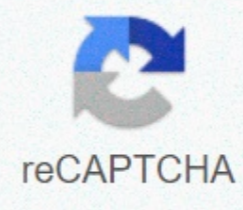




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Maria Corte Since the companies began working more cross-functionally and collaboratively, exchanging top-down guidance for dotted reporting with vague accountability, the work has complicated. Every day, most of us field requests. The issues are formal and informal, large and small. They are not only from straight bosses and teammates, but also from internal clients throughout the organizing chart. Add to this the demands of external stakeholders, family, friends and acquaintances, and sometimes even complete strangers. Queries continue to arrive through tables and through zoom screens, over the phone, email, and instant messaging. The tide is challenging. And now more than ever, your professional success and personal well-being depend on how you manage it. You can't say so to everyone and everything and do it all well. When you take on too much or the wrong things, you spend time, energy and money and distract yourself from what really matters. Still, no one wants to anger or disappoint colleagues or other contacts - or, worse, turn off key career and life opportunities. So you have to find out when and how to say no, and yes. It is believed that neither protects you. The right thing is to serve others, make a difference, successfully cooperate and increase their influence. You want to gain a reputation for being told no at the right time for the right reasons and make everyone really count. How do you do that? Through decades of research into what makes people the most highly valued, irreplaceable employees in hundreds of organizations, I've revealed the framework that I think work. It has three parts: evaluate the query, deliver a well-reasoned no, and give so that sets you up for success. Rate Ask when making financial investments, most of us do some due diligence— looking for more information so we can make a circoidment judgment. When you say yes or no to a request, you decide where to invest your personal resources, so give the choice just as carefully consider. This begins with an insistence on a clearly defined issue. Sometimes the request is scoundrate, so you misunderstand. It sounds like more or less than that, or it sends you in the wrong direction. That's why you should help yourself and the asker by getting critical details about the inquiry. You can develop a reputation for being very responsive if you participate in this way. This does not mean that you agree to the request. It just signals that you are serious to your colleagues taking the needs of your colleagues, whether you can help or not. You should ask questions and take notes clarifying every aspect of the request, including costs and benefits. Think about accepting memos written by lawyers, accountants and doctors— documents created for their own link to capture the specifics of each client's needs. Essentially help the asker fine-tune the request for the offer. The memo should cover the following questions: What is today's date and time? (This will help you keep track of how the project develops.) Who is this anchor? What does the end result require? Be specific. When does this need to be achieved? What resources will be needed? Who is the source of authority on this issue, and do you have that endorsement of a person or group? What are the possible benefits? What are the obvious and hidden costs? The more or harder you ask, the more information you have to gather. Sometimes there is no question of honoring the inquiry. Either the request looks so insignificant that taking the memo seems unnecessary- or will take longer to work out than simply executing the request. Indeed, if you've tried to drill into every micro-isk, people can accuse you of creating a ridiculous bureaucracy. And they'd have a point. But the vast majority of inquiries will deserve at least some further investigation before you call them off. You'll find that little asks can balloon into large ones or that what initially sounds impossible turns out to be much easier than you assumed. You can see that seemingly stupid ask is actually reasonable, or vice versa. That is why the reception of the monument should become a strong habit for everything but the most favorable and urgent requests. Make sure you share your list with the anchor to confirm that you're on the same page. Imagine the confidence your colleagues will get in your promises if they see you create a mutually approved record of what they need and how much more easily they will make your decision yes or no. Zane (whose name has been changed to protect privacy) is an extremely capable business analyst at a major consumer electronics company. Until recently, he struggled to say no at work, especially to his boss and other senior management, because he was so determined to prove his worth. According to inquiries, he often found himself terribly outnumbered, working harder and harder, juggling competing priorities as quickly as he could. He never intended to scare, but he often doubles down to review delivery dates even as he has accepted new requests. He soon began dropping balls, making mistakes and annoying colleagues. Every incoming request felt like an attack to fend off, so at least for a while, didn't seem like the only answer. Finally, Zayn's manager, Aiko, intervened and asked that all requests for his time go through her. Although he temporarily lost power to say yes or no, he learned a lot from his boss's process, and eventually, Zayn took it over. We had a form of reception,' Zayn explains. Who makes and authorizes this request? Do we have this data or are the data we need to get or start capturing going forward? You need analysis and that's what we Make? And what is the business goal? Even after answering these questions, prioritizing competing requests can often be tricky. In one case, boss Zayn's boss didze him to create a new data capture system as soon as possible, just as he dragged together a report for Aiko. The latter was a two-day project. Building a new system will take about two weeks. Should he immediately focus on the biggest big shot or first get a quick win? Another challenge for Zayn was ranking competing requests from his peers against those of his two direct reports and from people elsewhere in the organization and beyond. But using a disciplined admissions-memory process, Zayn got better and better at comparing how relevant or important each project really was, making smart decisions and showing everyone his true mindset of service without overindulging himself. A well-reasoned neither thoughtful no, delivered at the right time, can be a huge boon, saving time and trouble for everyone down the road. Bad no, hastily solved, causes problems in everyone, especially for you. Bad does not occur when you have not properly evaluated the request; when you allow decisions to be made through personal biases, including dislike of the austerity or dismissal of people who do not seem important enough; or when you refuse simply because you said so many other things and do not have any opportunities left. Bad nos often cause you to miss meaningful experiences and are also more likely to be reversed, leaving hard feelings on both sides. Good no it's all about timing and logic. You have to say no to things that are not allowed, can not be done, or that, on balance, should not be done. I call these without gates, a concept I borrowed from a project management technique called stage-gate reviews that divide initiatives into different phases and then subordinate everyone to go, no go decisions. Maria Corte The first gate is easiest to understand. If there are procedures, guidelines or rules that prohibit you from doing something - or someone has already made it clear that this category of work is out of bounds for you, at least for now- then you're just giving a straight no. What do you say? I don't have discretion here. This request violates the policy/rules/law. So you really shouldn't do it at all. Perhaps I can help you paraphrase your request within the rules so that it can then be considered. Turning people down near the second gate is also simple (at least occasionally). If the request is unfulfilled, you say: I just can't do it. If you just don't have the ability to deliver on it, then you say: Sorry, it's beyond my skill set. I'm not even close. What to do if you don't have the experience and skills to process the request quickly and confidently—but can you purchase them? The answer could still be no. But the answer may also be this is not my speciality. However, if you recognize that I need extra time to climb the learning curve, then I'll take a crack at it. This can be a development opportunity for you and, ultimately, give the requestor a new person (you) on such a project. The most common reason I can't, however, is overreacting. In these cases people tend to say things like With all the other priorities I balance, I don't have the ability to do it anytime soon. It's a forced No. If you can't avoid it, try saving the ability to run the request later, otherwise help down the road when you're available. What is the best way to respond? I am already committed to other responsibilities and projects. I'd love to do it for you later. If this is not possible, I would love to be on duty somehow in the future. The third gate is the most difficult, because whether something merit to do is not always clear at first glance. You have to make a decision about the likelihood of your success, about the potential return on investment, and in line with the priorities of yours and your organization. And sometimes the answer to the request may be either not yet. What do you say in these cases? I need to know more. Let me ask you the following questions... Essentially, you get someone who needs help to make a more thorough or convincing offer. What if you understand the request and you don't think it's a worthy goal for you right now? You can say: This is not something I have to say so at this time, because the likelihood of success is low, ... the necessary resources are too large, ... this is not consistent with current priorities, or ... likely outcome [otherwise somehow not desirable] When it comes to timing, the most important thing is to carefully engage with the request. Then quickly answer. Don't let there be no rainfall, or you risk surrendering. But don't string your colleague together. If your no really means not at the moment, but soon, then let the person know that. If the answer is no, but I know someone who can or can't, but I can provide you with help that will help someone else do it, then say that as soon as possible. If the answer is : I can't, can't or shouldn't do it, and that's a bad idea, so you shouldn't do it either, have that conversation before the asker puts pressure on you or someone else coming up. Once Zayn regularly began to tune in to every request and do his due diligence, it was much easier for him to see when he should reject the request and became much more confident in delivering a grated ---abo Still. For example, around the time he balances this report for Aiko with creating a new system for his boss, Zayn had to give up or delay filling out several other requests. As always, it gave many standard answers What data is simply not in the system. But he also said no to a request for a chase for a wild goose from his boss's peer, who had a history of wasting his time. I wasn't building a correlation model again so I couldn't find the pattern he was looking for once again,' Zayn explains, noting that he also gave Aiko a heads up to make sure no one would be surprised. He also delayed completing a request from another Aiko executive peer by saying something along the lines we had never collected this specific data before. Maybe we can start, but I wouldn't be free to work on it for a few weeks. Because of Zayn's increasingly thorough, businesslike approach, his colleagues deeply appreciate his assessments and responses and over time—his judgment. Effective Yes Every good no makes room for a better yes – one that adds value, builds relationships, and enhances your reputation. What's better than that? This is consistent with mission, values, priorities, ground rules and marching orders from above. This is for something you can do, ideally good, fast, and with confidence. In other words, it involves one of your specialties- or the ability to build a new one. This allows you to make investments of time, energy and resources into something that has a high probability of success and offers significant potential benefits. The key to the great is clear communication and a purposeful execution plan. First, explain why you say this: You can enrich the project, you want to collaborate, you see the benefits. Then pin your playbook, especially for the final results of any area. Make sure you agree with the details, including what the inquirer needs from you, what you will do together, how and when the work will be done, who has oversight, and when you will discuss the matter further. If this is a multi-wave process, you may have to have a few of these conversations when you go along. As his reputation for professionalism and common sense grew, Zayn was in demand but also had more and more discretion to choose among competing responsibilities and projects. As the company moved to a more sophisticated approach to business intelligence (data collection, analysis, reporting and modeling for forecasting), its contribution was sought by a number of executives from which it worked, and his opinion was given great weight. As a result, Zayn acted as a leading analyst on the introduction of a new 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. Yes, 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 a really good say no in a way that makes people feel respected and talked about so only when your reasoning is sound and you have a clear plan to attack. A version of this article appeared in the September-October 2020 issue of The Harvard Business Review. Review.