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COURSE BROCHURE

Advanced Role Contracting and Managing Upward Training Course

8 – 19 March 2027
Geneva

Advanced Role Contracting and Managing Upward Training Course

Ref: 1056_39799 **Date:** 8 – 19 March 2027 **Location:** Geneva **Fees:** 11000 GBP

Role Contracting and Managing Upward is a 2-week advanced training course for middle and senior managers stepping into broader remits, built around a Role and Reporting Line Charter that each participant drafts for their own position. Flatter structures, matrix reporting and shifting sponsor expectations mean unclear mandates now stall decisions and strain senior relationships. Jupiter Prime Training designed the course around role contracting and managing upward as daily senior disciplines.

Why Role Contracting and Managing Upward Matters Now

Three forces reshape the senior manager's position. Matrix and project structures give one manager several sponsors with competing asks. Executive teams expect upward reporting that is brief, early and candid about risk. Peers in other functions now control resources a manager cannot command. An organisation that contracts roles explicitly gets faster escalation, fewer duplicated mandates and steadier sponsor confidence; one that leaves roles implicit sees silent overload, late surprises and eroded trust. The course draws on the Responsibility Assignment Matrix RACI, situational leadership, stakeholder mapping and 360-degree feedback, applied to the manager's own role.

Who Gains Most from Role Contracting and Managing Upward

- Managers who report to more than one sponsor and must reconcile conflicting expectations
- Functional heads who negotiate mandates and decision rights with executive committees
- Managers newly responsible for a wider portfolio who must renegotiate inherited agreements
- Transformation and change owners who depend on peers for budget and staff
- Deputies and chiefs of staff who translate executive intent into operating commitments

The strongest gains come when a manager attends with peers from the same leadership layer, since their reporting agreements and shared decision rights can be redrawn together.

Role Contracting and Managing Upward Capabilities

Participants leave able to define, negotiate and sustain the agreements that govern a senior role, upward and across.

- Specify the mandate, boundaries and success measures of a senior role — the sponsor agreeing priorities
- Design delegation contracts with explicit decision rights and check-in points — the direct reports taking ownership
- Assess a manager's working style, pressures and preferred reporting format — the upward relationship
- Communicate bad news and escalations early with options attached — the executive weighing risk
- Build reciprocal agreements with peer functions over shared resources — the cross-functional decision
- Weigh competing sponsor demands against agreed role priorities — the portfolio trade-off

Key Role Contracting and Managing Upward Terms

- Role contract — an explicit agreement between a manager and sponsor on mandate, decision rights, resources and success measures for a defined period.
- Managing upward — deliberately shaping the working relationship with one's own manager so priorities, information and support flow both ways.
- Decision rights — the defined authority to recommend, decide, approve or be consulted on a specific class of decisions.
- Delegation contract — a written handover of a task or outcome stating authority level, constraints, reporting points and the conditions for escalation.
- Role ambiguity — the condition where a manager lacks clear information about expectations, boundaries or how performance will be judged.
- Escalation threshold — the agreed trigger, such as risk, cost or delay, at which an issue moves to a higher reporting level.

Role Contracting and Managing Upward Day by Day

Day 1: The Senior Role in Context

- Role Transition Analysis — What Changes When Scope Widens
- Matrix and Dual Reporting Maps — Where Mandates Overlap or Collide
- Role Ambiguity Diagnostic — Locating Unclear Expectations and Boundaries
- Organisational Power Mapping — Who Shapes Decisions Beyond the Chart
- Personal Role Baseline — Current Commitments Versus Stated Mandate

Day 2: Mandates and Decision Rights

- Responsibility Assignment Matrix RACI — Clarifying Accountable and Consulted Parties
- Decision Rights Grid — Recommend, Decide, Approve and Veto Roles
- Mandate Statement Drafting — Purpose, Scope and Exclusions of a Role
- Success Measure Selection — How the Sponsor Will Judge Performance
- Resource and Authority Inventory — Matching Mandate to Available Levers

Day 3: Contracting the Role With Sponsors

- Contracting Conversation Structure — Opening, Exploring and Agreeing Terms
- Sponsor Expectation Interviews — Surfacing Unstated Priorities and Concerns
- Multiple Sponsor Reconciliation — Resolving Conflicting Asks Openly
- Role Renegotiation Triggers — When Circumstances Require a New Contract
- Written Role Agreement — Recording Terms Both Sides Can Revisit

Day 4: Understanding the Manager Above

- Manager Pressure Profile — Goals, Constraints and Reporting Pressures Above
- Working Style Diagnostics — Detail Versus Headline, Written Versus Spoken
- Trust Equation — Credibility, Reliability and Intimacy in Upward Ties
- Expectation Gap Review — Where Perceived and Agreed Priorities Differ
- Upward Relationship Health Check — Signals of Strain or Drift

Day 5: Upward Reporting and Escalation

- Pyramid Principle Briefings — Leading With the Conclusion for Executives
- Escalation Threshold Design — Agreeing When Issues Move Upward
- Bad News Framing — Presenting Problems With Options and Recommendations
- Status Reporting Cadence — Frequency and Format the Sponsor Values
- Pushing Back Constructively — Declining or Reshaping Requests From Above

Day 6: Delegation Contracts Downward

- Situational Leadership Model — Matching Delegation Style to Readiness
- Levels of Delegated Authority — From Investigate to Act Independently
- Delegation Contract Template — Outcome, Constraints, Checkpoints and Escalation
- Reverse Delegation Patterns — Stopping Problems Flowing Back Upward
- Delegation Review Points — Adjusting Authority as Capability Grows

Day 7: Peer Networks and Lateral Agreements

- Stakeholder Mapping Grid — Interest, Influence and Dependency Across Functions
- Reciprocity and Exchange Currencies — What Peers Value in Return
- Service Level Agreements Between Functions — Shared Resource Commitments
- Interface Conflict Resolution — Settling Boundary Disputes Between Peers
- Peer Coalition Building — Aligning Allies Before Executive Decisions

Day 8: Sustaining Agreements Under Pressure

- Role Overload Triage — Saying No Against Agreed Priorities
- Contract Breach Conversations — Addressing Missed Commitments on Either Side
- Political Navigation Tactics — Handling Hidden Agendas Without Collusion
- Sponsor Change Transitions — Recontracting When the Manager Above Changes
- Upward Feedback Techniques — Offering Observations to a Senior Manager

Day 9: Evidence and Self-Assessment

- 360-Degree Feedback Interpretation — Reading Upward, Peer and Team Views
- Role Clarity Survey — Measuring Shared Understanding Within the Unit
- Relationship Ledger — Tracking Commitments Made and Kept
- Case Comparison: Healthcare and Energy Operations — Contracting in Practice
- Personal Contracting Style Profile — Strengths and Habits to Change

Day 10: Practising the Role and Reporting Line Charter

- Mandate and Decision Rights Rehearsal — Applying the Day 2 Grid
- Sponsor Contracting Role Play — Applying the Day 3 Conversation
- Escalation Briefing Simulation — Applying the Day 5 Threshold Design
- Peer Agreement Negotiation — Applying the Day 7 Exchange Currencies
- Role and Reporting Line Charter — Final Draft for Sponsor Sign-Off

Applying Role Contracting and Managing Upward After the Course

- Hold a contracting conversation with the direct sponsor using the agreed mandate statement and decision rights grid, and record the outcome in writing.
- Issue delegation contracts for two open responsibilities, each with authority level, checkpoints and an escalation threshold, and review them after four weeks.

Role Contracting and Managing Upward Questions FAQ

What is role contracting and managing upward, and why does it matter now?

Role contracting and managing upward is the practice of agreeing a senior role's mandate explicitly and shaping the relationship with sponsors deliberately. It matters now because matrix reporting and wider remits leave many managers with unclear authority and competing expectations.

Which roles gain most from role contracting and managing upward?

Managers with several sponsors, functional heads negotiating decision rights and leaders taking on larger portfolios gain most. Deputies and transformation owners who depend on peers for resources also benefit, because their success rests on agreements rather than direct authority.

How does a role contracting and managing upward course differ from a general leadership course?

A role contracting and managing upward course focuses on the agreements around one senior role rather than on leading teams broadly. You work on mandates, sponsor relationships, escalation and peer agreements instead of motivation or team culture.

What do you bring back from role contracting and managing upward training?

You bring back a drafted charter for your own role covering mandate, decision rights, reporting cadence, escalation thresholds and peer agreements. It is ready to discuss with your sponsor in the first weeks after the course.

Role Contracting and Managing Upward: The Way Forward

The Role and Reporting Line Charter first informs the conversation in which a manager and sponsor confirm what the role owns and what it does not. Sponsors, direct reports and peer functions all use it to know where decisions sit. After its first use, the escalation thresholds deserve a second look, since real pressure quickly shows whether they were set at the right level.