CHECKLIST FOR MANAGING YOUR BOSS

Make sure you understand your boss and his or her context, including:

☐ Goals and objectives

☐ Pressures

☐ Strengths, weaknesses, blind spots

☐ Preferred work style

Assess yourself and your needs, including:

☐ Strengths and weaknesses

☐ Personal style

☐ Predisposition toward dependence on authority figures

Develop and maintain a relationship that:

☐ Fits both your needs and styles

☐ Is characterized by mutual expectations

☐ Keeps your boss informed

☐ Is based on dependability and honesty

☐ Selectively uses your boss’s time and resources

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<th>Style</th>
<th>Decision-Maker’s Characteristics</th>
<th>Prominent Examples</th>
<th>Persuader’s Strategy</th>
<th>Examples of How to Approach Them</th>
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| Charismatic | - Easily enthralled, but bases decisions on balanced information  
             - Emphasizes bottom-line results                              | Lee Iacocca  
                          Herb Kelleher                  | - Focus on results  
                          - Make straightforward arguments  
                          - Stress proposal’s benefits with visual aids                  | - Diagram your current organization and the problem(s), proposed solution(s), and benefits—especially improved competitiveness  
                          - Explain potential challenges and risk of inaction  
                          - Provide detailed reports for your boss to review postpresentation |
| Thinker    | - Toughest to persuade  
             - Cerebral, logical  
             - Risk-averse  
             - Needs extensive detail                                      | Michael Dell  
                          Bill Gates                                    | - Present market research, customer surveys, case studies, cost/benefit analyses  
                          - Help your boss understand all perspectives of a given situation | - Present different options in detail in a face-to-face meeting  
                          - Explain your data-gathering methods  
                          - Present case studies of similar initiatives  
                          - Use a follow-up meeting to fill argument gaps and recommend optimum plan  
                          - Wait weeks, months for your boss’s decision                  |
| Skeptic    | - Challenges every data point  
             - Decides based on gut feelings                                 | Larry Ellison  
                          Tom Siebel                                        | - Establish credibility ahead of time with your expertise; draw on positive previous work experiences  
                          - Get endorsements from someone your boss trusts              | - Copresent with a trusted colleague  
                          - Emphasize the credibility of your sources of information  
                          - Stroke your boss’s ego (“You’ve probably seen this case study…”)  
                          - Ground your argument in the real world                       |
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<th>Controller</th>
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| - Relies on own or others’ past decisions to make current choices  
- Late adopter | - Unemotional, analytical  
- Abhors uncertainty  
- Implements only own ideas |
| - Carly Fiorina  
- Peter Coors | - Martha Stewart  
- Ross Perot |
| - Use testimonials to prove low risk  
- Present innovative, yet proven, solutions | - Present highly structured arguments  
- Make your boss “own” the data  
- Avoid aggressive advocacy |
| - Highlight case studies from other industries, but note “We could be the first in our industry to do this.”  
- Omit failed real-world examples (although you should have this information available should your boss request it)  
- Present multiple options  
- Tap your network for references to steer your boss toward your preferred choice; emphasize the option’s affordability, etc. | - Over several months, send your boss customer reports, marketing studies, financial projections; give him everything he needs to build your case for you  
- Emphasize data highlighting the company’s challenge  
- Identify data contradictions, but let your boss analyze them  
- Wait for your boss to request a meeting after a significant incident (e.g., a large customer defects) |
# THE IDEA IN PRACTICE

## The Five Components of Emotional Intelligence

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<th>Component</th>
<th>Definition</th>
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<th>Example</th>
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| Self-Awareness| Knowing one's emotions, strengths, weaknesses, drives, values, and goals—and their impact on others | - Self-confidence  
- Realistic self-assessment  
- Self-deprecating sense of humor  
- Thirst for constructive criticism | A manager knows tight deadlines bring out the worst in him. So he plans his time to get work done well in advance. |
| Self-Regulation| Controlling or redirecting disruptive emotions and impulses                | - Trustworthiness  
- Integrity  
- Comfort with ambiguity and change | When a team botches a presentation, its leader resists the urge to scream. Instead, she considers possible reasons for the failure, explains the consequences to her team, and explores solutions with them. |
| Motivation    | Being driven to achieve for the sake of achievement                     | - A passion for the work itself and for new challenges  
- Unflagging energy to improve  
- Optimism in the face of failure | A portfolio manager at an investment company sees her fund tumble for three consecutive quarters. Major clients defect. Instead of blaming external circumstances, she decides to learn from the experience—and engineers a turnaround. |
It was Daniel Goleman who first brought the term “emotional intelligence” to a wide audience with his 1995 book of that name, and it was Goleman who first applied the concept to business with his 1998 HBR article, reprinted here. In his research at nearly 200 large, global companies, Goleman found that while the qualities traditionally associated with leadership—such as intelligence, toughness, determination, and vision—are required for success, they are insufficient. Truly effective leaders are also distinguished by a high degree of emotional intelligence, which includes self-awareness, self-regulation, motivation, empathy, and social skill.

These qualities may sound “soft” and unbusinesslike, but Goleman found direct ties between emotional intelligence and measurable business results. While emotional intelligence’s relevance to business has continued to spark debate over the past six years, Goleman’s article remains the definitive reference on

| Empathy                      | Considering others’ feelings, especially when making decisions | • Expertise in attracting and retaining talent  
|                             |                                                              | • Ability to develop others  
|                             |                                                              | • Sensitivity to cross-cultural differences  
|                             | An American consultant and her team pitch a project to a potential client in Japan. Her team interprets the client’s silence as disapproval and prepares to leave. The consultant reads the client’s body language and senses interest. She continues the meeting, and her team gets the job. |
| Social Skill                | Managing relationships to move people in desired directions | • Effectiveness in leading change  
|                             |                                                              | • Persuasiveness  
|                             |                                                              | • Extensive networking  
|                             |                                                              | • Expertise in building and leading teams  
<p>|                             | A manager wants his company to adopt a better Internet strategy. He finds kindred spirits and assembles a de facto team to create a prototype website. He persuades allies in other divisions to fund the company’s participation in a relevant convention. His company forms an Internet division—and puts him in charge of it. |</p>
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<td><strong>Self-Awareness</strong></td>
<td>the ability to recognize and understand your moods, emotions, and drives, as well as their effect on others</td>
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<td>the ability to control or redirect disruptive impulses and moods</td>
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<td>the propensity to suspend judgment—to think before acting</td>
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<td><strong>Motivation</strong></td>
<td>a passion to work for reasons that go beyond money or status a propensity to pursue goals with energy and persistence</td>
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<td><strong>Empathy</strong></td>
<td>the ability to understand the emotional makeup of other people skill in treating people according to their emotional reactions</td>
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<td><strong>Social Skill</strong></td>
<td>proficiency in managing relationships and building networks an ability to find common ground and build rapport</td>
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<tr>
<td>Principle</td>
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<td><strong>Liking:</strong>&lt;br&gt;People like those who like them.</td>
<td>At Tupperware parties, guests’ fondness for their host influences purchase decisions twice as much as regard for the products.</td>
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<td><strong>Reciprocity:</strong>&lt;br&gt;People repay in kind.</td>
<td>When the Disabled American Veterans enclosed free personalized address labels in donation-request envelopes, response rate doubled.</td>
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<td><strong>Social Proof:</strong>&lt;br&gt;People follow the lead of similar others.</td>
<td>More New York City residents tried returning a lost wallet after learning that other New Yorkers had tried.</td>
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<td><strong>Consistency:</strong>&lt;br&gt;People fulfill written, public, and voluntary commitments.</td>
<td>92% of residents of an apartment complex who signed a petition supporting a new recreation center later donated money to the cause.</td>
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Authority:
People defer to experts who provide shortcuts to decisions requiring specialized information.

A single *New York Times* expert-opinion news story aired on TV generates a 4% shift in U.S. public opinion.

Don’t assume your expertise is self-evident. Instead, establish your expertise before doing business with new colleagues or partners; e.g., in conversations before an important meeting, describe how you solved a problem similar to the one on the agenda.

Scarcity:
People value what’s scarce.

Wholesale beef buyers’ orders jumped 600% when they alone received information on a possible beef shortage.

Use exclusive information to persuade. Influence and rivet key players’ attention by saying, for example: “...Just got this information today. It won’t be distributed until next week.”

Robert B. Cialdini is the Regents’ Professor of Psychology at Arizona State University and the author of *Influence: Science and Practice* (Allyn & Bacon, 2001). Further regularly updated information about the influence process can be found at http://www.influenceatwork.com/.
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<th>How to work with them</th>
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| Boomers (born    | • Hold a deeply competitive world view; see most scenarios as win-lose  
| between 1946 and 1960) | • Are hardworking and driven  
|                  | • Value individual achievement and recognition  
|                  | • Question authority and hierarchy, yet feel pressure to follow established rules and procedures  
|                  | • Are idealistic, but have by and large put “lofty” personal goals on the back burner for the past 30 years  
|                  | • Are often parents of Gen Ys and inclined to enjoy members of this generation  
|                  | • Enjoy mentoring others and the idea of leaving a legacy                                                                                                                                                               | OVERALL:                                                                                                      |
|                  | **Emphasize winning:** Explain how your idea either represents a “win” or will make the organization (or individual) more competitive. For instance, if you’re offering a Boomer a new position in the company, comment on how you’ve chosen her over numerous other candidates. Or if you’re proposing a new marketing investment, discuss how it will thwart a competitor’s program.  
|                  | **Seek their counsel:** Appeal to their desire to pass on their knowledge. You might ask a Boomer for advice on how to get her boss’s attention, for example, or for help analyzing a problem that keeps cropping up.  
|                  | **IF YOU’RE A GEN XER:**  
|                  | • Spell out your career goals: Clearly convey your aspirations to any Boomers with influence on your career well before you’re up for a promotion or new role. Don’t assume they’ll automatically know where you’d like to end up long term or what kind of development path you’d prefer. Their well-intentioned ideas may be quite different from your own.  
<p>|                  | • Overcommunicate: Be transparent in your approach to projects or problem solving. You’re more likely than your Boomer colleagues to consider multiple options. Explain how and when you’ll make decisions so Boomers will recognize the time |</p>
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| Gen Xers (born between early 1960s and late 1970s) | • Are self-reliant  
• Don’t trust any institution (corporations, ...) | you’re spending as due diligence, not misconstrue it as indecision or procrastination.  
• **Partner with them:** Tap their experience and networks. For example, invite a Boomer to join your skunkworks team. When you’re ready to pitch the best ideas to your executive board, she can help socialize the top contenders with her peers, which may help speed buy-in. She can also raise potential concerns early on—helping you dodge delays at the implementation phase. |
|                           |                          | **IF YOU’RE A GEN Y:**  
• **Ask them for mentoring:** Pair your enthusiasm for learning with a Boomer’s expertise and desire to give back. For example, share your most pressing project management problems with him and discuss potential solutions. In return, offer him tutorials on social media or time-saving technologies.  
• **Make sure your written communication is professional:** Boomers are more likely than others to base judgments on the way you present your ideas. Express your recommendations concisely, using correct grammar and spelling. Describe the financial benefits of your suggestions when possible. |

**OVERALL:**  
• **Weigh your options:** Most Xers want to know that you’ve considered...  
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<td>marriage, and so on) to take care of them forever</td>
<td>contingencies. Earn their respect and buy-in by including a discussion of “what if” when you present ideas to them. For instance, identify the two or three events or trends that would be most likely to disrupt your proposed course of action—and the response you would recommend taking if each one were to occur.</td>
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<td>Like to keep their options open</td>
<td><strong>Let them choose:</strong> Whenever possible, present a menu of solutions and engage the Xer (whether she is your boss, colleague, or subordinate) in the process of choosing the best one. You might, for example, ask her what weight she would give to various decision criteria.</td>
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<td>Are irreverent</td>
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<td>Think outside the box and are comfortable changing the rules as necessary</td>
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<td>Accept the validity of diverse points of view</td>
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<td>Have close relationships within a small group of friends (their “tribe”)</td>
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<td>Place high priority on being good parents</td>
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**IF YOU’RE A BOOMER:**

- **Employ their innovative thinking:** Ask an Xer to help solve a problem or reality-check your solution to make sure you’re viewing the challenge from every possible angle. For example, invite him to test the validity of your strategy statement by posing a broad range of scenarios you might not have considered on your own.
- **Harness their ability to integrate multiple points of view:** Invite an Xer to lead a complex group discussion—for instance, an after-action review. She’s likely to ensure that everyone is heard so you’ll have a fuller picture of what worked well and what needs improvement.
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<td>IF YOU’RE A GEN Y:</td>
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| Gen Ys (born between 1980 and the mid-1990s) | • Expect to live life fully each day  
• Are optimistic and confident  
• Prefer to work on their schedule, not yours  
• Are hungry to learn; expect regular coaching  
• Get things done using in-the-moment coordination rather than long-range planning  
• Work collaboratively  
• Have limited awareness of corporate hierarchy and protocol  
• Are comfortable expressing opinions freely and bluntly  
• Enjoy and respect their parents and tend to retain close relationships with them | • **Explore common ground:** Make the most of your shared passion for discovering new ways of working. For example, ask an Xer to help you analyze and improve your cross-functional team’s processes. Or work together to find opportunities to leverage new technology in the organization.  
• **Respect the dues they’ve paid:** Most Xers have worked their way up a long career track and may feel threatened by the perception that you want to “leapfrog” past them. When you express your desire for more challenging work, be clear that you’re not looking to take their seat.  

**OVERALL:**  
• **Ramp up the challenge:** Give stretch assignments to maintain their interest. For example, ask a Gen Y to prepare a draft proposal for a client. You’ll free up more of your time for other priorities, and he’ll feel that he’s making career progress. Or specify an outcome you need to achieve, but leave the approach to his discretion. Encourage him to find ways to do it better. Tell him, for instance, that the sales team needs to understand and get excited about a new product’s features by the planned launch date, but invite him to propose the communication and training plan.  

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<td>• Put their work into context: Explain how what they do affects the larger organization. For example, invite a Gen Y to your next marketing meeting so she can see how the daily sales dashboard she’s setting up will help your group accurately track the impact of different campaigns.</td>
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<td>• Provide frequent feedback: Take every opportunity to teach them. After a brainstorming session, for instance, pull your Gen Y direct report aside to note how useful it was for him to help facilitate. Give him a few specific suggestions on how he could do it even more effectively next time.</td>
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<td>IF YOU’RE A BOOMER:</td>
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<td>• Clarify how you’ll communicate with each other: Agree on “rules” everyone feels comfortable with. For example: How frequently will you exchange e-mails or text messages? Will you share questions and thoughts as they come to mind or save them for a weekly status meeting? Work together to accommodate your different preferences.</td>
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<td>• Tap their technological prowess: Gen Ys are great sources of tech support, often without realizing it. Task a Gen Y with test-driving new software, for example, or looking for shortcuts in the sales-reporting process.</td>
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