Hypercontext

Managing Up Meeting

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As a manager, it's important to be proactive about potential changes at the company, and to equip yourself with all the knowledge you need to make quick decisions. This is a template for those who need to manage up to an executive, communicate effectively, set expectations, and get buy-in.

UPWARD UPDATES (MANAGER TO EXEC)

☐ Update on goals: best case, most likely and worst case scenarios for hitting goals.

Summary:

Next Steps:

_____   _____
_____   _____
_____   _____

☐ Update on the team: team allocation to projects, hiring updates, team morale.

Summary:

Next Steps:

_____   _____
_____   _____
_____   _____

☐ Update on expenses: how much we're spending, costs reduced/added, green/red on budget.

Summary:

Next Steps:

_____   _____
_____   _____
_____   _____

DISCUSSION TOPICS (QUESTIONS FOR EXEC)

☐ Any broader company updates?

Summary:

Next Steps:

_____   _____
_____   _____
_____   _____

☐ Do I need to recalibrate goals/team/expenses based on what you know?

Summary:

Next Steps:

_____   _____
_____   _____
_____   _____

☐ Any messaging I need to share with my team?

Summary:

Next Steps:

_____   _____
_____   _____
_____   _____