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Since companies became more cross-functional and collaborative and swapped top-down management for dotted line reporting with fuzzy accountability, the work has become more complicated. All day every day, most of us are fielding requests. The questions are formal and informal, large and small. They are not only from direct bosses and teammates, but also from internal customers all over the organization chart. Add to this the demands of external stakeholders, from family, friends and acquaintances, and sometimes even from complete strangers. The requests keep coming in, via tables and via zoom screens, by phone, email and instant message. The influx is daunting. And now more than ever, your professional success and personal well-being depend on how you manage it. You don't say yes to anything and everyone and do everything right. If you take too much of the wrong things, you waste time, energy and money and distract yourself from what's really important. Yet no one wants to upset or disappoint colleagues or other contacts, or, worse, reject important career and life chances. So you have to learn when and how to say both no and yes. A considered no protects you. With the right yes, you can help others, make a difference, work together successfully and increase your influence. You want to gain a reputation for saying no at the right times for the right reasons and make every yes really count. How do you do that? Through decades of research into what makes people the most valued, indispensable employees at hundreds of organizations, I have discovered a framework that I believe works. It consists of three parts: rate the question, deliver a well-reasoned no and give a yes that you set up for success. Assess the question When making a financial investment, most of us do some due diligence—looking for more information so we can make a good judgment. When you say yes or no to a request, you decide where you want to invest your personal resources, so give the same careful consideration. That starts with insisting on a well-defined question. Sometimes the question is sloppy, so you misunderstand: It sounds like more or less than it is, or it sends you off in the wrong direction. That's why you should help yourself and the asker by getting critical details about the request. You develop a reputation for being very responsive if you engage in this way. That doesn't mean you agree with the question. It simply indicates that you take the needs of your colleagues seriously, whether you help or not. You need to ask questions and take notes, clarifying every aspect of the request, including the costs and benefits. Think of the intake memos written by lawyers, accountants and doctors – documents created for their own reference to record the data of each client's needs. Essentially, you help the refine the request for a proposal. The memo should address the following questions: What is today's date and time? Today? will help you keep track of how the project is evolving.) Who's the asker? What is the demand for the delivered? Be specific. By when should it be achieved? What resources are needed? Who is the source of authority at this point, and do you have the approval of that person or group? What are the potential benefits? What are the obvious and hidden costs? The bigger or more complicated the question, the more information you need to gather. Sometimes honoring the request is out of the question. Or a question seems so insignificant that an intake memo would seem unnecessary or take longer to draw up than just completing the request. Indeed, if you tried to zoom into every microask, people could accuse you of creating ridiculous bureaucracy. And they'd have a point. But the vast majority of requests will deserve at least some further research before you appeal to them. You will notice that small questions can balloon in large or that what at first sounds impossible turns out to be much easier than you assumed. You might see that a seemingly stupid question is actually smart, or vice versa. That's why the intake memo should be a rock-solid habit for everything except the most minor and urgent requests. Make sure you share your list with the asker to confirm that you are on the same page. Imagine the trust that your colleagues will gain in your promises when they see you making a mutually agreed account of what they need and how much easier they will accept your yes or no verdict. Zane (whose name has been changed to protect confidentiality) is an extremely capable business analyst in a large consumer electronics company. Until recently, he had a hard time saying no at work, especially to his boss and other senior leaders, because he was so determined to prove his worth. Overwhelmed by requests, he often found himself terribly overcommitted, working harder and harder, juggling competing priorities as quickly as he could. He never intended to promise too much, but he was often doubling back to renegotiating delivery dates, even as he accepted new requests. Soon he started dropping balls, making mistakes and annoying colleagues. Any incoming request felt like an attack to repel, so at least for a while, no seemed to be the only answer. Finally, Zane's manager, Aiko, intervened and asked that all requests for his time go through her. Although he temporarily lost his power to say yes or no, he learned a lot from his boss's process, and eventually Zane took over himself. We had an intake form, Zane explains. Who does and authorises this request? Are these data we have or data we need to get or start capturing the future? Do you need analysis, and is that something we Do? And what is the company's purpose? Even after answering these questions, prioritizing competing requests can often be tricky. In one case, Zane's boss tasked him with setting up a new data-capture system as quickly as possible, just as he was was together a report for Aiko. The latter was a two-day project. Construction of the new system would take about two weeks. Should he immediately focus on the biggest big shot or first the quick victory? Another challenge for Zane was ranking competing requests from his colleagues against those of his two direct reports and from people elsewhere in the organization and beyond. But using the disciplined intake-memo process, Zane got better and better at comparing how urgent or important each project really was, making smart decisions, and demonstrating everyone's true service mentality without overextending themselves. A well-reasoned no, delivered at the right time, can be a huge blessing, to save time and effort for everyone on the road. A bad no, hastily decided, causes problems for everyone, especially you. Bad nos happen when you haven't properly rated the question; when you let decisions be driven by personal prejudice, including dislike of the asker or dismissals of people who don't seem important enough; or when you refuse simply because you have said yes to too many other things and have not left ability. Bad nos often lead to missing meaningful experiences and are also more likely to be overruled, causing hard feelings on both sides. A good no is all about timing and logic. You must say no to things that are not allowed, cannot be done, or that should not be done on balance. I call these the no gates, a concept I borrowed from a project management technique called stage-gate reviews, which divide initiatives into different stages and then submit to a go, no go decision. Maria Corte The first gate is the easiest to understand. If there are procedures, guidelines or regulations that prohibit you from doing anything, or someone has already made it clear that this category of work is forbidden to you, at least for now—then just give you a straight no. (If you think it's against the rules for everyone, you also consider talking the applicant out of pursuing the idea.) What do you say? I have no discretion here. This request is contrary to the policy/rules/law. So you don't have to fix it at all. Perhaps I can help you reset your request within the rules so that it can then be considered. Turning people off at the second gate is also easy (at least sometimes). If the request isn't feasible, you say, I just can't do it. If you just don't have the ability to make it happen, you say, Sorry, that's beyond my skill set. I'm not even close. What if you don't currently have the experience and skills to handle the request quickly and confidently, but you could acquire them? The answer may still be no. But the answer could also be: This is not my That said, if you accept that I need extra time to climb a learning curve, I'll do a little bit about it. It could be a development opportunity for you and eventually give the applicant a new go-to person (you) on this kind of The most common reason I can't, however, is overcommitment. In those cases, people tend to say things like With all the other priorities I'm balancing, I don't have the availability to do it anytime soon. That's a forced no. If you don't avoid it, try to retain the ability to fulfill the request later or else help on the road when you're available. What's the best way to respond? I am already committed to other responsibilities and projects. I'd like to do this for you at a later date. If that's not possible, I'd like to be of service in the future. The third part is the trickiest, because whether something deserves to do is not always obvious at first. You need to judge the chances of success, the potential return on the investment and the priorities of you and your organisation. And sometimes the answer to the request may or may not be yet. What do you say in those cases? I need to know more. Let me ask you the following questions.... Essentially, you get the person who needs help to make a more thorough or convincing proposal. What if you understand the question and you don't think it's a valuable goal for you right now? You could say: That is not something I have to say yes to at the moment, because the chances of success are small, ... the necessary resources are too large, ... it is not in line with current priorities, or ... the likely outcome is [otherwise somehow not desirable]. When it comes to timing, the most important thing is to go thorough with the request. Then answer quickly. Don't give a hasty no, or you risk appearing dismissive. But don't put on your counterpart either. If you mean no really not at the moment, but soon, then let the person know that. If the answer is No, but I know someone who can or No, but I can provide you with help that someone else will help do, then say that as soon as possible. If the answer is I can't, can't or shouldn't do it, and it's a bad idea, so you shouldn't do it either, have that conversation before the asker presses you or anyone else further. Once Zane routinely began tuning in to every question and doing his due diligence, he found it much easier to see when he should refuse a request and became much more confident delivering a well-substantiated no or one yet. For example, around the time he balanced that report for Aiko with setting up the new system for her boss, Zane had to refuse or delay filling out some other requests. As usual, he gave a lot of standard that data is just not in system responses. But he also said no to a request for a wild goose pursuit of a peer of his boss who had a history of wasting his time. I wasn't building a correlation model again the pattern he was looking for, Zane explains, pointing out that he also gave Aiko a heads-up to make sure no one would be surprised. He also proposed the completion of a request from another executive of Aiko's, say something along the lines of We have never collected that particular data before. Maybe we can start, but I wouldn't be free to work on that for a few weeks. Through Zane's increasingly thorough, business-like approach, his colleagues came to deeply appreciate his reviews and comments and, over time, his judgment. An effective yes each good no makes room for a better yes— one that adds value, builds relationships, and improves your reputation. What's a better yes? It is tailored to the mission, values, priorities, basic rules and marching orders from above. It is for something that you do, ideally good, fast and with confidence. In other words, it's about one of your specialties - or a chance to build a new one. It allows you to make an investment of time, energy and resources in something that has a high probability of success and offers significant potential benefits. The key to a big yes is clear communication and a targeted plan for implementation. First, explain exactly why you say yes: You enrich the project, you want to work together, you see the benefits. Then pin down your plan of action, especially for a deliverable of each scope. Make sure you agree on the details, including what the applicant needs from you, what you will do together, how and when the work will be done, who has oversight, and when to discuss the issue next. If this is a multistep process, you may need to make some of those calls as you move forward. As his reputation for professionalism and good judgment grew, Zane was in greater demand, but also had more and more discretion to choose between competing responsibilities and projects. As the company moved to a more advanced approach to business intelligence (data collection, analysis, reporting, and forecasting), his input was sought by a number of executives with whom he had worked, and his opinion gained a lot of weight. As a result, Zane was named principal analyst in the new implementation of the enterprise resource management system, which he describes as the greatest professional development experience of his career. CONCLUSION Most people have too much to do and too little time. Saying yes to requests from bosses, teammates and others can make you feel important, but can be a recipe for burnout. The only way to be sustainably successful is to get really good at saying no in a way that makes people feel respected and to only say yes if your reasoning is right and you have a clear attack plan. Attack.

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