

Leading Up

Influencing Effectively Across Organizational Levels

Intensives Library · Leadership & Decision-Making

CONTENTS

- Part 1 · Overview
- Part 2 · Slides
- Part 3 · Mind Map
- Part 4 · Assessment
- Part 5 · Worksheet

Part 1 · Overview

Leading Up

The most underutilized leadership skill is leading up — the ability to influence, support, and partner effectively with those above you in the organizational hierarchy. When clinical staff develop upward leadership skills, they become more effective advocates for their teams, clients, and clinical priorities, creating better outcomes at every level.

Learning Slides

Upward influence strategies, executive communication, and organizational navigation frameworks.

Mind Map

Visual guide for mapping upward relationships and identifying influence opportunities.

Self-Assessment

Evaluate your current upward leadership competencies and organizational influence.

Worksheet

Practical exercises for developing strategic upward influence and executive communication.

Leading Up Competencies

Understanding organizational priorities

Executive communication and framing

Proactive problem-solving upward

Managing expectations across levels

Advocating for team and client needs

Building credibility with senior leadership

Part 2 · Slides

Leading Up

Managing Inexperienced Supervisors

An advanced professional competency that transforms challenging workplace dynamics into opportunities for mutual growth.

The Challenge

Experienced staff working under supervisors new to leadership or lacking specific addiction expertise. Navigating this requires diplomatic communication and strategic support.

Core Challenges

Identifying the Gaps

Knowledge Gaps

Unfamiliarity with addiction protocols or clinical nuances.

Communication

Unclear expectations or avoidance of difficult conversations.

Role Clarity

Micromanagement or insufficient oversight.

Decision Making

Delays or lack of systematic problem-solving.

Constructive Influence

Strategies for Success

Providing guidance without undermining authority.

- Share resources & research in non-threatening ways
- Offer to brief on complex cases
- Frame suggestions as collaborative problem-solving
- Position yourself as a resource, not a threat

Professional Boundaries

Protecting the Work

Maintaining patient care quality while managing up.

Patient Advocacy Knowing when intervention is required for safety.

Ethical Standards Modeling evidence-based practices regardless of supervision level.

Career Development

Leadership Foundation

Mastering leading up skills prepares you for future leadership roles.

Diplomacy

Navigating hierarchy effectively

Strategy

Systemic thinking & influence

Part 3 · Mind Map

Leading Up

Managing Upwards Strategy

- LeadingUp
- Communication
- Diplomacy
- Influence
- Knowledge
- Sharing
- GapFilling
- Trust
- Reliability
- Support
- Decisions
- Analysis
- Options
- Ethics
- PatientSafety
- Boundaries

Part 4 · Assessment

Leading Up: Managing Inexperienced Supervisors

A Self-Assessment for SUD Treatment Staff

This assessment helps you evaluate and develop your skills in managing upward relationships with inexperienced supervisors. Leading up effectively requires balancing assertiveness with respect, maintaining clear boundaries while building positive relationships, and focusing on organizational success while supporting supervisory growth.

Important: This self-assessment is designed as a tool for professional development and reflection. Answer honestly based on your current experience—there are no "right" answers. This is not a performance evaluation tool.

How to use this assessment: Rate each statement on a scale of 0-4 based on how true it is for you currently. Your responses are automatically saved and you can return to complete the assessment at any time.

Rating Scale

0

Not at all true for me

1

Slightly true for me

2

Moderately true for me

3

Very true for me

4

Extremely true for me

Recognition of Supervisory Dynamics

Score: 0/20Needs Development

This dimension assesses your ability to identify and understand the impact of supervisory inexperience on team functioning, decision-making, and patient care. Strong recognition skills help you navigate complex organizational dynamics effectively.

I can identify when supervisory inexperience affects team functioning.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I notice patterns in my supervisor's decision-making challenges.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I understand how organizational culture influences supervisory relationships.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I recognize the impact of supervision gaps on patient care.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I am aware of boundary issues in the supervisor-supervisee relationship.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

Communication Effectiveness

Score: 0/20Needs Development

This dimension evaluates your ability to communicate concerns, feedback, and ideas to your supervisor in ways that build relationships and solve problems. Effective communication is essential for managing upward relationships successfully.

I express concerns to my supervisor clearly and respectfully.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I frame feedback as collaborative problem-solving opportunities.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I use "I" statements when discussing challenging situations.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I maintain professional composure during difficult conversations.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I actively listen and demonstrate empathy in supervisory interactions.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

Professional Boundaries

Score: 0/20Needs Development

This dimension examines your ability to maintain appropriate professional boundaries while navigating the complexities of supervising inexperienced supervisors. Note: Higher scores in this section may indicate boundary challenges.

Note: This section uses reverse scoring—lower scores indicate better boundary management.

I struggle to maintain appropriate boundaries with my supervisor.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I find it challenging to respect authority while sharing expertise.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I hesitate to speak up about important clinical concerns.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I take on responsibilities outside my role to compensate for supervisory gaps.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I have difficulty separating personal and professional relationships.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

Leadership Initiative

Score: 0/20Needs Development

This dimension assesses your proactive approach to supporting your supervisor, team, and organization while maintaining appropriate role boundaries. Taking leadership initiative demonstrates professional maturity and commitment to organizational success.

I proactively identify opportunities to support my supervisor's growth.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I model best practices in clinical work and team collaboration.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I share knowledge and resources that benefit the team.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I take initiative in problem-solving while respecting authority.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I contribute to creating a positive work environment.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

Escalation Management

Score: 0/20Needs Development

This dimension evaluates your ability to recognize when issues require escalation beyond your supervisor and to handle those situations professionally and effectively. Proper escalation protects patient safety and organizational integrity.

I can identify situations that require escalation beyond my supervisor.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I document concerns objectively and maintain proper records.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I understand appropriate channels for raising serious issues.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I follow organizational protocols for reporting concerns.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I maintain professionalism throughout the escalation process.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

Growth and Development

Score: 0/20Needs Development

This dimension assesses your commitment to continuous professional development and your ability to maintain growth focus even when facing supervisory challenges. A growth orientation helps you navigate difficult situations while building valuable skills.

I seek opportunities for mutual learning with my supervisor.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I maintain focus on professional development despite challenges.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I cultivate relationships with mentors outside my direct supervision.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I contribute to a culture of continuous improvement.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

I balance advocating for change with maintaining positive relationships.

☐ 0 ☐ 1 ☐ 2 ☐ 3 ☐ 4

Reflection Questions

Take time to reflect deeply on your experience managing upward relationships. These questions help you move from assessment to actionable insights.

How do your interactions with supervisors impact team dynamics and patient care?

Consider both positive and negative impacts...

What barriers prevent you from addressing concerns with your supervisor?

Think about internal and external obstacles...

Which strategies have been most effective in building a positive supervisory relationship?

Reflect on what has worked well...

How can you maintain professional boundaries while supporting your supervisor's growth?

Consider the balance between helping and overstepping...

What resources could help you develop stronger upward management skills?

Think about training, mentorship, and other supports...

Action Planning

Based on your reflections and assessment results, identify specific actions to improve your upward management skills.

Action Item 1: What specific skill or behavior will you develop?

Be specific about what you will do...

Action Item 2: What specific skill or behavior will you develop?

Be specific about what you will do...

Action Item 3: What specific skill or behavior will you develop?

Be specific about what you will do...

Implementation Timeline

Immediate (next 24-48 hours):

What will you do in the next 24-48 hours?

Short-term (1 week):

What will you accomplish within one week?

Medium-term (1 month):

What will you achieve within one month?

Save Your Progress

Your responses are automatically saved. Click to download a complete copy of your assessment and action plan.

Remember:

Leading up effectively requires balancing assertiveness with respect, maintaining clear boundaries while building positive relationships, and focusing on organizational success while supporting supervisory growth.

Your role in this dynamic can significantly impact both team functioning and patient care outcomes. Use this assessment as a starting point for ongoing professional development and seek support from mentors and colleagues as you develop these critical leadership skills.

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Embrace, Empower & Evolve

Scoring guide**Advanced Leadership Capacity**

Score: 90 and above

You demonstrate exceptional skills in managing upward relationships and contributing to organizational success while maintaining professional boundaries. Your ability to navigate complex supervisory dynamics positively impacts both team functioning and patient care.

Focus on mentoring others in these skills while continuing to develop your own leadership capabilities.

Developing Leadership Competency

Score: 60 and above

You show solid understanding of upward management principles but may have areas needing strengthening. Pay particular attention to sections scoring below 15/20.

Consider seeking additional mentorship in areas like communication effectiveness or escalation management. Your awareness provides a strong foundation for continued growth.

Emerging Leadership Awareness

Score: 30 and above

You recognize the importance of managing upward relationships but face challenges in consistent implementation. Prioritize developing skills in your lowest-scoring areas, particularly focusing on communication effectiveness and professional boundaries.

Seek guidance from experienced colleagues and consider additional training in leadership development.

Leadership Foundation Building

Score: below the band above

Your scores suggest a need for focused development in managing upward relationships. Work with trusted mentors to create a structured development plan addressing each assessment area.

Consider additional training in professional communication and boundary setting.

Part 5 · Worksheet

Leading Up Strategy Worksheet

Understanding Challenges

List five common challenges associated with inexperienced supervisors:

- a.
- b.
- c.
- d.
- e.

Describe how these challenges impact your work:

Rate current supervisor's experience (1-10) & Explain:

Rating - Explanation

Knowledge & Skills Gaps

List three areas where your supervisor may lack knowledge/skills:

How do these gaps affect clinical practice or team dynamics?

Communication & Boundaries

List three communication issues & impact on morale:

Describe a strategy for addressing role confusion respectfully:

Constructive Feedback & Expertise

Three 'I' statements for providing feedback:

Three non-confrontational phrases for suggestions:

How can you position yourself as a resource without overstepping?

Proactive Strategies

Resources to share (Knowledge Gaps):

Ways to model professional excellence:

Strategies for building trust:

Action Planning

Top three priorities for leading up:

Specific actions to address these priorities:

Final Reflection: Contribution to professional growth:
