

THE EXECUTIVE ROOM

The Executive Playbook

A practical reference for executive judgment, influence and navigation.

PREVIEW

THE COMPLETE EDITION

15 chapters • 176 reference topics • Your field guide for office and beyond

Playbook Chapters

Find a chapter or go directly to any of the 183 situational topics on following pages.

CHAPTER 01 | Inside the Executive Room

CHAPTER 02 | Executive Communication: Say Less, Mean More

CHAPTER 03 | Managing Up: The Boss Relationship

CHAPTER 04 | The Shadow Org Chart

CHAPTER 05 | Reading the Unspoken Organization

CHAPTER 06 | Navigating Reorgs, Mergers and Corporate Change

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CHAPTER 01 | INSIDE THE EXECUTIVE ROOM

1.1 Why excellent performance does not automatically produce a promotion

The difference between rewarding current performance and betting on future scope.

What is really happening

A promotion is a **forecast** of performance at broader scope, not a retrospective award for output. The evidence that earns a high rating may not answer the succession question.

Signals to watch

- Praise focuses on throughput rather than decisions
- Cross-functional assignments go to someone else
- No one describes the next role you could own

The three rules

RULE 1: Separate the tests. Record evidence of present-role delivery and evidence of next-level judgment separately

RULE 2: Ask for the standard. Find out which stretch situations would make a sponsor comfortable recommending you

RULE 3 — MOST IMPORTANT: Make the evidence visible

Lead one consequential cross-team decision before the promotion cycle, with outcomes others can attest to

Same situation, two approaches

INSTEAD OF

“My results should speak for themselves; I delivered more than anyone.”

TRY

“Which two next-level capabilities have I not yet demonstrated, and where should I aim to demonstrate them?”

A script you can adapt

“I am proud of the delivery record. To build a case for broader responsibility, which decisions do you need to see me own?”

EXECUTIVE PARTNERS' TAKE

Outstanding execution creates eligibility; demonstrated range and trusted judgment create a credible promotion case.

CHAPTER 03 | MANAGING UP: THE BOSS RELATIONSHIP

3.3 How to stay calm under your boss's pressure

Separate urgency from panic and maintain decision quality.

What is really happening

A boss's urgent tone can narrow attention and provoke defensiveness. Composure means identifying what actually has to be decided before inheriting the panic.

Signals to watch

- You agree to deadlines under pressure before assessing capacity
- A sharp question derails your train of thought
- The team mirrors the leader's anxiety

The three rules

RULE 1: Pause for the issue. Restate the actual constraint in neutral language

RULE 2: Separate response from reaction. Check facts before promising recovery

RULE 3 — MOST IMPORTANT: Offer one next move

Give the boss a concrete decision or checkpoint

Same situation, two approaches

INSTEAD OF

"I know it is bad; we will fix everything immediately somehow."

TRY

"The constraint is capacity, not effort. We can redirect two people today or defer the noncritical release."

A script you can adapt

"I hear the urgency. Let's clarify what is at risk and what we can still control."

EXECUTIVE PARTNERS' TAKE

Steadiness is most valuable when someone with more authority has lost theirs.

CHAPTER 06 | NAVIGATING REORGS, MERGERS AND CORPORATE CHANGE

6.9 How to survive a leadership change above you

Understand the new leader's mandate before selling your old narrative.

What is really happening

A new leader may view the function through a different strategic lens. Explaining everything through the predecessor's priorities can make a valuable person appear misaligned.

Signals to watch

- The new leader asks different questions
- Old success measures lose prominence
- Access shifts toward people solving new problems

The three rules

RULE 1: Discover the mandate. Learn what the new leader is accountable to deliver

RULE 2: Translate your contribution. Connect capabilities to the new priorities

RULE 3 — MOST IMPORTANT: Create early evidence

Deliver one useful result aligned with new priorities without defending every inherited choice

Same situation, two approaches

INSTEAD OF

"The prior leader loved this approach, so we should keep it."

TRY

"Here is how our capabilities can support your three near-term priorities."

A script you can adapt

"What would a successful first quarter look like from your perspective, and where is our work most relevant?"

EXECUTIVE PARTNERS' TAKE

A leadership transition rewards the ability to translate existing value into a new strategy.

CHAPTER 08 | CAREER NARRATIVE, REPUTATION AND DIFFERENTIATION

8.3 What do people say about you when you leave the room?

Your reputation is the compressed version of your career.

What is really happening

Your reputation is the shorthand others use when you are not present. A promotion or important assignment can turn on whether that shorthand signals trust under pressure.

Signals to watch

- Peers describe you as an expert and hard worker but not a decision-maker
- Feedback themes differ from your self-image
- Leaders repeatedly call you for the same type of problem

The three rules

RULE 1: Seek candid evidence. Ask trusted colleagues what they would say about your strengths and limits

RULE 2: Compare intent with actual impact. Identify patterns of how your behavior lands

RULE 3 — MOST IMPORTANT: Change through action

Give people consistent evidence of counterexamples to retire an outdated label

Same situation, two approaches

INSTEAD OF

“People will know what I am capable of when I receive a bigger title.”

TRY

“I want to be known for managing sound tradeoffs, so I will deliberately take visible ownership of difficult choices.”

A script you can adapt

“When I am not in the room, what would you say I am most trusted to handle?”

EXECUTIVE PARTNERS' TAKE

Reputation is shaped by repeated evidence, including what you do when nobody is watching.

CHAPTER 09 | FROM SPECIALIST TO ENTERPRISE LEADER

9.2 When expertise becomes a leadership constraint

The temptation to personally solve everything.

What is really happening

Deep expertise becomes constraining when everyone waits for the expert to decide on details. Scale requires transferring knowledge and delegating judgment.

Signals to watch

- The same leader reviews all complex work
- Projects pause during vacations
- People ask for an answer instead of proposing options

The three rules

RULE 1: Spot the bottleneck. Shortlist decisions only you can currently make

RULE 2: Transfer principles. Teach how to evaluate risk, not just which answer to choose

RULE 3 — MOST IMPORTANT: Delegate meaningful authority

Let others own decisions with agreed escalation limits

Same situation, two approaches

INSTEAD OF

"It is faster when I personally solve every difficult issue."

TRY

"Managers in my team will handle cases within set thresholds, and I will focus on cross-business strategy."

A script you can adapt

"What approach would you recommend, and under what circumstances would you escalate the decision?"

EXECUTIVE PARTNERS' TAKE

Expertise creates more value when it improves other people's decisions.

CHAPTER 10 | CORPORATE POLITICS WITHOUT BECOMING POLITICAL

10.9 How to give someone a way to agree with you

Preserve dignity to reduce unnecessary resistance.

What is really happening

People resist proposals that make agreement feel like public defeat. A face-saving route can unlock a valid compromise without falsifying the record.

Signals to watch

- A stakeholder still defends an outdated position after new data
- Arguments become increasingly absolute
- Private conversations bring more flexibility than public ones

The three rules

RULE 1: Find the legitimate concern. Identify what their position protects and the threat

RULE 2: Offer a revised path. Integrate agreed nuances without erasing the original intent

RULE 3 — MOST IMPORTANT: Share credit positively

Let agreement come across as collaborative improvement

Same situation, two approaches

INSTEAD OF

"I will prove that your previous position was wrong."

TRY

"Your concern about service continuity improves the proposal; our teams should connect to incorporate that as safeguard."

A script you can adapt

"The revised plan preserves the outcome you were keen on as addressed in our updated proposal."

EXECUTIVE PARTNERS' TAKE

Winning agreement matters more than winning the argument.

CHAPTER 15 | EXECUTIVE WEALTH: FROM COMPENSATION TO DURABLE WEALTH

15.9 From accumulation to retirement income

Why the portfolio that built wealth may not be the same structure that supports predictable retirement spending.

What is really happening

Accumulation and retirement income solve different problems. A portfolio that maximized long-term growth may need a different withdrawal, liquidity and risk structure when paychecks stop.

Signals to watch

- Retirement spending has no multi-year withdrawal plan
- Near-term expenses depend on volatile on-demand asset sales
- The plan assumes isolated tax rates or that average returns arrive smoothly

The three rules

RULE 1: Define the spending need. Separate fixed obligations, essential expenses from flexible goals

RULE 2: Work with experts to build a withdrawal framework. Coordinate reserves, account access and portfolio risk

RULE 3 — MOST IMPORTANT: Model adverse sequences

Test early market losses, large healthcare expenses and other severe scenarios with professionals

Same situation, two approaches

INSTEAD OF

“My investments have grown for years, so retirement withdrawals will be simple.”

TRY

“I will match near-term spending to accessible reserves and review sustainable withdrawals with age- and income-based meaningful sequence.”

A script you can adapt

“How would we fund the first several years if our concentrated market positions declined just after retirement?”

EXECUTIVE PARTNERS' TAKE

Structure retirement income while choices exist, not after the first difficult event forces them.