

How to Manage Work Without Formal Authority

A reader asks:

“Managing staff members is hard enough, but at least the roles are clear! What about when you have to manage work and don’t have formal authority over the people doing it? I tend to just let them know what I need and then hope for the best. Is there another way?”

You’re right that as challenging as managing staff members can be, managing work when you don’t have formal authority can be even more challenging. Influencing the performance of people who don’t report to you – or “managing sideways” – takes special thought.

Interestingly, effectively managing sideways means doing the same things that you do when you’re managing direct reports: setting up clear roles and responsibilities, being clear about the work’s desired outcomes, checking in on progress, and so forth. But when you’re managing sideways, it helps to take extra care in how you approach your colleagues with each of these items. Here are five tips for doing it well.

1. Constantly share the “why.” While you should always explain the larger context – the “why” – when you’re delegating to a staff member, it’s especially key to do this when you’re delegating sideways. As a peer, you lack the authority to simply assign work – but your requests will go over a lot better if you contextualize them and explain their importance. For example, in pulling someone in to help with a last-minute email alert, you might say, “We just learned about this today and if we can generate grassroots calls by tomorrow morning, we have a real chance of bringing the bill up for a vote before the legislature adjourns for the year.”

2. Communicate roles clearly. When you’re delegating to a peer, it’s easy to inadvertently miscommunicate what you’d like that person’s role to be, as well as what yours is. That can lead to situations where, for example, your colleague assumes that they will be the ultimate decider of the content of a web page you’ve asked them to create when in fact you’ll be making the final calls. This can create more awkwardness down the road than if you just clarify from the very start – saying something like, “Once you have proposed content, I’d like to sign off and might make some changes before we finalize it.” Or, even better, share the “why” here too, and say something like, “Once you have proposed content, I’d like to sign off and might make some changes before we finalize it – because there are some tricky nuances with donors that I want to make sure we navigate.”

(TMC’s **MOCHA model** (<http://www.managementcenter.org/resources/assigning-responsibilities-worksheet/>) for communicating responsibilities can be especially useful when you’re managing sideways. For instance, you might say something like, “Could you own getting all the content for this together?” or “While Ana will make the final decision, I’m dying for your input on this and would like to use you as a C.”)

3. Don’t hide the message. Sometimes when people feel awkward about managing sideways, they end up softening the message to the point that the other person doesn’t realize what’s being communicated. For instance, you might need a draft of a report by March 15 so that the final can go to the printer by March 25. But if you instead

say, “It would be great to see a draft around the middle of the month, and I’d love to have it to the printer by March 25 if we can,” you won’t be conveying hard deadlines at all – and your colleague might justifiably think you have more flexibility than you do. Make sure that they’re as clear as you are about deadlines, constraints, and other relevant factors. And yes, that might mean being more directive than you’re comfortable being, but that’s much more fair to them than setting her up for a misunderstanding.

4. Check in regularly. When you don’t have authority, you can’t assume that work is progressing on its own simply because you asked someone to take care of something. (Of course, you shouldn’t assume that when you have authority either, but it’s especially true with peers.) Instead, assume that you’ll need to check in and make sure the work is on track – which means finding ways to engage as the work moves forward, so that you can ensure the work is being completed according to plan or that the plan is adapted as needed. For instance, you might say, “I want to be able to adjust our marketing plans if ticket sales are lagging, so could we plan to touch base each week about ticket numbers?” Or, “I’d love to get a better feel for how the training sessions are playing out. Would you mind if I sat in on an upcoming one?”

You can do this by (a) directly checking in about how the work is going, (b) reviewing a “slice” of large projects as they progress, (c) reviewing data indicating progress toward the desired outcome, such as a monthly report on progress toward a fundraising goal or a weekly report on ticket sales for an event you’re managing, and/or (d) seeing the work firsthand, such as joining your colleague on a lobbying visit or sitting in on a training session.

5. Act with confidence – or acknowledge the awkwardness. If you feel uneasy about any of the above – assigning work to a colleague, checking in on slices, etc. – it will probably show, and make the encounter (and possibly the relationship) awkward. The work and the relationship will go far more smoothly if you instead act with confidence, treating the interaction as if it’s perfectly normal (even if you feel anxious or awkward inside). Alternately, if it feels more natural to you, you can simply acknowledge any awkwardness you feel and then proceed anyway. For instance, you might say, “I realize this is a little weird because I’m not your boss, but I’m on the hook for this piece of work, so I’ll be checking in with you about its progress the same way I might if you were on my team?”

How Do I Say It?

Below are some sample lines you can use throughout the work cycle when you’re managing sideways. In all cases, make sure that your tone is both assertive and respectful.

Assigning work:

- “I’m hoping for your help with...”
- “I’m on the hook for getting ____ done by the end of the month...”
- “Could I pull you into...”
- “Given your work with ____, I would love your help with...”

Arranging a check-in on work:

- “We’re trying to be extra careful with this now because we’ve learned in the past that it’s full of land mines, so can we touch base on your draft before it’s final?”
- “I feel awkward asking this, but in the past it’s been hard to communicate exactly what we’re going for with this type of document, so can I look at it before you send it out?”

(Note that here you’re making a point of explaining why you’d like to check in.)

Giving feedback

- “I know figuring out how to deal with X has been tricky. One idea I had was...”
- “I had some thoughts on X – can I share them with you?”

Debriefing

- “I’d like to debrief how ____ went so we can capture lessons while they’re fresh. Does that sound good to you?”
- “I know figuring out ____ ended up being tough. Did you end up with any take-aways for the next time we have to do similar work?”

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