

Practice pages: *chapters 1 to 9*

One worksheet per chapter of *Before You Say Yes*, then the answer keys. Work each case by hand: who knows what, your two questions, the plan check, and a replay where one thing changes.

Every case here is fictional. Alex, the Client, Tomas, Morgan, Dana, Jo and every role named on these pages are fictional, and so are their workplaces. Otto is a fictional AI. The hours and times belong to the practice cases, not to any real work, and the keys are the answers the cases support, not advice about any real project.

Start with the Chapter 1 worksheet

How to use it

1. Read the chapter, then fill in its worksheet without looking at the key.
2. On the plan check, circle one verdict per plan: fits, needs someone's decision, gap or breaks. "Gap" means the plan as written falls short of what it needs (time, hours or a missing fact) and could work if that shortfall were closed. "Breaks" means it does something the case doesn't allow. Each worksheet repeats this above its plan table.
3. Check your page against the key. The keys are at the back so a group can hand out the worksheets alone.

Worksheets

1. [Chapter 1: The Friday Deadline](#)
2. [Chapter 2: The Two-Hour Addition](#)
3. [Chapter 3: The Name on the Report](#)
4. [Chapter 4: The Access Matrix](#)
5. [Chapter 5: The Eight-File Handoff](#)
6. [Chapter 6: The One-Page Brief](#)
7. [Chapter 7: It Says It's Done](#)
8. [Chapter 8: The Bot Said Friday](#)
9. [Chapter 9: The Tidied Brief](#)

Answer keys

1. [Chapter 1: The Friday Deadline](#)
2. [Chapter 2: The Two-Hour Addition](#)
3. [Chapter 3: The Name on the Report](#)
4. [Chapter 4: The Access Matrix](#)
5. [Chapter 5: The Eight-File Handoff](#)
6. [Chapter 6: The One-Page Brief](#)
7. [Chapter 7: It Says It's Done](#)
8. [Chapter 8: The Bot Said Friday](#)
9. [Chapter 9: The Tidied Brief](#)

Draft compiled 2026-09-30 from the chapter worksheets. Not a final product; no price or offer attached. Every case is fictional; Otto is a fictional AI.

Worksheet, Chapter 1: The Friday Deadline

Fictional practice case. Alex, the Client and the workplace are fictional. The hours are practice estimates, not promises about real work.

Name: _____ Date: _____

1. The situation

1. On a video call, the Client asks: "Can you get all of it done by Friday noon?" Friday noon is fixed.
2. "All of it" is three parts: the core, the handoff and the polish. The demo needs the core and the handoff; the polish is optional.
3. You don't know how long each part takes, or how much time is actually free before Friday noon.

2. Who knows what

Fill in each cell. Write "?" where you don't know yet.

Who	What they know	What they don't know	What only they can decide
You			
Alex (delivery lead)			
The Client			

The easy word to catch (write it down, and what it would promise): _____

3. Your two questions

Look at your half in section 2. Each question fills a fact you are missing, and goes to the person who holds it. Write in each answer as you get it from the chapter or your facilitator.

Question 1

To: _____

I'll ask: _____

Why only they can answer: _____

Their answer: _____

Question 2

To: _____

I'll ask: _____

Why only they can answer: _____

Their answer: _____

4. The plan check

Fill in the lines. Some blanks need the answers to your two questions.

- Time actually free before Friday noon: _____ hours. Extra hours approved: _____
- Full version: core _____ + handoff _____ + polish _____ = _____ hours, which is _____ hours short
- Essential parts: core _____ + handoff _____ = _____ hours, with _____ hour(s) to spare
- Does the spare time buy the polish as estimated? yes / no, because _____

Now test each plan. Circle a verdict, then write why in one line. "Gap" means the plan as written falls short of what it needs (time, hours or a missing fact) and could work if that shortfall were closed. "Breaks" means it does something the case doesn't allow.

Plan	Verdict	Why
All three parts by Friday noon	fits / needs someone's decision / gap / breaks	
Core and handoff by Friday noon; polish decided separately	fits / needs someone's decision / gap / breaks	
Core only by Friday noon	fits / needs someone's decision / gap / breaks	
Everything next week	fits / needs someone's decision / gap / breaks	

Who decides when the polish happens: _____

The one fact the Client is missing, which you'll share in your reply: _____

Your reply to the Client in two or three lines:

5. Replay: one thing changes

Two extra hours are explicitly approved and actually free before Friday noon. Everything else stays the same.

- Time available now: _____ + _____ = _____ hours
- Does the full version fit now? yes / no, because _____
- Who still chooses between the full version and the essential one? _____
- What should you write down about the two extra hours? _____
- Why do both conditions (approved and free) matter? _____

Fictional practice case. Every person and workplace is fictional; Otto is a fictional AI. Draft for review, not a final product.

Worksheet, Chapter 2: The Two-Hour Addition

Fictional practice case. Tomas, Morgan, Otto and the workplace are fictional. Otto is a fictional AI. The hours are practice estimates, not promises about real work.

Name: _____ Date: _____

1. The situation

1. You lead delivery. Five hours remain, already allocated: data section 2 hours, recommendations section 2 hours, handoff 1 hour.
2. Tomas, a stakeholder, asks you to add a comparison page. "It should be quick." You estimate it at 2 hours.
3. You don't know why he wants it, when it's needed, or who can approve a change to the agreed scope.

2. Who knows what

Fill in each cell. Write "?" where you don't know yet.

Who	What they know	What they don't know	What only they can decide
You			
Tomas (the requester)			
The scope owner			

The thing you can't assume (write it down): _____

3. Your two questions

Before the questions, the one fact the other side is missing:

Fact I'll share: _____

Question 1

To: _____

I'll ask: _____

Why only they can answer: _____

Question 2

To: _____

I'll ask: _____

Why only they can answer: _____

4. The plan check

Fill in the lines.

- Agreed package: data _____ + recommendations _____ + handoff _____ = _____ hours, against _____ hours remaining
- Agreed package + comparison: _____ + _____ = _____ hours, which is _____ hours short
- Swap: data _____ + comparison _____ + handoff _____ = _____ hours. What goes missing? _____
- Drop the handoff: _____ + _____ + _____ = _____ hours. Does it fit? yes / no

Now test each plan. Circle a verdict, then write why in one line. "Gap" means the plan as written falls short of what it needs (time, hours or a missing fact) and could work if that shortfall were closed. "Breaks" means it does something the case doesn't allow.

Plan	Verdict	Why
Add the comparison and keep everything	fits / needs someone's decision / gap / breaks	
Swap the recommendations section for the comparison	fits / needs someone's decision / gap / breaks	
Drop the handoff to make room	fits / needs someone's decision / gap / breaks	
Keep the agreed five-hour package; defer the comparison and confirm with the scope owner	fits / needs someone's decision / gap / breaks	

Who decides: _____ Your note to that person in two or three lines:

5. Replay: one thing changes

The comparison didn't come from a person. Otto, the client's AI writing assistant, tidied the brief and added a vendor comparison page. Everything else stays the same.

- Does the arithmetic change? _____
- What does change? _____
- Your two questions to Otto:

1. _____
2. _____

- Which plan fits now, and whom do you ask? _____

Worksheet, Chapter 3: The Name on the Report

Fictional practice case. Alex, Jo, Dana, the report owner, Otto and the workplace are fictional. Otto is a fictional AI.

Name: _____ Date: _____

1. The situation

1. A shared report lists one author. You remember that Alex prepared the analysis and Jo validated the data.
2. You believe the credit is wrong, but you haven't checked the contribution record.
3. You don't know who can edit the report, or who has already seen it.

2. Who knows what

Fill in each cell. Write "?" where you don't know yet.

Who	What they know	What they don't know	What only they can decide
You			
Dana (team lead, keeps the project record)			
The report owner			

What nobody here holds yet (write it down): _____

3. Your two questions

No hours to share this time. Keep what you know apart from what you believe:

I know: _____

I believe: _____

Question 1

To: _____

I'll ask: _____

Why only they can answer: _____

Question 2

To: _____

I'll ask: _____

Why only they can answer: _____

4. The check

Line up the three versions.

- The shared report says: _____
- Your belief was: _____
- The contribution record says: _____
- The correction should follow: _____

Now test each plan. Circle a verdict, then write why in one line. "Gap" means the plan as written falls short of what it needs (time, hours or a missing fact) and could work if that shortfall were closed. "Breaks" means it does something the case doesn't allow.

Plan	Verdict	Why
Fix your own copy	fits / needs someone's decision / gap / breaks	
Post in the group that someone took the credit	fits / needs someone's decision / gap / breaks	
Wait and mention it at the next review	fits / needs someone's decision / gap / breaks	
Ask the report owner to correct the shared source, using the recorded contributions, then check who saw the old version	fits / needs someone's decision / gap / breaks	

Who can change the shared report: _____

Your request to that person in two or three lines:

5. Replay: one thing changes

The report was compiled by Otto, the team's AI writing assistant. Otto's note: "Report compiled. Author: one name, taken from the file." Everything else stays the same.

- Your questions to Otto:

1. _____

2. _____

- What does Otto tell you, and what doesn't it tell you? _____
- The step that now comes first: _____
- What you still don't know: _____

Fictional practice case. Every person and workplace is fictional; Otto is a fictional AI. Draft for review, not a final product.

Worksheet, Chapter 4: The Access Matrix

Fictional practice case. The vendor, the subject-matter owner and the workplace are fictional. The times belong to the case, not to any real access process.

Name: _____ Date: _____

1. The situation

1. At 16:00 you hand a vendor a 12-row access matrix. They will use it to set up access.
2. Two rows are unverified. The subject-matter owner can verify them at 16:30.
3. You have 45 focused minutes, 15:00 to 15:45. The file looks finished.

2. Who knows what

Fill in each cell. Write "?" where you don't know yet.

Who	What they know	What they don't know	What only they can decide
You			
The subject-matter owner			
The vendor			

What only *looks* true (keep it apart from what you know): _____

3. Your two questions

Before the questions, the one fact the other side is missing:

Fact I'll share: _____

Question 1

To: _____

I'll ask: _____

Why only they can answer: _____

Question 2

To: _____

I'll ask: _____

Why only they can answer: _____

4. The plan check

Fill in the lines.

- Rows: _____ look verified + _____ unverified = _____ rows

- The rows that look verified still need: _____
- Your window: _____ to _____, which is _____ minutes
- The handoff at _____ is _____ minutes after your window ends
- The owner can verify at _____, which is _____ minutes before / after the handoff (circle one)

Now test each plan. Circle a verdict, then write why in one line. "Gap" means the plan as written falls short of what it needs (time, hours or a missing fact) and could work if that shortfall were closed. "Breaks" means it does something the case doesn't allow.

Plan	Verdict	Why
Send all twelve rows as "the current matrix"	fits / needs someone's decision / gap / breaks	
Mark the two open rows verified yourself, or ask a colleague the owner didn't name	fits / needs someone's decision / gap / breaks	
Send ten checked rows with the two open rows clearly marked, and questions attached	fits / needs someone's decision / gap / breaks	
Move the final handoff until after the owner's check	fits / needs someone's decision / gap / breaks	
Ask the owner to name a delegate	fits / needs someone's decision / gap / breaks	

Who decides: _____ The line that tells the vendor what not to do yet:

5. Replay: one thing changes

The vendor asks for a final file at 16:00. Everything else stays the same.

- What changed, and what did not? _____
- Does the file become final? Why or why not? _____
- Your question now goes to: _____
- Write it in one or two lines:

Worksheet, Chapter 5: The Eight-File Handoff

Fictional practice case. The Client, the receiver, the QA reviewer and the workplace are fictional. The times belong to the case, not to any real project.

Name: _____ Date: _____

1. The situation

1. At 10:00 you hand off an eight-file package. Six files are final; two still need a quality check.
2. You have 35 focused minutes, 09:00 to 09:35, to package the handoff.
3. You don't know who can run the check or when, or how much time the receiver has.

2. Who knows what

Fill in each cell. Write "?" where you don't know yet.

Who	What they know	What they don't know	What only they can decide
You			
The Client			
The receiver			

The easy assumption to catch (write it down): _____

3. Your two questions

Before the questions, the one fact the other side is missing:

Fact I'll share: _____

Question 1

To: _____

I'll ask: _____

Why only they can answer: _____

Question 2

To: _____

I'll ask: _____

Why only they can answer: _____

4. The plan check

Fill in the lines. Some blanks need the answers to your two questions.

- Files: _____ final + _____ pending = _____ files

- Your window: _____ to _____, which is _____ minutes, used for _____
- The quality check takes _____ minutes, is run by _____, free _____
- The receiver's overlap with you: _____ to _____, which is _____ minutes; next window _____
- Can the check happen before the _____ handoff? yes / no, because _____

Now test each plan. Circle a verdict, then write why in one line. "Gap" means the plan as written falls short of what it needs (time, hours or a missing fact) and could work if that shortfall were closed. "Breaks" means it does something the case doesn't allow.

Plan	Verdict	Why
Run the check yourself in your 35 minutes, then hand off all eight at 10:00	fits / needs someone's decision / gap / breaks	
Hand off the six final files at 10:00 with a manifest marking the two pending; ask the Client to confirm the check and follow-up	fits / needs someone's decision / gap / breaks	
Move the whole handoff to later, when the check and the receiver are both available	fits / needs someone's decision / gap / breaks	
Hand off all eight at 10:00 and ask the receiver to stay late for the last two	fits / needs someone's decision / gap / breaks	

Who decides: _____ Your manifest in three lines:

Final: _____

Pending: _____

Final acceptance of the pending files: _____

5. Replay: one thing changes

The receiver's after-14:00 window is no longer available. Everything else stays the same.

- Which part of your plan still works? _____
- What is missing now? _____
- Your question now goes to: _____
- Write it in one or two lines:

Worksheet, Chapter 6: The One-Page Brief

Fictional practice case. The partner, the reviewer, the owner of the deadline and the workplace are fictional. The times belong to the case, not to any real project.

Name: _____ Date: _____

1. The situation

1. At 13:00 a partner asks for a revised one-page brief by 16:00. Your rewrite takes about 60 minutes.
2. You have a 45-minute focus block, 13:15 to 14:00, and your second role starts at 14:30.
3. A reviewer has a short handoff at 14:00. You don't know how long their review takes or what they have to work from.

2. Who knows what

Fill in each cell. Write "?" where you don't know yet.

Who	What they know	What they don't know	What only they can decide
You			
The reviewer			
The owner of the 16:00 deadline			

The easy assumption to catch (write it down): _____

3. Your two questions

Before the questions, the one fact the other side is missing:

Fact I'll share: _____

Question 1

To: _____

I'll ask: _____

Why only they can answer: _____

Question 2

To: _____

I'll ask: _____

Why only they can answer: _____

4. The plan check

Fill in the lines. Some blanks need the answers to your two questions.

- Work: rewrite _____ minutes + factual review _____ minutes = _____ minutes
- Rewrite _____ minutes vs your block _____ to _____ (_____ minutes): short by _____ minutes
- Review _____ minutes vs the reviewer's handoff _____ to _____ (_____ minutes): short by _____ minutes
- Your second role starts at _____. Is the time after that free for this brief? yes / no
- What the handoff can carry instead of a full review: _____

Now test each plan. Circle a verdict, then write why in one line. "Gap" means the plan as written falls short of what it needs (time, hours or a missing fact) and could work if that shortfall were closed. "Breaks" means it does something the case doesn't allow.

Plan	Verdict	Why
Rewrite the full brief in the 13:15 to 14:00 block and have it reviewed in the 14:00 handoff	fits / needs someone's decision / gap / breaks	
Finish the rewrite after 14:30, alongside your second role	fits / needs someone's decision / gap / breaks	
By 14:00, send the reviewer a scoped draft of the top section, the latest brief and your review questions; ask the owner of 16:00 to confirm that scope or a later time	fits / needs someone's decision / gap / breaks	
Promise the complete, reviewed brief by 16:00 and review it yourself later	fits / needs someone's decision / gap / breaks	

Who decides the scope and the time: _____

The fact you still don't have, even for the plan that fits: _____

5. Replay: one thing changes

The partner requires the complete one-page brief by 16:00. Everything else stays the same.

- Does the scoped draft still meet the request? _____
- What would the complete brief by 16:00 now need? _____
- Your question now goes to: _____
- Write it in one or two lines:

Worksheet, Chapter 7: It Says It's Done

Fictional practice case. Dana, Otto and the workplace are fictional. Otto is a fictional AI. The times belong to the case, not to any real project.

Name: _____ Date: _____

1. The situation

1. At 13:30 Otto, an AI research assistant, reports: "All 20 sources summarized."
2. Your memo goes to Dana at 14:30. Dana reviews it before the client sees anything.
3. The memo's argument rests on 8 of the 20 sources. Checking one summary against its source takes you 5 minutes.
4. You don't know how Otto read each source, or what Dana will accept as a citation. No one else is available to check sources before 14:30.

2. Who knows what

Fill in each cell. Write "?" where you don't know yet.

Who	What they know	What they don't know	What only they can decide
You			
Otto			
Dana			

The easy assumption to catch (write it down): _____

3. Your two questions

Before the questions, the one fact you hold that the others don't:

Fact I hold: _____

Question 1

To: _____

I'll ask: _____

Why only they can answer: _____

Question 2

To: _____

I'll ask: _____

Why only they can answer: _____

A question that sounds careful but adds nothing (write one): _____

4. The plan check

Fill in the lines. Some blanks need the answers to your two questions.

- Check every source: _____ sources x _____ minutes = _____ minutes, against _____ minutes available: short by _____ minutes
- Check only the sources the memo relies on: _____ x _____ = _____ minutes
- Label the rest as unchecked: _____ minutes. Buffer: _____ minutes. Total: _____ + _____ + _____ = _____ minutes
- Sources the memo doesn't rely on: _____. Of those, read from abstracts only: _____

Now test each plan. Circle a verdict, then write why in one line. "Gap" means the plan as written falls short of what it needs (time, hours or a missing fact) and could work if that shortfall were closed. "Breaks" means it does something the case doesn't allow.

Plan	Verdict	Why
Send the memo at 14:30 as done: the assistant summarized all 20	fits / needs someone's decision / gap / breaks	
Check all 20 summaries against their sources, then send	fits / needs someone's decision / gap / breaks	
Ask someone else to check the other 12 sources	fits / needs someone's decision / gap / breaks	
Check the sources the memo relies on, label the rest (including any abstract-only), and ask Dana to decide what can be cited	fits / needs someone's decision / gap / breaks	

What the handoff to Dana lists (three counts): _____

Who decides what may be cited: _____

The one thing still open, even for the plan that fits: _____

5. Replay: one thing changes

Dana says: "Cite only sources you personally checked." Everything else stays the same.

- Does the plan still fit? _____
- What changes in the memo? _____
- What do you tell Dana before 14:30? _____
- Write it in one or two lines:

Worksheet, Chapter 8: The Bot Said Friday

Fictional practice case. Priya, the client owner, the vendor and the chat agent are fictional. The chat agent is a fictional AI. The days belong to the case, not to any real project.

Name: _____ Date: _____

1. The situation

1. Your client's launch needs parts delivered on Friday.
2. The vendor's chat agent has just told you: "Friday delivery is fine."
3. You haven't checked the order itself, or who at the vendor can change it.
4. What the chat agent said isn't recorded against the order. Priya, the vendor's account manager, is reachable today.

2. Who knows what

Fill in each cell. Write "?" where you don't know yet.

Who	What they know	What they don't know	What only they can decide or do
You			
Chat agent			
Priya			
Client owner			

The easy assumption to catch (write it down): _____

3. Your two questions

Before the questions, the one fact you hold that the others don't:

Fact I hold: _____

Question 1

To: _____

I'll ask: _____

Why only they can answer: _____

Question 2

To: _____

I'll ask: _____

Why only they can answer: _____

A question that sounds careful but adds nothing (write one): _____

After the two questions, the check you still owe (who do you ask, and what?):

4. The plan check

Fill in the lines. Some blanks need the answers to your questions.

- Launch needs the parts on: _____. The order record shows: _____.
- Days after the launch date until the record changes: _____ days (count them: _____)
- Who can change the order: _____
- Who decides whether to hold the launch: _____

Now test each plan. Circle a verdict, then write why in one line. "Gap" means the plan as written falls short of what it needs (time, hours or a missing fact) and could work if that shortfall were closed. "Breaks" means it does something the case doesn't allow.

Plan	Verdict	Why
Tell the client Friday is confirmed and keep the chat transcript as proof	fits / needs someone's decision / gap / breaks	
Rebook with another vendor now, without asking the client owner	fits / needs someone's decision / gap / breaks	
Say nothing and see what arrives on Friday	fits / needs someone's decision / gap / breaks	
Treat "Friday is fine" as unconfirmed: ask Priya for the date on the order record, and tell the client owner Friday isn't confirmed yet	fits / needs someone's decision / gap / breaks	

The one thing still to check, even for the plan that fits: _____

5. Replay: one thing changes

The order record updates to Friday. Everything else stays the same.

- What closes the gap? _____
- What do you cite as proof, and what don't you cite? _____
- What do you confirm, and what do you tell the client owner? _____
- Write it in one or two lines:

Worksheet, Chapter 9: The Tidied Brief

Fictional practice case. The client owner and the client are fictional. The client's AI writing assistant is a fictional AI. The hours belong to the case, not to any real project.

Name: _____ Date: _____

1. The situation

1. Your agreed plan uses 5 hours of the 5 you have: data section 2h, recommendations section 2h, handoff 1h.
2. The client sends a "tidied" brief, drafted with the client's AI writing assistant (fictional AI). It adds a vendor comparison page, about 2h by your estimate, that wasn't in the agreed plan.
3. You don't know whether the client meant to add it, or who can confirm the change.
4. The agreed plan was confirmed before the rewrite.

2. Who knows what

Fill in each cell. Write "?" where you don't know yet.

Who	What they know	What they don't know	What only they can decide or do
You			
The client's AI writing assistant (fictional AI)			
Client owner			

The easy word to catch (write it down): _____

3. Your two questions

Before the questions, the one fact you hold that the others don't:

Fact I hold: _____

Question 1

To: _____

I'll ask: _____

Why only they can answer: _____

Question 2

To: _____

I'll ask: _____

Why only they can answer: _____

A question that sounds careful but adds nothing (write one): _____

After the two questions, the check you still owe (who do you ask, and what will they need from you first?):

4. The plan check

Fill in the lines. Some blanks need the answers to your questions.

- Agreed plan: ____ + ____ + ____ = ____ h of ____ h
- With the comparison page: ____ + ____ + ____ + ____ = ____ h against ____ h
- How many hours short: _____
- Who can confirm a change to the scope: _____
- Draw the diff: which line is on one side only, and what does it cost?

Now test each plan. Circle a verdict, then write why in one line. "Gap" means the plan as written falls short of what it needs (time, hours or a missing fact) and could work if that shortfall were closed. "Breaks" means it does something the case doesn't allow.

Plan	Verdict	Why
Quietly build the new brief as sent	fits / needs someone's decision / gap / breaks	
Deliver the agreed plan and ignore the new brief without saying so	fits / needs someone's decision / gap / breaks	
Swap the recommendations section for the comparison page	fits / needs someone's decision / gap / breaks	
Reply to the client owner comparing the new brief with the agreed plan, and ask them to confirm the comparison page (and its 2h) or remove it	fits / needs someone's decision / gap / breaks	

The one thing still to check, even for the plan that fits: _____

5. Replay: one thing changes

The client owner says the addition was unintended: the agreed 5h plan stands. Everything else stays the same.

- What settled it, and who? _____
 - Which plan from the table above now breaks because there is nothing to swap in?
- _____
- What do you write down, and why in writing? _____
 - Write it in one or two lines:

Answer key, Chapter 1 worksheet: The Friday Deadline

Fictional practice case (C01). Alex, the Client and the workplace are fictional. These are the answers the case supports, not advice about any real project.

2. Who knows what

Who	What they know	What they don't know	What only they can decide
You	Friday noon is fixed. The demo needs the core and the handoff; the polish is optional. You are the person the Client asked.	How long each part takes; how much time is actually free	Nothing about the demo. Your job is to ask Alex, then share the size of the job with the Client.
Alex (delivery lead)	How much time is actually free before Friday noon (5 hours), that nothing extra has been approved, and how long each part takes (core 3, handoff 1, polish 3)	Whether the polish can be accepted after the demo, and when	Nothing about scope; Alex holds the hours, the estimates and their calendar
The Client	The date, and that the demo needs the core and the handoff	That the full version is 7 hours of work, until you say so	The demo, its date and its scope, including when the polish happens

The easy word: "Sure." It would promise to fit 7 hours of work into a window nobody has measured.

3. Your two questions

- **Question 1, to Alex:** "How many hours do you have before Friday noon?" Answer: "Five hours. Nothing extra has been approved." Only Alex holds the hours; a guess from the Client is not a measurement.
- **Question 2, to Alex:** "How long does each part take?" Answer: "Core 3h, handoff 1h, polish 3h." Only Alex delivers the work, and these are current estimates, not guarantees. You already know which parts the demo needs (it is your half), so that is not a question for the Client.

Fact to share (with the Client, in your reply): the full version is about seven hours of work, and five hours are free.

4. The plan check

- Time actually free before Friday noon: 5 hours. Extra hours approved: none.
- Full version: $3 + 1 + 3 = 7$ hours, which is 2 hours short
- Essential parts: $3 + 1 = 4$ hours, with 1 hour to spare
- The spare hour does not buy the polish: the polish is estimated at 3 hours. A smaller improvement would need its own estimate and its own offer.

Plan	Verdict	Why
All three parts by Friday noon	gap	$3 + 1 + 3 = 7$ hours against 5. It only works if two extra hours are approved and actually free, and neither is true.
Core and handoff by Friday noon; polish decided separately	fits	$3 + 1 = 4$ hours of 5. Friday noon is met, and the Client decides when the polish happens.
Core only by Friday noon	breaks	The demo needs the handoff too. Cutting it isn't your decision.

Plan	Verdict	Why
Everything next week	breaks	Friday noon is fixed. Only the owner of the demo could authorize a new date.

Who decides: the Client (the owner of the Friday demo).

Reply (the chapter's version): "Yes to core and handoff by Friday noon. That's four of the five free hours. The full version with polish is seven hours, so it doesn't fit as things stand. Can we decide on the polish separately?"

After the call: tell Alex the plan. A later slot for the polish is a proposal until the Client confirms it.

5. Replay: two extra hours are explicitly approved and actually free

- Time available now: $5 + 2 = 7$ hours
- The full version fits: $3 + 1 + 3 = 7$ hours of work meets 7 hours of time.
- The essential version still fits (4 hours of 7). The Client still chooses between the two.
- Write down who approved the two extra hours. If anyone asks how seven hours fit, the answer is a name and a decision.
- Both conditions matter: permission alone isn't capacity (the calendar may have no room), and free time alone isn't permission (unapproved hours are still borrowed). The two questions stay the same.

Fictional practice case. Every person and workplace is fictional; Otto is a fictional AI. Draft for review, not a final product.

Answer key, Chapter 2 worksheet: The Two-Hour Addition

Fictional practice case (C02). Tomas, Morgan, Otto and the workplace are fictional. Otto is a fictional AI. These are the answers the case supports, not advice about any real project.

2. Who knows what

Who	What they know	What they don't know	What only they can decide
You	Five hours remain, all allocated: data 2, recommendations 2, handoff 1. The comparison is your estimate, 2 hours.	Why Tomas wants it, what it must show, when it's needed; who can approve a scope change	Nothing about scope. Your job is to show the plan and ask.
Tomas (the requester)	What the comparison is for (two vendors side by side, for next month's planning) and who owns the scope (Morgan)	That the five hours are already allocated, until you say so	Nothing about scope: "I'm asking, not approving."
The scope owner (Morgan)	The agreed scope	That the request exists, until someone tells them	Changing the agreed scope: swapping, deferring, or approving new time

The thing you can't assume: that Tomas knows the five hours are already spoken for. "It should be quick" is about the new page, not about what it would push out.

3. Your two questions

Fact to share: "The five hours we have left are already allocated: data two, recommendations two, handoff one."

- **Question 1, to Tomas:** "What does the comparison need to show, and by when?" Answer: "Two vendors side by side. It's for next month's planning, not needed in this delivery." Only the person asking knows what it's for.
- **Question 2, to Tomas:** "Who can approve changing the agreed scope?" Answer: "Morgan owns the scope. I'm asking, not approving." Tomas can't approve, but he knows who can.

Both go to Tomas because he holds both answers. "Is it a small job?"; "Can you give me more time?" and "Could someone else build it?" return nothing useful.

4. The plan check

- Agreed package: $2 + 2 + 1 = 5$ hours, against 5 hours remaining (fits exactly)
- Agreed package + comparison: $5 + 2 = 7$ hours, which is 2 hours short
- Swap: $2 + 2 + 1 = 5$ hours. The recommendations section goes missing.
- Drop the handoff: $2 + 2 + 2 = 6$ hours. It doesn't fit, and the receiver loses the transfer.

Plan	Verdict	Why
Add the comparison and keep everything	gap	$4 + 1 + 2 = 7$ hours against 5. It needs two extra hours that are approved and available.
Swap the recommendations section for the comparison	needs the scope owner's decision	$2 + 2 + 1 = 5$ hours, so it fits on paper, but only Morgan can approve removing agreed work.

Plan	Verdict	Why
Drop the handoff to make room	breaks	Still 6 hours in 5, and the receiver loses the transfer.
Keep the agreed five-hour package; defer the comparison and confirm with the scope owner	fits	$2 + 2 + 1 = 5$ hours of 5. The comparison isn't needed in this delivery; Morgan confirms when, or whether, it's scheduled.

Who decides: Morgan, the scope owner.

Note to Morgan (one version, from the chapter): "Tomas has asked for a two-vendor comparison page, about two hours, for next month's planning. The five remaining hours are fully allocated: data 2, recommendations 2, handoff 1. Two options: (1) keep this package and schedule the comparison with its own budget for next month; or (2) name the two hours of agreed scope that move. Could you decide by [date]?"

5. Replay: Otto added the comparison

- The arithmetic doesn't change: 5 of 5 for the package, 7 against 5 with the comparison, the swap still $2 + 2 + 1 = 5$, dropping the handoff still 6 in 5.
- What changes is the source: you don't yet know that any person asked for the page.
- The two useful questions to Otto:
- "Did the client ask for the comparison, or did you add it?" Otto: "I added it while tidying. The client's notes mention vendors once."
- "Has anyone confirmed this version of the brief?" Otto: "No one yet. I drafted it."
- The plan that fits is the same one, for a different reason: keep the agreed five-hour package, don't build the comparison, and ask Morgan whether it's wanted at all. The swap still needs a decision, and first someone has to confirm that the tidied brief is the brief.

Fictional practice case. Every person and workplace is fictional; Otto is a fictional AI. Draft for review, not a final product.

Answer key, Chapter 3 worksheet: The Name on the Report

Fictional practice case (C03). Alex, Jo, Dana, the report owner, Otto and the workplace are fictional. Otto is a fictional AI. These are the answers the case supports, not advice about any real report or workplace process.

2. Who knows what

Who	What they know	What they don't know	What only they can decide
You	The shared report lists one author.	What the contribution record says; who can edit the report; who has seen it	Nothing about the report. Your job is to check and ask the right person.
Dana (team lead, keeps the project record)	What the record says: Alex prepared the analysis, Jo validated the data, shared attribution was agreed. Who can edit the report, and that it has gone to the wider team.	Why the report lists one name ("I don't know, and the record doesn't say.")	Nothing about the author line; she keeps the record
The report owner	The shared report and who it was shared with	What the record says, until someone cites it	The shared report: what goes on the author line, and whether a correction note is needed

What nobody here holds: why the report lists one name. The report shows an error, not a motive.

3. Your two questions

I know: the shared report lists one author. I believe: Alex and Jo both worked on it.

- **Question 1, to Dana:** "What does the contribution record say?" Answer: "Alex prepared the analysis, Jo validated the data, and shared attribution was agreed." Dana keeps the record; your memory is a starting point, not evidence.
- **Question 2, to Dana:** "Who can edit the shared report, and has it gone out?" Answer: "Only the report owner can edit it. It has already been shared with the wider team."

Both go to Dana because she holds both answers. "Why did they do it?", "Should we take this straight to HR?" and "Is this a big deal?" return nothing the record can answer.

4. The check

- The shared report says: one author.
- Your belief was: Alex and Jo both worked on it.
- The contribution record says: Alex prepared the analysis; Jo validated the data; shared attribution was agreed.
- The correction follows the record, roles included.

Plan	Verdict	Why
Fix your own copy	breaks	Your copy improves; the shared record doesn't.
Post in the group that someone took the credit	breaks	The record shows an error, not a motive.

Plan	Verdict	Why
Wait and mention it at the next review	gap	Meanwhile the wrong version keeps circulating. Ask for the correction now.
Ask the report owner to correct the shared source, using the recorded contributions, then check who saw the old version	fits	It matches the record (Alex: analysis, Jo: validation) and repairs the version other people use.

Who can change the shared report: the report owner.

Request (one version, from the chapter): "The shared report lists one author. The contribution record, which Dana keeps, says Alex prepared the analysis and Jo validated the data, and that shared attribution was agreed. Could you update the author line? One option: 'Analysis: Alex. Validation: Jo.' Since the report has gone to the wider team, could we also check whether the earlier version needs a correction note?"

5. Replay: Otto compiled the report

- Useful questions to Otto:
- "Where did the author name come from?" Otto: "From the document-owner field of the final file, which lists one person. That field doesn't record who did the work."
- "Is there a contribution record I can open?" Otto: "The project tracker has a contributions entry for this report. I haven't compared it with the report; you'd need to open it."

(Also useful: "Can you change the author line in the shared report?" Otto: "I can draft corrected wording. Publishing the change needs the report owner.")

- Otto tells you where the wrong name came from and where the evidence is. It does not tell you what the evidence says; "Alex and Jo" is still your belief.
- Plans: asking the report owner to change the author line to Alex and Jo is a gap, because you haven't read the record. Opening the contribution record first, then asking the report owner to correct the shared source, fits. Fixing your own copy and posting that someone took the credit still break.
- Still unknown: whether the report has already gone out, and to whom. The report owner can tell you.

Fictional practice case. Every person and workplace is fictional; Otto is a fictional AI. Draft for review, not a final product.

Answer key, Chapter 4 worksheet: The Access Matrix

Fictional practice case (C04). These are the answers the case supports, not advice about any real access process.

2. Who knows what

Who	What they know	What they don't know	What only they can decide
You	Handoff at 16:00. 12 rows. 2 unverified. The owner can verify at 16:30. Your window is 15:00 to 15:45.	Whether 16:00 is a draft review or the final transfer; whether the vendor can take a labeled partial draft; whether anyone else may verify. The case assumes the vendor will not treat a labeled draft as final without confirmation, but you haven't checked that.	Nothing about access. Your job is to prepare the matrix and the questions.
The subject-matter owner	Whether the two open rows are right (can verify at 16:30)	What the vendor plans to do at 16:00	Approving access; naming a delegate; moving the final handoff
The vendor	Whether 16:00 is a draft review or the final transfer; whether they can receive a labeled partial draft	That two of the twelve rows are unverified	What they will do with the file they receive

What only looks true: "The other 10 rows are verified" (they still need a source timestamp check) and "the current copy is approved" (current is not approved). Also: the owner is reachable at 16:30, but being reachable is not delegated authority.

3. Your two questions

Fact to share: two of the twelve rows are unverified, and the owner can verify them at 16:30.

- **Question 1, to the vendor:** "Is 16:00 a draft review or the final transfer?" (and: "Can you receive a clearly labeled partial draft?"). Only the vendor knows what they will do with the file.
- **Question 2, to the subject-matter owner:** "If you can't verify before 16:00, will you name a delegate who can?" Only the owner can authorize someone else to verify.

4. The plan check

- Rows: 10 look verified + 2 unverified = 12 rows
- The 10 still need a check against their source timestamps.
- Your window: 15:00 to 15:45, 45 minutes
- The handoff at 16:00 is 15 minutes after your window ends.
- The owner can verify at 16:30, 30 minutes after the handoff.

Plan	Verdict	Why
Send all twelve rows as "the current matrix"	breaks	Two unverified rows go out looking verified; an unlabeled matrix can create an incorrect access handoff.
Mark the two open rows verified yourself, or ask a colleague the owner didn't name	breaks	It invents a verification or a substitute nobody authorized.

Plan	Verdict	Why
Send ten checked rows with the two open rows clearly marked, and questions attached	fits, if the vendor can receive a labeled partial draft	The meeting goes ahead and two items stay open, visibly.
Move the final handoff until after the owner's check	needs the owner's decision	Protects accuracy but creates new coordination work.
Ask the owner to name a delegate	needs the owner's decision	The owner decides who, and whether.

Who decides: the subject-matter owner (access, a delegate, moving the handoff).

What not to do yet: "Please don't grant access for the 2 open rows from this draft."

5. Replay: the vendor asks for a final file at 16:00

- The request changed; the rows did not. Still 12 rows, 10 checked, 2 open, owner at 16:30.
- The file does not become final: final means verified, and verifying the two rows is not yours to do. Keep it labeled DRAFT, not final. The case assumes the vendor won't treat it as final without confirmation (an assumption to check), and nobody is in a position to confirm it yet.
- Tell the vendor plainly: "The 2 open rows stay open until the owner checks them at 16:30."
- The question goes to the owner: "The vendor needs a final at 16:00. 2 rows are still open. Is 16:00 a draft review, or will you name someone to verify sooner?"
- Then stop. The owner's answer is not yours to write. A request for a final file is not the same thing as a final file.

Fictional practice case. Every person and workplace is fictional; Otto is a fictional AI. Draft for review, not a final product.

Answer key, Chapter 5 worksheet: The Eight-File Handoff

Fictional practice case (C05). These are the answers the case supports, not advice about any real project.

2. Who knows what

Who	What they know	What they don't know	What only they can decide
You	Handoff at 10:00. 8 files: 6 final, 2 need a quality check. Your window is 09:00 to 09:35.	Who can run the check, and when; when the receiver can take the files; whether a partial transfer is accepted	How to package the six files and write the manifest
The Client	Only their QA reviewer can run the 30-minute check, free only after 14:00; the receiver's overlap (09:45 to 10:00) and next window (after 14:00)	Whether the two pending files depend on the six final ones (nobody has checked)	Who runs the check; accepting a partial transfer; moving the handoff; naming a different receiver
The receiver	What they will do with the files	Which two files are pending, unless the manifest says so	Their own day (nobody else extends it)

The easy assumption: "Thirty minutes fits inside thirty-five, so the check is mine." The size of a task says nothing about whose task it is.

3. Your two questions

Fact to share (one version; the chapter leaves it to you): two of the eight files still need a quality check, and your 35 minutes are for packaging.

- **Question 1, to the Client:** "Who can check the two pending files, and when?" Answer: only their QA reviewer, about 30 minutes, free only after 14:00.
- **Question 2, to the Client:** "When can the receiver actually take the files?" Answer: a 15-minute overlap, 09:45 to 10:00, and next work after 14:00.

Both go to the Client because the Client holds both answers.

4. The plan check

- Files: 6 final + 2 pending = 8 files
- Your window: 09:00 to 09:35, 35 minutes, used for packaging and the manifest
- The quality check takes 30 minutes, is run by the Client's QA reviewer, free only after 14:00
- The receiver's overlap: 09:45 to 10:00, 15 minutes; next window after 14:00
- The check cannot happen before the 10:00 handoff, because the only person who can run it is free only after 14:00.

Plan	Verdict	Why
Run the check yourself in your 35 minutes, then hand off all eight at 10:00	breaks	Only the Client's QA reviewer can do that check; changing the QA owner needs the Client's authorization.

Plan	Verdict	Why
Hand off the six final files at 10:00 with a manifest marking the two pending; ask the Client to confirm the check and follow-up	fits	Six files move inside the 09:45 to 10:00 overlap, two labeled pending; the check waits for the QA reviewer after 14:00, and the after-14:00 follow-up stays a proposal until the Client confirms it.
Move the whole handoff to later, when the check and the receiver are both available	needs the Client's decision	It moves the agreed 10:00 handoff and leaves six usable files untransferred.
Hand off all eight at 10:00 and ask the receiver to stay late for the last two	breaks	You can't extend the receiver's day, and the two files still need the QA reviewer after 14:00.

Who decides: the Client.

Manifest: Final (6): ready to use. Pending (2): not for use yet; they need the Client's QA check, about 30 minutes, after 14:00. Final acceptance of the 2 pending files: proposed for after 14:00, waiting for the Client to confirm.

5. Replay: the receiver's after-14:00 window is no longer available

- Still works: the six final files move at 10:00 with the manifest, and the two pending files still get their check after 14:00.
- Missing: someone to receive the two files after their check. The six-file plan now needs the Client's decision, and moving the whole handoff to after 14:00 breaks (no receiver).
- The question goes to the Client: "The two pending files get their check after 14:00, but nobody is set to receive them. Who can accept those two, and when?"
- Then stop. Don't accept the files on the receiver's behalf, and don't ask the receiver to extend their day. A handoff is finished when someone has accepted the last file.

Fictional practice case. Every person and workplace is fictional; Otto is a fictional AI. Draft for review, not a final product.

Answer key, Chapter 6 worksheet: The One-Page Brief

Fictional practice case (C06). These are the answers the case supports, not advice about any real project.

2. Who knows what

Who	What they know	What they don't know	What only they can decide
You	Request at 13:00 for 16:00. Rewrite about 60 minutes. Focus block 13:15 to 14:00. Reviewer handoff at 14:00. Second role from 14:30.	How long the review takes; what the reviewer has to work from; which section matters most	What goes into your 45-minute draft
The reviewer	The factual review takes about 30 minutes; their handoff is 20 minutes, 14:00 to 14:20; they don't have the latest brief	Whether 16:00 can move ("That isn't my call")	Whether a page passes their factual review
The owner of the 16:00 deadline	What the brief must do by 16:00; whether a scoped draft is useful; whether 16:00 can move	(The case doesn't say whether this is the partner.)	The scope and the delivery time

The easy assumption: "13:00 to 16:00 is three hours for the work." From 14:30 the time belongs to your second role; it is not spare capacity for this brief.

3. Your two questions

Fact to share (one version; the chapter leaves it to you): you are rewriting the brief for 16:00 and want to use the 14:00 handoff for its review.

- **Question 1, to the reviewer:** "How long does the factual review take?" Answer: about 30 minutes; the handoff is 20 minutes at 14:00.
- **Question 2, to the reviewer:** "Do you have the latest brief?" Answer: no.

Both go to the reviewer because the reviewer holds both answers. "Is the partner flexible on 16:00?" is the right question for the wrong person.

4. The plan check

- Work: rewrite 60 minutes + factual review 30 minutes = 90 minutes
- Rewrite 60 minutes vs your block 13:15 to 14:00 (45 minutes): short by 15 minutes
- Review 30 minutes vs the handoff 14:00 to 14:20 (20 minutes): short by 10 minutes
- Your second role starts at 14:30. The time after that is not free for this brief.
- The handoff can carry: the scoped draft, the latest brief, and your review questions.

Plan	Verdict	Why
Rewrite the full brief in the 13:15 to 14:00 block and have it reviewed in the 14:00 handoff	gap	A 60-minute rewrite in a 45-minute block, and a 30-minute review in a 20-minute handoff. Neither fits.
Finish the rewrite after 14:30, alongside your second role	breaks	The second role starts at 14:30; it isn't spare capacity for this brief.
By 14:00, send the reviewer a scoped draft of the top section, the latest brief and your review questions; ask the owner of 16:00 to confirm that scope or a later time	fits, only if the top section is confirmed	The scoped draft fits the 45-minute block; the handoff carries your questions and the brief the reviewer was missing; the full version waits for the deadline owner's call.

Plan	Verdict	Why
Promise the complete, reviewed brief by 16:00 and review it yourself later	breaks	"Later" names no owner and no time, and from 14:30 you are in your second role.

Who decides the scope and the time: the owner of the 16:00 deadline.

The fact you still don't have: which section the partner needs most.

5. Replay: the partner requires the complete brief by 16:00

- The scoped draft no longer meets the request. The two plans that broke still break.
- The complete brief by 16:00 now needs a named reviewer who accepts the 30-minute check and gets the latest brief, or a later time. Neither is yours to arrange.
- The question goes to the owner of the 16:00 deadline: "For the complete version by 16:00 it would need a reviewer who accepts the 30-minute check and gets the latest brief, or a later time. Can 16:00 move? And who can name another reviewer?"
- Then stop. Don't pick a reviewer, and don't assume the owner of 16:00 is the person who may name one. When the request grows, your hours don't.

Fictional practice case. Every person and workplace is fictional; Otto is a fictional AI. Draft for review, not a final product.

Answer key, Chapter 7 worksheet: It Says It's Done

Fictional practice case (C09). These are the answers the case supports, not advice about any real project.

2. Who knows what

Who	What they know	What they don't know	What only they can decide
You	The 14:30 send time; what the memo argues (it rests on 8 sources); a check takes 5 minutes	How Otto read each source; what Dana will accept as a citation	What you check, and how you label the rest
Otto	Which sources it opened in full (16 in full, 4 from abstracts only; all 8 the memo relies on in full). It says so only when asked.	What Dana will accept as a citation	Nothing about citations. Otto describes its work and approves nothing.
Dana	The client's citation standard	(The case doesn't say what she already knows about Otto's reading.)	Which sources may be cited, including unchecked and abstract-only ones

The easy assumption: "Otto said 'summarized', so it's done." A summary is not a check of that summary against its source.

3. Your two questions

Fact you hold (one version): the memo goes to Dana at 14:30, it rests on 8 sources, and a check takes 5 minutes.

- **Question 1, to Otto:** "Did you read every source in full?" Answer: "No. 16 in full, 4 from abstracts only." Only Otto knows how it read them.
- **Question 2, to Otto:** "Were the 8 sources the memo relies on read in full?" Answer: "Yes. All 8 were read in full." You supply the 8; only Otto knows how it read them.

The citation call is not a question for Otto: "Can you approve these citations?" gets "No. I can describe what I did. Dana decides what gets cited." It goes to Dana as a decision.

A question that adds nothing: "Are you sure it's done?" Answer: "Yes, all 20 sources are summarized." (Asking again doesn't show how each one was read.) Also: "Can you check the summaries for me?" gets "I can summarize again, but that isn't checking a summary against its source."

4. The plan check

- Check every source: 20 sources x 5 minutes = 100 minutes, against 60 minutes available: short by 40 minutes
- Check only the sources the memo relies on: 8 x 5 = 40 minutes
- Label the rest as unchecked: 10 minutes. Buffer: 10 minutes. Total: 40 + 10 + 10 = 60 minutes
- Sources the memo doesn't rely on: 12. Of those, read from abstracts only: 4 (the other 8 were read in full but not checked by you)

Plan	Verdict	Why
Send the memo at 14:30 as done: the assistant summarized all 20	breaks	"Summarized" isn't "checked". It passes unverified claims to Dana and on to the client.
Check all 20 summaries against their sources, then send	gap	20 x 5 = 100 minutes against 60. You'd miss 14:30 by at least 40 minutes.

Plan	Verdict	Why
Ask someone else to check the other 12 sources	breaks	No one else is available to check sources before 14:30.
Check the sources the memo relies on, label the rest (including any abstract-only), and ask Dana to decide what can be cited	fits	8 x 5 = 40 minutes of checking, 10 minutes of labeling and a 10-minute buffer: 60 minutes. Dana gets an accurate list and makes the citation call.

The handoff to Dana lists: 8 checked, 8 summarized but unchecked, 4 abstract-only.

Who decides what may be cited: Dana.

Still open: Dana's citation decision. Otto approves nothing.

5. Replay: Dana says "Cite only sources you personally checked"

- The plan still fits. The 40 minutes of checking, the labeling and the buffer are unchanged.
- The memo drops to 8 citations, the 8 you checked.
- Tell Dana before 14:30 what was removed: the citations to the other 12 sources.
- Then stop. The rule changed the memo, not the plan, and the decision stays with Dana.

Fictional practice case. Every person and workplace is fictional; Otto is a fictional AI. Draft for review, not a final product.

Answer key, Chapter 8 worksheet: The Bot Said Friday

Fictional practice case (C10). These are the answers the case supports, not advice about any real vendor or order.

2. Who knows what

Who	What they know	What they don't know	What only they can decide or do
You	The Friday launch dependency	What the order record shows; who at the vendor can change it	What you ask, and what you tell the client owner
Chat agent	General delivery options. It states them when asked.	Your order ("I have general delivery options, not your order.")	Nothing about the order. It can't change orders.
Priya	The actual order, and whether Friday is possible	(The case doesn't say what she knows about the launch.)	Changing the order. She won't promise Friday in a conversation; if the date changes, it changes on the order record.
Client owner	(The case doesn't say what they have been told.)	The current delivery date, until you tell them	Whether to hold the launch if the parts arrive Monday

The easy assumption: "The chat agent said Friday is fine, so it's confirmed." A statement from something that can't change orders isn't a commitment on the order.

3. Your two questions

Fact you hold (one version): the client's launch needs the parts on Friday.

- **Question 1, to the chat agent:** "Can you change my order to Friday delivery?" Answer: "I can't change orders. I can describe delivery options in general." Only the agent can say what it can do.
- **Question 2, to the chat agent:** "Who can change my order?" Answer: "Your account manager, Priya."

A question that adds nothing: "Are you sure?" Answer: "Friday delivery is fine." (Asking again doesn't change what's on the order.) Also: "What date does my order show?" gets "I have general delivery options, not your order." and "Can you put Friday in writing?" gets "You can save this chat transcript. It isn't an order change."

The check you still owe, to Priya: "What delivery date does my order show?" Answer: "Monday. That's what the order record says." The chat agent's "fine" is not the record.

4. The plan check

- Launch needs the parts on: Friday. The order record shows: Monday.
- Days after the launch date until the record changes: 3 days (Saturday 1, Sunday 2, Monday 3)
- Who can change the order: Priya, the vendor's account manager.
- Who decides whether to hold the launch: the client owner.

Plan	Verdict	Why
Tell the client Friday is confirmed and keep the chat transcript as proof	breaks	A transcript isn't the order record, and the chat agent can't change orders.
Rebook with another vendor now, without asking the client owner	breaks	An unapproved rebooking creates cost and a second order. The launch decision is the client owner's.

Plan	Verdict	Why
Say nothing and see what arrives on Friday	gap	The client owner keeps planning a Friday launch without knowing what the order actually says.
Treat "Friday is fine" as unconfirmed: ask Priya for the date on the order record, and tell the client owner Friday isn't confirmed yet	fits	The chat agent can't change orders, so its "fine" isn't a commitment. Priya owns the order; the client owner decides about the launch.

Still to check, even for the plan that fits: what the order record actually says. The chat agent's "fine" is not the record.

5. Replay: the order record updates to Friday

- The gap closes because the record changed, not because of anything the chat said. Friday launch, Friday on the record.
- Cite the order record or Priya's written confirmation. Don't cite the chat agent or the chat transcript.
- Confirm the tracking or dispatch reference, then tell the client owner the current date.
- Then stop. The record decided the date; the launch decision stays with the client owner.

Fictional practice case. Every person and workplace is fictional; the vendor's chat agent is a fictional AI. Draft for review, not a final product.

Answer key, Chapter 9 worksheet: The Tidied Brief

Fictional practice case (C11). These are the answers the case supports, not advice about any real client or project.

2. Who knows what

Who	What they know	What they don't know	What only they can decide or do
You	The agreed plan and your estimates	Whether the client meant to add the page; who confirmed this version	What you ask, and what you send the client owner
The client's AI writing assistant (fictional AI)	The new wording	Whether the client intended the addition ("I can't tell you whether the client intended the addition"); your estimates ("I don't have your estimates")	Nothing about scope. It can suggest cuts but can't approve scope.
Client owner	Whether the comparison is wanted, and when	(The case doesn't say what the client owner has seen of the tidied brief.)	Confirming or removing the comparison. Only the client owner confirms scope.

The easy word: "Got it." Acknowledging the new brief can read as accepting it. A tidied document doesn't change the agreement by itself.

3. Your two questions

Fact you hold (one version): the agreed plan uses 5h of 5h: data 2h, recommendations 2h, handoff 1h.

- **Question 1, to the client's AI writing assistant (fictional AI):** "Did the client ask for the comparison?" Answer: "I can show you the new wording. I can't tell you whether the client intended the addition." Only the assistant can say what it holds; the intent is with the client.
- **Question 2, to the assistant:** "Who can confirm this version of the brief?" Answer: "Scope is the client owner's to confirm. A tidied document doesn't change the agreement by itself."

A question that adds nothing: "Is this the final brief?" Answer: "It's the latest draft I produced." Also: "How long will the comparison take?" gets "I don't have your estimates." and "Can you remove something to make room?" gets "I can suggest cuts, but I can't approve scope." To the client owner: "Can I just build it? It's only two hours." gets "Two hours from where? Your plan is already full." and "Why did the AI add it?" gets "I can't tell you why a tool worded something."

The check you still owe, to the client owner: "Did you mean to add the vendor comparison?" Answer: "Show me what it changes in the agreed plan, and I'll confirm it or remove it." What the client owner needs from you first: the diff, the tidied brief beside the agreed plan, with the cost.

4. The plan check

- Agreed plan: $2 + 2 + 1 = 5\text{h}$ of 5h
- With the comparison page: $2 + 2 + 1 + 2 = 7\text{h}$ against 5h
- How many hours short: 2
- Who can confirm a change to the scope: the client owner
- The diff: the vendor comparison page is on the tidied side only; it costs about 2h (your estimate).

Plan	Verdict	Why
Quietly build the new brief as sent	gap	$2 + 2 + 1 + 2 = 7\text{h}$ against 5h. Something slips unnoticed.
Deliver the agreed plan and ignore the new brief without saying so	breaks	Two versions of the scope stay in circulation.
Swap the recommendations section for the comparison page	needs someone's decision	$2 + 2 + 1 = 5\text{h}$, so it fits the hours, but only once the client owner approves removing the recommendations.
Reply to the client owner comparing the new brief with the agreed plan, and ask them to confirm the comparison page (and its 2h) or remove it	fits	The agreed plan is $2 + 2 + 1 = 5\text{h}$ of 5h; with the comparison it's 7h against 5h. The draft is a proposal; the client owner decides with the cost visible.

Still to check, even for the plan that fits: whether the client owner intended the comparison. The tidied draft is a proposal, not an agreement.

5. Replay: the client owner says the addition was unintended

- The client owner settled it, not the client's AI writing assistant and not the tidied file. The agreed 5h plan stands.
- The swap plan now breaks: the client owner didn't want the comparison, so there is nothing to swap in. (Ignoring the brief without saying so still breaks.)
- Write it down: confirm in writing that the agreed 5h plan stands and the comparison page is removed. $2 + 2 + 1 = 5\text{h}$ of 5h. Without it, two versions of the scope stay in circulation; with it, one version is the record.
- If the tidied file stays around, mark it as replaced by the agreed plan. Then stop. The client owner decided the scope; you don't need to explain why the page appeared.

Fictional practice case. Every person and workplace is fictional; the client's AI writing assistant is a fictional AI. Draft for review, not a final product.