Conversation

The first step in approaching any conversation is to gather your thoughts and inform the other person that you would like to schedule a meeting/conversation. Proper preparation will make this conversation less intimidating and more effective.

How Do I Begin the Conversation?

When setting this agenda, state the topic of the conversation and the benefit you both will gain from the conversation. Try an approach of, "I would like to discuss, so that..." approach.

- I would like to discuss my team with you, so that we can build a stronger team together.
- I'd like to talk about our marketing budget with you, so that we can agree on spending that maximizes our return.
- I would like to talk about your expectations of me and my team, so that we can deliver exactly what you are looking for by your expected timeline.

Challenge: Write a possible opening for your conversation here:

During the Conversation

Step #1: Inquiry

Cultivate an attitude of discovery and curiosity. Pretend you don't know anything and try to learn as much as possible about your boss and his perspectives. Consider these questions as you listen: What does your boss really want? What is he/she not saying? Listen as if your only job is to understand. Remember to stick with open-ended questions (why, what, how) to encourage discussion and make things feel less like an interrogation.

Step #2: Recognition & Acknowledgment

Acknowledgment means showing that you've heard and understood. Try to understand your boss's view and honor his/her position. Acknowledge whatever you can. You can decide later how to address it. Acknowledgment helps both parties remain centered. Note that acknowledgment can be difficult if we associate it with agreement. Keep them separate. You can recognize a different perspective without agreeing with it. Saying, "this sounds really important to you," doesn't mean you are going to go along with everything he/she says.

Step #3: Advocacy

When you sense your boss has expressed all their thoughts on the topic, it is your turn. What can you see from your perspective that they might be missing? Clarify your position, without minimizing theirs, and ask for any missing pieces or clarifications. "That's a very helpful perspective, do you mind if I share what I have seen from the position I am in?"

Step #4: Problem-Solving

Brainstorming and continued inquiry are useful here. Ask your boss what they think might work. Whatever they say, find something you like and build on it. Asking for the other's point of view usually creates safety and encourages them to engage. Ask what has been tried in the past and what has been successful. Ask what approaches have failed in the past and what to avoid.

Next Steps – Follow-up Tips

A common mistake that managers make is not following up after a conversation. You should have taken meeting notes and identified next steps. Make sure that the conversation doesn't go to waste.

Here are a few tips to help you follow up after your conversation:

- Send a follow-up email or communication to thank your manager for taking the time to meet with you and summarize the actions you both agreed on.
- Put your notes in a central place. Be sure that your boss has access to the notes you took during the conversation, so that he/she can clearly see any next steps identified.
- Identify short-term goals that you can focus on and set a follow-up date to report back on progress on commitments. This will hold both of you accountable.
- Create a baseline by consistently asking your boss for their outlook after your conversations. Has their outlook gotten worse, better or stayed the same? Monitoring this long-term can help you track engagement and identify red flags faster.
- Follow up, follow up, follow up! What's the point of making decisions and setting action items if you don't check in on them? Set reminders to consistently re-visit the highlights from this initial discussion.