

TEMPLATE PACK

Three templates for the moment *before you say yes*

A meeting prep card, a stakeholder map and a handover checklist. Each one has an instructions page, a blank template and a filled example on a fictional case.

1

Meeting prep card

Know your half, ask two questions, leave with an owner and a time.

2

Stakeholder map

Who holds the fact, who decides, who to ask first.

3

Handover checklist

What is final, what is pending, who closes it.

Fictional. Every case, person and workplace in this pack is fictional, and Otto is a fictional AI. The examples are practice material, not advice about a real situation.

Draft for review, not a final product. No price, license or offer is attached. This PDF comes in A4 and US Letter editions. The pack files also include Markdown and CSV versions of the templates, which are not inside this PDF.

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The move behind all three

1. **Share your half.** Say the one fact only you hold, such as your hours, dates or what was agreed.
2. **Ask two questions** of the people who hold the missing facts. One for a fact (how much, which, when), one for an owner (who decides).
3. **Say the yes the facts support.** That can be a plain yes, a scoped yes, or a proposal that names an owner and a time.

Which template do I need?

If this is happening	Start with
You are about to walk into a meeting where something will be asked or decided.	Meeting prep card
A request touches several people and you are not sure who knows, or who can approve.	Stakeholder map
You are handing over work, files or access at a set time.	Handover checklist
All of the above.	Map first (who), then prep card (the conversation), then checklist (the transfer).

A rule for all three. Write facts, not motives. Mark what you assume, and turn every assumption into a question. If an AI tool said "done" or "fine", write what it checked and what it assumed.

Meeting prep card

One page to fill in before a meeting where something will be asked, agreed or decided.

Use it when

- You are about to meet someone who will ask you for something, or a group that will decide something.
- A date, scope, access or record will be agreed, and you know only your half of the facts.
- An AI tool wrote or tidied the request you are answering.

Skip it when

- Everyone already has all the facts and the yes is small. Just say yes.
- A one-way announcement with nothing to decide.

Time: About 5 minutes before, 2 minutes after.

The two questions it builds on

1. **What don't I know that someone in this meeting does?**
2. **Who decides this, and what do they need from me first?**

A missing fact: how much, which, when.

An owner: the person who can say yes to the date, scope, access or record.

In the room: "What does the comparison need to show, and by when?" and "Who can approve changing the agreed scope?" (C02, fictional).

How to fill it in

1. **Outcome.** Write the decision you want in one sentence. If the meeting is information only, say so.
2. **My half.** Facts only: hours, dates, records, what was agreed. No opinions and no guesses.
3. **What I'm missing.** What you don't know and who probably holds it. "Nobody knows yet" is worth writing down.
4. **The one fact I'll share.** The fact from your half they need before they can decide. Say it in the first minute.
5. **My two questions.** One for a missing fact, one for an owner. Short enough to answer in a sentence.
6. **Who decides.** Name the owner of the date, scope, access or record. If you can't, question 2 is how you find out.
7. **If nothing is decided.** The proposal you will leave with, with an owner and a time. A proposal, not a promise.
8. **AI check.** Only if an AI tool shaped the request: what did it check, what did it assume, what will you verify yourself?

Watch for

- Asking for agreement ("Is that OK?") instead of asking for the missing fact.
- Asking someone who cannot decide. In C02 the requester says "I'm asking, not approving."
- Leaving with "I'll do it later" and no owner or time.

Swap a vague question for a fact question

Instead of	Ask
Can you give me more time?	What is the latest this is needed, and who set it?
Is that OK?	Who can approve changing the agreed scope?
Is it a small job?	What does it need to show, and by when?

Also in the pack files (not in this PDF): markdown/01_meeting_prep_card.md. Next page: the blank template. Then: a filled example on a fictional case.

Meeting prep card

Meeting _____

With _____

Date and time _____

Length _____

1 The outcome I want One sentence. If the meeting is information only, say so.

2 My half: what only I know Facts: hours, dates, records, what was agreed.

3 What I'm missing, and who holds it Their half. Write "unknown" if you can't tell who.

4 The one fact I'll share in the first minute The fact they need before they can decide.

5 My two questions One for a missing fact, one for an owner. Short and answerable: how much, which, when, who.

Ask 1 _____ to _____

Ask 2 _____ to _____

6 Who decides The owner of the date, scope, access or record.

Owner _____

They need _____

7 If nothing is decided: my proposal A proposal, not a promise. Name an owner and a time.

8 AI check Only if an AI tool is in the picture.

☐ An AI tool shaped this request.

It checked / assumed _____

I will verify _____

Minute plan Share the fact _____ min · Ask _____ min · Decide _____ min · Read back _____ min (decision, owner, by when)

After the meeting (2 minutes)

Decided (or proposed)

Owner

By when

Still unknown

Tell, and how

Meeting prep card

Fictional example. Case C02, Scope Swap. Alex leads delivery, Tomas is the requester, Otto is a fictional AI. Filled in before the meeting, then the "After" strip.

Meeting	With	Date and time	Length
Check-in on the comparison-page request	Tomas (the requester)	Before I reply to Tomas	15 minutes

1 The outcome I want One sentence. If the meeting is information only, say so.

Decide what happens to the comparison page without breaking the 5h already allocated.

2 My half: what only I know Facts: hours, dates, records, what was agreed.

I lead delivery. 5h remain, all allocated:

data 2h + recommendations 2h + handoff 1h = 5h.

The comparison page is about 2h (my estimate).

Adding it: 2h + 2h + 1h + 2h = 7h against 5h.

3 What I'm missing, and who holds it Their half. Write "unknown" if you can't tell who.

When Tomas needs it, and what it must show.

Who can approve changing the agreed scope.

Whether the client asked for it or the AI added it.

4 The one fact I'll share in the first minute The fact they need before they can decide.

The 5 hours are already allocated, and the page is about 2h on top.

5 My two questions One for a missing fact, one for an owner. Short and answerable: how much, which, when, who.

Ask 1 What does the comparison need to show, and by when? to Tomas

Ask 2 Who can approve changing the agreed scope? to Tomas

6 Who decides The owner of the date, scope, access or record.

Owner Unknown before the meeting. Question 2 finds out.

They need The 5h picture and a real date.

7 If nothing is decided: my proposal A proposal, not a promise. Name an owner and a time.

Keep the agreed 5h package. Hold the comparison

until the scope owner confirms when, or whether, it is needed.

Owner: the scope owner. Time: ask in the meeting.

8 AI check Only if an AI tool is in the picture.

☒ An AI tool shaped this request.

It checked / assumed Otto (fictional AI) tidied the client's brief and added the page.

I will verify Whether the client asked for it, or Otto added it.

Minute plan Share the fact 1 min · Ask 6 min · Decide 6 min · Read back 2 min (decision, owner, by when)

After the meeting (2 minutes)

Decided (or proposed)

Proposal: keep the agreed 5h. The comparison is for next month's planning, not this delivery.

Owner

Morgan (scope owner) confirms.

By when

When Morgan replies.

Still unknown

Whether the comparison is needed at all.

Tell, and how

Tomas and Morgan: two lines, the 5h picture and the proposal.

Stakeholder map

One page that shows who holds which facts, who decides, and who to ask first.

Use it when

- A request touches more than one person and you are not sure who can approve it.
- Before a handoff, a kickoff or a change of scope.
- An AI tool or a vendor's bot is one of your sources and you need to know what it actually checked.

Skip it when

- One person holds every fact and every decision. Use the meeting prep card.

Time: About 10 minutes, then update it when you learn something.

The two questions it builds on

1. Who holds the fact I'm missing?

That is the "Holds" column: facts only they know.

2. Who decides, and can I reach them?

That is the "Decides" and "Reachable" columns: one owner per decision.

In the room: "Do you have the latest brief?" and "Who may move the 16:00 date or name another reviewer?" (COG, fictional).

How to fill it in

1. **Decision line.** What needs deciding, in one line.
2. **Who.** One row per person or role whose facts or approval you need. Give an AI tool its own row, labeled as a tool. Add yourself: your half is what you share first.
3. **What they hold.** Facts you are missing that they hold. Write what they said or what a record shows, never why they did it.
4. **What I hold.** What you know that they lack. It is what you will share first.
5. **What they decide.** Exactly what they can approve: date, scope, access, record. "Nothing" is a valid answer.
6. **Reachable when.** When you can really reach them, from a calendar or their own words.
7. **Confidence.** Confirmed (a record or their own words), Assumed (you believe it, unchecked) or Unknown. Every Assumed or Unknown needs a question in the last column.
8. **Question or next step.** One short question or action. Number the order of contact in the first column.
9. **Owner check.** Below the table: is the decision's owner named? If not, finding the owner is your first question.

Watch for

- Guessing motives. Write the fact, not the reason.
- Two owners for one decision, or none.
- Treating availability as authority. Someone being reachable at 16:30 does not mean they can approve.

Also in the pack files (not in this PDF): markdown/02_stakeholder_map.md and csv/stakeholder_map_blank.csv. Next page: the blank template. Then: a filled example on a fictional case.

Stakeholder map

The decision _____

Order	Who	What they hold (facts I'm missing)	What I hold (they lack)	What they decide	Reachable when	Confidence	My question or next step

Decision owner check

Who decides? _____

☐ Named and confirmed ☐ Assumed ☐ Unknown

If not confirmed _____

Facts nobody has yet

Each one becomes a question.

Confidence: Confirmed = a record or their own words. Assumed = I believe it, unchecked. Unknown = no idea yet. Write what was said, never why.

Stakeholder map

Fictional example. Case C06. The partner and the reviewer are fictional, Otto is a fictional AI. Only facts from the case are used.

The decision Deliver the revised one-page brief for the 16:00 request without promising what does not fit.

Order	Who	What they hold (facts I'm missing)	What I hold (they lack)	What they decide	Reachable when	Confidence	My question or next step
1	Partner who asked at 13:00 (may or may not own the 16:00 deadline)	What the one-page brief must contain at minimum. Whether 16:00 can move.	Rewrite is about 60 min. My focus block is 45 min. A full rewrite plus review will not fit my 13:15-14:00 block or the 14:00 handoff.	Unknown: the case does not say who owns the 16:00 date or the scope.	Not known	Unknown	Ask: what is the minimum the brief must cover, and who owns 16:00? Offer a scoped draft first.
2	Reviewer	Factual review takes about 30 min. Their handoff is 14:00-14:20 (20 min). They do not have the latest brief.	The latest brief, a scoped draft of the top section, and my review questions.	Nothing about scope or the date ("that isn't my call").	Handoff 14:00-14:20	Confirmed (their own words)	Send by 14:00: scoped draft, latest brief, review questions. Name who reviews the full version.
3	Otto (fictional AI planning assistant)	What it assumed: the review fits the 14:00 handoff and I finish the rewrite after 14:30. It checked neither.	The review is 30 min, the handoff is 20, and the reviewer lacks the latest brief.	Nothing. It can draft review questions; the factual check needs the reviewer.	Now (a tool)	Confirmed (I asked it)	Asked: what did you assume to make it fit? Use that answer, not its "yes".
n/a	My second role (starts 14:30)	Its start time is fixed.	n/a	Unknown. I do not assume it can be paused.	From 14:30	Assumed	Protect the 14:30 start in my plan. It is not spare capacity for this brief.
n/a	Me (the writer)	n/a	Rewrite about 60 min. Focus block 13:15-14:00. Second role from 14:30. Request: revised brief by 16:00.	What I offer, and when I say it.	n/a	Confirmed	Share these hours first, then ask.

Decision owner check

Who decides? Who decides the 16:00 date and the scope?

☐ Named and confirmed ☐ Assumed ☒ Unknown

If not confirmed Ask the partner who owns 16:00 (row 1).

Facts nobody has yet

Each one becomes a question.

The brief's minimum acceptance criterion.

Whether 16:00 can move, and who may say so.

Who accepts the 30-minute factual review of the full version.

Confidence: Confirmed = a record or their own words. Assumed = I believe it, unchecked. Unknown = no idea yet. Write what was said, never why.

Handover checklist

One page for handing work, files or access to someone else at a set time, with the open items named.

Use it when

- You are handing work, files or access to someone at a set time.
- The receiver has a short overlap with you, or a later window.
- Some of the work is still open, or a check has to be done by someone else.

Skip it when

- One file, fully final, and the receiver is ready. A two-line message is enough.

The two questions it builds on

1. When can the receiver actually take it?

Their overlap and their next window, from their calendar or their own words.

2. Who closes what is still open, and by when?

An owner and a time for every pending item. It may not be you.

In the room: "When can the receiver actually take the files?" and "Who can check the two pending files, and when?" (C05, fictional).

Time: About 10 minutes before, 2 minutes to close.

How to fill it in

1. **Header.** What, from, to, handoff time, the receiver's overlap and next window, and your own preparation window. Write their times from their words or calendar.
2. **Manifest.** One row per item: Final or Pending, never "nearly". Note where it lives and what it depends on.
3. **Count.** Final plus pending must equal the total. If the numbers don't match, stop and recount.
4. **Pending items.** For each: what is missing, who can close it, by when, and whether the receiver has been told. It may be someone other than you.
5. **Acceptance.** Is this a progress transfer or a final acceptance? Who accepts, and what counts as accepted?
6. **Access and authority.** Who can grant each access or approval. Being reachable is not the same as being authorized.
7. **Before you send.** Check each line only when it is true. Leave a box empty and write what is open.
8. **Close the loop.** Send the short message with the manifest. Write who closes the open items, and when.

Watch for

- "I'll send what I have" with no manifest.
- "Current copy means approved." A copy is not an approval.
- Asking the receiver to extend their day. Propose a follow-up window instead, and let the person who decides confirm it.

Also in the pack files (not in this PDF): markdown/03_handover_checklist.md. Next page: the blank template. Then: a filled example on a fictional case.

Handover checklist

What is handed over _____ From _____ To _____
 Handoff at _____ Receiver overlap _____ Receiver next works _____
 My preparation window _____

1 Manifest One row per item. Final or Pending, never "nearly".

#	Item	State	Where it lives	Depends on / note
1		Final / Pending		
2		Final / Pending		
3		Final / Pending		
4		Final / Pending		
5		Final / Pending		
6		Final / Pending		
7		Final / Pending		
8		Final / Pending		

Count: _____ final + _____ pending = _____ items. If it does not add up, recount.

2 Pending items Who can close each one, and when. It may not be you.

Item	What is missing	Who can close it	By when	Receiver told
				☐
				☐

3 Acceptance Progress transfer or final acceptance?

This is a _____
 Who accepts _____

4 Access and authority Who can grant it. Reachable is not authorized.

5 Before you send Check a line only when it is true.

- ☐ Manifest lists final and pending items separately
- ☐ Every pending item has an owner and a time
- ☐ Receiver's overlap and next window written from their own words

- ☐ Pending items are labeled in the file names and in the message
- ☐ Nothing asks the receiver to extend their day
- ☐ Access and approvals checked, not assumed
- ☐ The person who decides has said yes to this handoff

If an AI tool made or checked any of it, I verified _____

6 Close the loop Send the manifest with this message, and say who closes what is open.

Loop closed Date, time, by whom: _____

Handover checklist

Fictional example, case C05. People are fictional; Otto is a fictional AI. Files are numbered: the case names none.

What is handed over Eight-file package From Me (sender) To Receiving freelancer
 Handoff at 10:00 Receiver overlap 09:45-10:00 Receiver next works after 14:00
 My preparation window 09:00-09:35
(35 min)

1 Manifest One row per item. Final or Pending, never "nearly".

#	Item	State	Where it lives	Depends on / note
1	File 1	Final	the package	Assumed usable without files 7 and 8: check dependency
2	File 2	Final	"	
3	File 3	Final	"	
4	File 4	Final	"	
5	File 5	Final	"	
6	File 6	Final	"	
7	File 7	Pending	"	Needs the 30-min quality check
8	File 8	Pending	"	Needs the 30-min quality check

Count: 6 final + 2 pending = 8 items. If it does not add up, recount.

2 Pending items Who can close each one, and when. It may not be you.

Item	What is missing	Who can close it	By when	Receiver told
Files 7 and 8	<u>Quality check, about 30 min</u>	Client's <u>QA</u> reviewer (not me)	After 14:00	☒
				☐

3 Acceptance Progress transfer or final acceptance?

This is a Progress transfer of the six final files. Final acceptance waits for the quality check.

Who accepts The client. Open: will the client accept six now? Ask.

4 Access and authority Who can grant it. Reachable is not authorized.

Only the client can change who runs the quality check.

Receiver's after-14:00 window is a proposal until the client confirms it.

5 Before you send Check a line only when it is true.

- ☒ Manifest lists final and pending items separately
- ☒ Every pending item has an owner and a time
- ☒ Receiver's overlap and next window written from their own words

- ☒ Pending items are labeled in the file names and in the message
- ☒ Nothing asks the receiver to extend their day
- ☐ Access and approvals checked, not assumed
- ☐ The person who decides has said yes to this handoff

If an AI tool made or checked any of it, I verified Otto (fictional AI) said all eight could be ready. It had assumed I would run the quality check. Only the client's QA reviewer can.

6 Close the loop Send the manifest with this message, and say who closes what is open.

Six of the eight files are final and attached with a manifest. Files 7 and 8 are pending a 30-minute quality check that only the client's QA reviewer can run, after 14:00. Proposal: you take them after 14:00, if the client confirms. Our overlap is 09:45-10:00.

Loop closed Open until the check is done after 14:00. Owner: the client's QA reviewer.

Editing, printing and practice

The files

This PDF is one part of the pack. The pack files also include the Markdown and CSV versions listed here; they are separate files, not pages of this PDF.

File	What it is
markdown/00_start_here.md	The contents and the move, in plain text.
markdown/01_meeting_prep_card.md	Instructions, blank card (copy it) and the filled example.
markdown/02_stakeholder_map.md	Instructions, blank map as a table and the filled example.
markdown/03_handover_checklist.md	Instructions, blank checklist and the filled example.
csv/stakeholder_map_blank.csv	The map's columns and empty rows.
csv/stakeholder_map_example_C06.csv	The filled C06 example, fictional.
template_pack_A4.pdf, template_pack_Letter.pdf	This pack, typeset. Print the blank pages.

Editing

- **Markdown** (pack files). Open in any text editor. Copy the blank section into your notes, a document or a ticket. Boxes are `[ ]`; put an `x` inside to check one.
- **CSV** (pack files). In Google Sheets choose File, Import, Upload, then "Replace current sheet". In Excel choose Data, From Text/CSV. The file is UTF-8 with a header row and has no formulas.
- **Paper** (this PDF). Print the blank pages at 100% (no "fit to page") on A4 or Letter. The landscape map fits both.

Keep it clean

- Keep confidential details out of anything you share. The cards are for your own preparation.
- Use them on the situation, never as a score or a judgment of a person.
- Update the map when you learn something. An assumption you have checked becomes Confirmed; one you have not stays Assumed.

Practice the move

The eight free cases let you try the two questions on a fictional situation and see what each answer reveals. The examples in this pack come from that same set, so the numbers match.

Play free: [\[PUBLIC_URL\]/practice/](#)

Fictional. Every case, person and workplace in this pack is fictional, and Otto is a fictional AI. The examples are practice material, not advice about a real situation. Draft for review, not a final product; no price or offer attached.