

# Leadership in a Cross-Functional Role

## Establishing Credibility and Building Relationships

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The PM roles (Product Manager, Program Manager, and Project Manager) all need to lead cross-functional product efforts without having direct control of resources. A common phrase heard is “I have all the responsibility but no authority”. Last month at the [Seattle ProductCamp](#), brainstormed in a session titled “Responsibility without Authority” to get ideas on how to establish credibility and influence your organization. Here’s a quick discussion of those notes generated from about 25 attendees. It includes identifying the major stakeholders, the roadblocks to influence, and suggestions for gaining credibility and the ability to influence.

### Who Do You Need to Influence?

We started with building a list of who where the groups that primarily Product Managers had to influence in managing their product. We then circled back and added why the influence was needed. Here’s what was said:

Stakeholder	Why Influenced Needed?
Development	<ul style="list-style-type: none"> <li>To prioritize projects &amp; features &amp; the work to be done</li> <li>To get feedback</li> <li>To influence (them) to take ownership for the product</li> </ul>
Executives	<ul style="list-style-type: none"> <li>To get project funding</li> <li>To get air cover (support throughout the org)</li> </ul>
Sales	<ul style="list-style-type: none"> <li>To get them ready them for new products and releases</li> <li>To educate on the customer buying process &amp; use of product</li> <li>To sell what we have (not take orders for new features)</li> <li>To establish confidence in product</li> <li>To educate on the product value prop</li> <li>To establish a relationship point to customers</li> </ul>
Customers	<ul style="list-style-type: none"> <li>To create a conversation with them (about needs, satisfaction, feedback, etc)</li> <li>To create trust across multiple customers for feedback</li> <li>To create awareness of need &amp; validating need exists</li> </ul>
Marketing	<ul style="list-style-type: none"> <li>To use &amp; support my product positioning</li> <li>To support me and be co-champion of the product</li> </ul>
Customer Support	<ul style="list-style-type: none"> <li>To get feedback on product and issues</li> <li>To get them ready them for new products and releases</li> <li>To educate them on context of product (relative to other company offerings) &amp; to manage expectations</li> <li>To enable them to be a Champion for product with customers</li> </ul>
Operations	<ul style="list-style-type: none"> <li>To get them ready them for new products and releases</li> <li>To get alignment w/business objectives</li> </ul>
Finance	<ul style="list-style-type: none"> <li>To create a believable business case</li> <li>To create a partnership in supporting me</li> <li>To enable them to be bilingual in PM speak (customers’ needs, value prop, positioning)</li> </ul>
Partners	<ul style="list-style-type: none"> <li>To get them alignment &amp; ready for new products and releases</li> <li>To manage their expectations</li> </ul>

In summary, there are a large number of internal and external stakeholders involved in the conceptualization, development, deployment, and ongoing operation of a product. A conversation with all of them is needed to gain alignment, support, and effectiveness in delivering to the customers, and in getting feedback from them.

### Roadblocks to Effective Influence

This discussion was intended to identify what gets in the way of establishing influence with stakeholders above. We'll just dive into the list:

<ul style="list-style-type: none"> <li>• <b>Politics</b> <ul style="list-style-type: none"> <li>– Pet projects (prioritized over others)</li> <li>– Pet People (and their ideas)</li> <li>– Org structure not conducive to collaboration</li> <li>– Exec relationships with each other (not so good)</li> <li>– PM sitting apart from stakeholders in different orgs</li> </ul> </li> <li>• <b>PM not an executive seat &amp; functioning across the org</b></li> <li>• <b>No product management process</b> <ul style="list-style-type: none"> <li>– Clear roles &amp; responsibilities and communicated</li> <li>– Misunderstanding of role in the org</li> <li>– Expectations and objectives misaligned with other groups</li> <li>– No consequence of “no cooperation” from participating stakeholders</li> <li>– Lack of cooperation from stakeholders</li> <li>– Don't have any processes</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Silos in the organization</b></li> <li>• <b>Lack of a collaboration culture</b></li> <li>• <b>Data Credibility</b> <ul style="list-style-type: none"> <li>– Data to support your case</li> </ul> </li> <li>• <b>Shared language</b> <ul style="list-style-type: none"> <li>– Misunderstanding of overloaded terms</li> <li>– Talk past each other</li> </ul> </li> <li>• <b>False consensus (I agree to what I understand)</b> <ul style="list-style-type: none"> <li>– Falsely aligned because of misunderstanding each other</li> <li>– Lack of shared expectations</li> </ul> </li> <li>• <b>Poor Strategic Vision</b> <ul style="list-style-type: none"> <li>– Not communicated well</li> <li>– Not measurable &amp; quantifiable</li> <li>– Changing deliverables</li> <li>– Missing Vision -&gt; Strategy -&gt; Tactics steps</li> </ul> </li> <li>• <b>No resources to match vision</b> <ul style="list-style-type: none"> <li>– No funding to accomplish it</li> </ul> </li> </ul>
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This is a lot of stuff to trip over. As a summary, the major roadblock categories fall into these buckets:

- Lack of shared executive vision, expectations, objectives, and commitment across all the organizations
- Lack of clear PM roles and responsibilities communicated across the organization
- A culture of silos, working separately or even against other organizations
- Terminology differences between groups leading to misunderstanding or false commitment
- Lack of supporting customer data for cause

## So How Do You Overcome These?

The following list contains some quick pointers to help overcome these obstacles.

<ul style="list-style-type: none"> <li>• <b>Learn to speak the language of other functions</b> <ul style="list-style-type: none"> <li>– Learn their words and translate</li> <li>– Ask questions to understand</li> <li>– Ask questions to build rapport</li> <li>– Ask questions to clarify and restate</li> <li>– If new, ask “dumb” questions</li> </ul> </li> <li>• <b>Default to customer role</b> <ul style="list-style-type: none"> <li>– Take position of customer</li> <li>– Get data about customers</li> <li>– Use customer proxies to get info (support &amp; sales)</li> </ul> </li> <li>• <b>With Execs</b> <ul style="list-style-type: none"> <li>– Support &amp; help create the strategy</li> <li>– Provide competitive intelligence</li> <li>– Persistent &amp; quiet interactions (directly or thru management)</li> <li>– Create quick wins</li> <li>– Create a solid business case</li> <li>– Create innovative solutions</li> <li>– Find the influential execs and interface to them</li> <li>– Understand what they care about (and how they are compensated)</li> <li>– Your past performance matters</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Create rapport with Sales</b> <ul style="list-style-type: none"> <li>– Meet reps individually</li> <li>– Let them vent &amp; ask what they need</li> <li>– Be their ‘ears’ in customer while with them in meetings and provide note-taking</li> <li>– Do the demo for them</li> </ul> </li> <li>• <b>With Development</b> <ul style="list-style-type: none"> <li>– Minimize randomization of their activities</li> <li>– Help protect them and be a firewall</li> <li>– Be honest about changes and why</li> <li>– Get credible customer info</li> <li>– Inform early as possible to changes</li> <li>– Define requirements as well as possible</li> <li>– Ask for something buildable</li> <li>– Let them solve problems, don’t specify HOW</li> <li>– Get them involved early</li> <li>– Establish common language</li> <li>– Get to the plan as partners</li> <li>– Go to bat for Dev</li> <li>– Your past performance matters</li> </ul> </li> <li>• <b>Communicate broadly and honestly</b></li> </ul>
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The strategy required is a combination of building relationships with peers while also establishing credibility with execs. There are a few key executives in any organization that influence the overall strategy most, and these are the ones to build relationships with, either directly or through their direct reports who have their ear. Missing from the recommendation list is an important establishment and broad communication of the PM role, responsibilities and objectives. Without the path cleared in front of the PM, they are bound to trip.

Another major power center in most product companies is Development, and in this situation you have to win them over by demonstrating you’re a partner and willing to go to bat for them. You also have to prove you are credible source of customer and market info and have alignment with influential execs.

In order to have credible customer info, you need to be talking to them directly or have good contacts with other customer facing orgs, like Sales and Support, who have the info and will share it. Finally, in all interactions across the org, you have to be multilingual translator to align each of the functions and make sure everyone understands and shares the same expectations.

## Summary

The amount of influence you have as a cross-functional leader is less a function of the org chart, and more about building credibility with key execs and peers through personal interactions. Use these relationships to help define the overall product vision and strategy, and then leverage the relationships to manage the development of the tactics within each of the necessary stakeholder groups to implement it. You may not always be completely able or successful in accomplishing this, but most of the time it will take you a long way to achieving your goals.

My thanks to the many participants in the Seattle ProductCamp who attended the session and provided a fun and informative discussion leading to this article.

## About Product Arts

Product Arts specializes in Product Management consulting, deliverables and training. Our consulting consists of product strategy and planning, market performance improvements and processes for creating and delivering products. Our deliverables include specific projects for product requirements, competitive analysis and positioning, project plans, roadmaps, go-to-market planning and materials, pricing and business cases. Our training includes public and private custom training for product management and associated staff. For more information, go to [www.product-arts.com](http://www.product-arts.com) or email [info@product-arts.com](mailto:info@product-arts.com).