

TEMPLATE PACK V2 ADD-ON

Two more templates for the moment *before you say yes*

A request-clarification checklist and a decision-rights sheet. Each one has an instructions page, a blank template and a filled example on a fictional case.

4

Request-clarification checklist

What to ask before you say yes: the two questions, then follow-ups for a manager, a peer, a client, another team or a handover.

5

Decision-rights sheet

Who decides, who is consulted first, who is informed after, and by when.

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. This add-on continues the numbering of the three-template pack (templates 1 to 3) and is a separate PDF. It comes in A4 and US Letter editions. The pack files also include Markdown and CSV versions, which are not inside this PDF.

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The move behind both

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
Someone has just asked you for something and you have not answered yet.	Request-clarification checklist
The work touches several people and you are not sure who can say yes to what.	Decision-rights sheet
You need to know who holds a fact, and who to ask first.	Stakeholder map (template 2, in the three-template pack)
You are about to walk into a meeting where something will be decided.	Meeting prep card (template 1, in the three-template pack)
You are handing work over at a set time.	Handover checklist (template 3, in the three-template pack)

Used together. Checklist first (what to ask before you answer), then the decision-rights sheet when the answers show several people are involved. A rule for both: 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.

Request-clarification checklist

One page for the moment someone asks you for something, so you ask before you answer.

Use it when

- Someone asks for something and your first move is to say yes, or to say no.
- The request has a date, an amount or an approval you have not seen.
- An AI tool wrote, tidied or estimated the request.

Skip it when

- The request is small, complete and yours to accept. Just say yes.
- You already know the amount and who decides.

Time: About 5 minutes, before you reply.

The two questions it builds on

1. **What don't I know that someone here does?**
A missing fact: how much, which, when.
2. **Who decides this, and what do they need from me first?**
An owner: the person who can say yes to the date, scope, access or record.

In the room: "How many hours do you have before Friday noon?" and "Who owns the Friday noon commitment?" (CO1, fictional).

How to fill it in

1. **Request.** Write what was asked in their words, who asked, and when they need your answer.
2. **Situation.** Check who is asking: manager, peer, client, another team, or a handover. Each has its own follow-ups.
3. **Question 1.** Ask for the missing fact: how much, which, when. Write the answer and its basis: their words, a record, or your assumption.
4. **Question 2.** Ask who decides, and what they need from you first. Ask a person, not the tool.
5. **Follow-ups.** Check the ones you need answered before you say yes. Use the group that matches; skip the rest.
6. **What I know.** Left: confirmed by a record or their own words. Right: assumed or unknown. Each item on the right becomes a question.
7. **AI check.** If an AI tool shaped the request, write what it checked, what it assumed, and what you will verify yourself.
8. **My reply.** Choose one: yes as asked, a scoped yes (what is in, what is out), or not yet (a proposal with an owner and a time).
9. **Before I reply.** Check each line only when it is true. Leave a box empty and say what is open.

Watch for

- Saying yes to be helpful, then finding the amount later.
- Asking "Is that OK?" when the missing thing is a number or an owner.
- Treating a tool's yes as a plan. Write what it checked.

Swap a vague question for a fact question

Instead of	Ask
Is it a small job?	How much does it need to cover, and by when?
Can you squeeze it in?	What comes off the list if this goes on it, and who decides?
Is that OK with everyone?	Who has to agree, and have they?

Also in the pack files (not in this PDF): markdown/04_request_clarification_checklist.md. Next page: the blank template. Then: a filled example on a fictional case.

Request-clarification checklist

Request from _____ Answer needed by _____

Situation ☐ Manager ☐ Peer ☐ Client ☐ Cross-team ☐ Handover

1 The request, in their words What was asked.

2 My two questions One for a missing fact, one for an owner: how much, which, when, who.

Ask 1 _____

Answer _____

Ask who _____ Basis ☐ Their words ☐ A record ☐ Assumed

Ask 2 _____

Answer _____

Ask who _____ Basis ☐ Their words ☐ A record ☐ Assumed

3 Follow-ups for this situation Check what you need answered before you say yes. Use the matching group.

Manager

- ☐ What comes off my list if this goes on it?
- ☐ What does done look like, in one sentence?
- ☐ Is the date yours, or does someone above you set it?

Peer

- ☐ What is it for, and by when?
- ☐ Who else has to agree before I start?
- ☐ Is this a one-off, or will it come back?

Client

- ☐ What must it contain or show to be accepted?
- ☐ Who on your side owns the date and can approve a scope change?
- ☐ Can any part follow after the deadline, and who confirms that?

Cross-team

- ☐ Which team owns it, and who is the person there?
- ☐ What does your team need from mine first?
- ☐ When can your team actually respond?

Handover

- ☐ When can the receiver actually take it, in their words?
- ☐ What is still open, and who can close it?
- ☐ Is this a progress transfer or a final acceptance, and who accepts?

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

- ☐ An AI tool shaped this request.

It checked / assumed

I will verify

4 Confirmed Record or their words.

5 Assumed or unknown Each one becomes a question.

6 My reply Choose one. A scoped yes or a proposal waits for the person who decides.

- ☐ Yes as asked _____
- ☐ Scoped yes _____
- ☐ Not yet: my proposal _____

7 Before I reply Check a line only when it is true.

- ☐ I know the amount ☐ I know who decides
- ☐ Every assumption is marked, and has a question
- ☐ A person checked anything an AI tool said yes to
- ☐ My reply names an owner and a time for what is open

Request-clarification checklist

Fictional example: case C01, Fixed Deadline. Alex, the client and the demo owner are fictional; Otto is a fictional AI.

Request from The client (fictional) Answer needed by Friday noon (fixed)

Situation ☐ Manager ☐ Peer ☒ Client ☐ Cross-team ☐ Handover

1 The request, in their words What was asked.

A client demo, fixed for Friday noon. Ready by then: core, handoff and polish?

2 My two questions One for a missing fact, one for an owner: how much, which, when, who.

Ask 1 How many hours do you have before Friday noon, and how long does each part take?

Answer Five hours. Nothing extra has been approved. Core 3h, handoff 1h, polish 3h.

Ask who Alex (delivery lead)

Basis ☒ Their words ☐ A record ☐ Assumed

Ask 2 Who owns the Friday noon commitment, and can polish come after the demo?

Answer Not answered yet. A later polish slot is only a proposal until an authorized person confirms it.

Ask who The demo owner (no name in the case)

Basis ☐ Their words ☐ A record ☒ Assumed

3 Follow-ups for this situation Check what you need answered before you say yes. Use the matching group.

Manager

- ☐ What comes off my list if this goes on it?
- ☐ What does done look like, in one sentence?
- ☐ Is the date yours, or does someone above you set it?

Peer

- ☐ What is it for, and by when?
- ☐ Who else has to agree before I start?
- ☐ Is this a one-off, or will it come back?

Client

- ☒ What must it contain or show to be accepted?
- ☒ Who on your side owns the date and can approve a scope change?
- ☒ Can any part follow after the deadline, and who confirms that?

Cross-team

- ☐ Which team owns it, and who is the person there?
- ☐ What does your team need from mine first?
- ☐ When can your team actually respond?

Handover

- ☐ When can the receiver actually take it, in their words?
- ☐ What is still open, and who can close it?
- ☐ Is this a progress transfer or a final acceptance, and who accepts?

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

☒ An AI tool shaped this request.

It checked / assumed

Otto (fictional AI): "All three parts can be ready by Friday noon." Assumed two extra hours on Thursday evening; no one approved them.

I will verify

Whether the demo owner wants polish later.

4 Confirmed Record or their words.

5h free; nothing extra approved (Alex).

Core 3h, handoff 1h, polish 3h (Alex).

3 + 1 + 3 = 7h against 5h: no fit.

Friday noon is fixed.

5 Assumed or unknown Each one becomes a question.

Who owns the Friday noon commitment?

What must core and handoff contain to be accepted?

Can optional polish be accepted after the demo, and when?

Are the five hours uninterrupted and in the same time zone?

6 My reply Choose one. A scoped yes or a proposal waits for the person who decides.

☐ Yes as asked Does not fit: 7h of work in 5h.

☒ Scoped yes In: core + handoff by Friday noon (3 + 1 = 4h of 5h). Out: polish, for the demo owner to decide.

☐ Not yet: my proposal Polish later is only a proposal until the demo owner confirms it.

7 Before I reply Check a line only when it is true.

☒ I know the amount ☐ I know who decides

☒ A person checked anything an AI tool said yes to

☒ Every assumption is marked, and has a question

☐ My reply names an owner and a time for what is open

Decision-rights sheet

A light RACI grid: for each decision, who decides, who is consulted first, who is informed after, and by when.

Use it when

- Several people touch the work and it is not clear who can say yes to what.
- Before a handoff, a change of scope or a review where someone will approve something.
- A tool or bot says "fine" or "done" and you need to know whether it can decide anything.

Skip it when

- One person owns every decision. Write it in one line.

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

The two questions it builds on

1. What don't I know that someone here does?

That is the Consulted column: the people who hold the facts.

2. Who decides this, and what do they need from me first?

That is the Decides column, and "what they need" is your next step.

In the room: "Can I cite all 20 sources?" and "Is anyone free to help check sources before 14:30?" (C09, fictional).

How to fill it in

1. **The work.** What is happening, in one line, and the time now.
2. **Decision.** One row per decision, written as a sentence: what gets decided (a date, a scope, an access, a record). Split a row if two things are decided.
3. **Decides.** One name: the person who can say yes and have it hold. If you don't know, write Unknown. Never write two.
4. **Consulted and informed.** Consulted people hold facts the decision needs; they give input before. Informed people hear the result after. Neither group decides.
5. **By when.** The time the decision must be made by, from a calendar or their own words.
6. **Confidence.** Confirmed (a record or their own words), Assumed or Unknown. Every Assumed or Unknown needs a question in the last column.
7. **Next step.** One short question or action, naming who you will ask.
8. **Not deciders.** Write any tool or person who can describe the work but cannot approve it.
9. **Rules check.** Check each line when it is true. An empty box is the next thing to fix.

Watch for

- Two names in Decides, or none. Write one name, or Unknown.
- Treating consulted as approved. Input is not a yes.
- Treating a tool's "done" or "approved" as the decision. Write who decided.

Also in the pack files (not in this PDF): markdown/05_decision_rights_sheet.md and csv/decision_rights_blank.csv. Next page: the blank template. Then: a filled example on a fictional case.

Decision-rights sheet

The work _____ Time now _____

#	Decision	Decides (one name)	Must be consulted (before)	Informed (after)	By when	Confidence	My next step

Not deciders

Who _____

Says _____

Can describe the work but cannot approve it: a tool, a bot, someone reporting status.

Rules check

- ☐ Every row has one entry in Decides (Unknown counts; two names do not)
- ☐ Every person who decides can be reached before the By-when time
- ☐ Consulted people give input before, informed people hear after; neither decides
- ☐ No tool or bot is written as the one who decided

Gaps to close

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 or shown, never why.

Decision-rights sheet

Fictional example. Case C09, It says it's done. Dana reviews the memo; Otto is a fictional AI research assistant. Only facts from the case are used.

The work Memo to Dana at 14:30, with sources summarized by an AI research assistant.

Time now 13:30

#	Decision	Decides (one name)	Must be consulted (before)	Informed (after)	By when	Confidence	My next step
1	Which sources may be cited: checked, unchecked or abstract-only.	Dana	Me: which 8 sources I checked. Otto (fictional AI research assistant): how it read them, 16 in full and 4 from abstracts only, when asked.	Me: I record her call in the handoff.	14:30 (the memo goes to Dana)	Confirmed (Dana's own words)	Send Dana the list: 8 checked, 8 summarized but unchecked, 4 abstract-only. Ask for her call.
2	How I spend the 60 minutes before 14:30.	Me	Nobody else can help. Dana: "No one else is available before 14:30."	Dana, in the handoff.	Now (13:30)	Assumed (the case names no one else who sets it)	Check the 8 sources the memo relies on (8 x 5 = 40 min), label the other 12 (10 min), keep a buffer (10 min): 40 + 10 + 10 = 60 min.
3	Whether the memo can go after 14:30.	Unknown	Dana, who is reviewing it at 14:30. The case does not say who can move that time.	n/a	Before 14:30	Unknown	Plan for 14:30. Do not assume it can move. Ask who can, only if the plan fails.

Not deciders

Who Otto (fictional AI research assistant)

Says "No. I can describe what I did. Dana decides what gets cited."

Can describe the work but cannot approve it.
In the case: not a decider.

Rules check

- ☒ Every row has one entry in Decides (Unknown counts; two names do not)
- ☐ Every person who decides can be reached before the By-when time
- ☒ Consulted people give input before, informed people hear after; neither decides
- ☒ No tool or bot is written as the one who decided

Gaps to close

Each one becomes a question.

Who can move the 14:30 review time. The case does not say.

What citation standard does Dana apply?

Whether Dana will accept the 4 abstract-only sources, labeled.

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

Editing, printing and practice

The files

This PDF is one part of the add-on. 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/04_request_clarification_checklist.md	Instructions, blank checklist (copy it) and the filled example.
markdown/05_decision_rights_sheet.md	Instructions, blank sheet as a table and the filled example.
csv/decision_rights_blank.csv	The sheet's columns and empty rows.
csv/decision_rights_example_C09.csv	The filled C09 example, fictional.
template_pack_v2_addon_A4.pdf, template_pack_v2_addon_Letter.pdf	This add-on, 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 sheet fits both.

Keep it clean

- Keep confidential details out of anything you share. The pages are for your own preparation.
- Use them on the situation, never as a score or a judgment of a person.
- Update the sheet 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 add-on come from that same set, so the numbers match.

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

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