

## TEMPLATE PACK V3 ADD-ON

# Two more templates to *push back* and *check in*

A pushback script pack and a 1:1 agenda. Each one has an instructions page, a blank template and a filled example on a fictional case.

6

**Pushback script pack**

Five short moves, "Yes, if", "Not yet, because", "Which one moves?", "Who decides?" and "In writing, please", with a starter for a manager, a peer, a client, another team or a handover.

7

**1:1 agenda**

Open requests, what changed, who decides, what is at risk and one ask, with the two questions built in.

**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 earlier packs (templates 1 to 3, then 4 and 5) 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                                                     |
|--------------------------------------------------------------------------------------|----------------------------------------------------------------|
| You cannot say a plain yes, and you want to say why without saying no to the person. | Pushback script pack                                           |
| You have a regular meeting with the same person and requests are piling up.          | 1:1 agenda                                                     |
| Someone has just asked you for something and you have not answered yet.              | Request-clarification checklist (template 4, in the v2 add-on) |
| The work touches several people and you are not sure who can say yes to what.        | Decision-rights sheet (template 5, in the v2 add-on)           |
| You are about to walk into a meeting where something will be decided.                | Meeting prep card (template 1, in the three-template pack)     |

**Used together.** Put the open requests on the 1:1 agenda. When one does not fit, pick a move from the pushback script pack and say it in the meeting. 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.

# Pushback script pack

Short scripts for the moment you need to push back on a request without saying no to the person. Each one states a fact you hold and asks for a fact you lack.

## Use it when

- A request does not fit your hours, the date or the plan.
- You are about to say "I'll try" to keep the peace.
- Someone, or a tool, said yes on your behalf, or said "fine" about something only another person can approve.

## Skip it when

- The request fits and is yours to accept. Just say yes.
- It is an emergency: follow your organization's own process.

**Time:** About 5 minutes to prepare. The scripts take under a minute to say.

## The two questions it builds on

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

The script puts your fact first, then asks for the fact you lack: how much, which, when.

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

That is "Who decides?" and "In writing, please": send it to the owner, then make it a record.

In the room: "Who can confirm a change to the scope?" and "Did you mean to add the vendor comparison?" (C11, fictional).

## The five moves

| Move               | Use it to                                                                                        |
|--------------------|--------------------------------------------------------------------------------------------------|
| Yes, if            | Accept, with a condition you can name.                                                           |
| Not yet, because   | Defer, with the fact that stops you today and when you can say more.                             |
| Which one moves?   | Two things collide. Ask which one gives way: the scope, the date or something else on your list. |
| Who decides?       | Send the question to the person who can say yes and have it hold.                                |
| In writing, please | Ask for a record, so the agreement is one version everyone can see.                              |

## How to fill it in

1. **What was asked.** Check who is asking: manager, peer, client, another team or a handover. Write what they asked in their words, not your reading of it.
2. **The fact I hold.** One sentence with a number, a time or a record. Say it first.
3. **Missing, and who decides.** Write the fact you lack. Write one name for who decides, or Unknown.
4. **My moves.** Pick one to three from the five. The script bank has a starter for each situation. Replace each blank with a fact, keep it to at most two sentences, ask, then stop and write their reply.
5. **Before I say it.** Check each line only when it is true. An empty box is what to fix first.
6. **My follow-up in writing.** Send what was agreed as a message, with the owner and the time.

## Watch for

- Saying no to a person when the missing thing is a number or an owner. Say the number.
- Using a script to win. It asks for a fact or an owner; the person who decides still decides.
- Treating a tool's or a chat's yes as the record. A chat message is not the record: ask for the record.
- Guessing why they asked. Write what was said.

## Swap a vague question for a fact question

| Instead of       | Ask                                                              |
|------------------|------------------------------------------------------------------|
| I'll try.        | Yes, if _____. Name the condition.                               |
| I can't.         | Not yet, because _____. Name the fact and when you can say more. |
| That's too much. | Both won't fit by _____. Which one moves?                        |

Also in the pack files (not in this PDF): markdown/06\_pushback\_script\_pack.md and csv/pushback\_script\_bank.csv. Next page: the script bank. Then the blank sheet, then a filled example on a fictional case.

## Script bank: five moves, five situations

**How to use it.** Each line is a starter. Replace every \_\_\_\_ with a fact: a number, a time, a name or a record. Say your fact first, then the question. Use one to three moves, not all five.

| Move                                                                                                                        | Manager                                                                             | Peer                                                                             | Client                                                                                            | Cross-team                                                                  | Handover                                                                                           |
|-----------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| <b>Yes, if</b><br>Accept, with a condition you can name.                                                                    | Yes, if ____ comes off my list, or if you confirm the date can move to ____.        | Yes, if it can wait until ____, or if you can tell me what it has to include.    | Yes, if you confirm the extra ____ and tell me what it replaces.                                  | Yes, if your team confirms ____ by _____. I will start when that is in.     | Yes, if what is open has an owner and a time, I can take it at ____.                               |
| <b>Not yet, because</b><br>Defer, with the fact that stops you today and when you can say more.                             | Not yet: I have ____ free and this needs _____. I can say yes once ____ is decided. | Not yet, because ____ is committed until _____. I can look at it at ____.        | Not yet, because the plan uses ____ of _____. I will reply by ____, once you confirm scope.       | Not yet, because I don't have ____ from your team. When can you send it?    | Not yet, because ____ is still open. I will hand over at ____, or name who owns it.                |
| <b>Which one moves?</b><br>Two things collide. Ask which one gives way: the scope, the date or something else on your list. | Both won't fit by _____. Which one moves: ____ or ____?                             | I can do ____ or ____ by ____, not both. Which one moves?                        | With this added it is ____ against _____. Which one moves: the scope or the date?                 | Our two dates meet at _____. Which one moves, and who can say so?           | Your window is ____ and the work needs _____. Which one moves: the time or the scope?              |
| <b>Who decides?</b><br>Send the question to the person who can say yes and have it hold.                                    | Is ____ yours to decide, or does someone above you set it?                          | I can start once ____ agrees. Who has to agree?                                  | Who on your side can confirm a change to ____? I will send it to them.                            | Who on your team can change ____? I will write to them directly.            | Who accepts this: you, or someone else? I will send it to that person.                             |
| <b>In writing, please</b><br>Ask for a record, so the agreement is one version everyone can see.                            | Can you confirm that in a message? I will note ____ and the time.                   | Could you put that in the ticket or a message, so we both work from one version? | Please confirm in writing: ____ is in or out, and the date is _____. I will reply once I have it. | Please put ____ in the record, not only in chat. I will plan on the record. | Please write the open items and their owners in the handover note. I will confirm receipt at ____. |

Starters are wording to adapt, not rules. Keep the question short, name who decides, and stop after asking. The person who decides still decides. Fictional practice template, draft for review.

## Pushback script sheet

Asked by \_\_\_\_\_ Answer needed by \_\_\_\_\_

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

### 1 What was asked, in their words

\_\_\_\_\_

### 2 The fact I hold One sentence with a number, a time or a record.

\_\_\_\_\_

### 3 What I am missing, and who decides One name for who decides, or Unknown.

Missing \_\_\_\_\_

Decides \_\_\_\_\_

### 4 My moves Use one to three. Write your words, then ask and stop.

| Use                      | Move                              | My words | Their reply (write it here) |
|--------------------------|-----------------------------------|----------|-----------------------------|
| <input type="checkbox"/> | Yes, if ____                      |          |                             |
| <input type="checkbox"/> | Not yet, because ____             |          |                             |
| <input type="checkbox"/> | Which one moves: ____<br>or ____? |          |                             |
| <input type="checkbox"/> | Who decides ____?                 |          |                             |
| <input type="checkbox"/> | In writing, please: ____          |          |                             |

### 5 Before I say it Check a line only when it is true.

- ☐ My words start with a fact I hold: a number, a time or a record
- ☐ Each ask names who decides, and a time
- ☐ I wrote what was said, not why they said it
- ☐ If an AI tool wrote or approved it, I ask the person who decides, not the tool
- ☐ The follow-up message is drafted: what, who decides, by when

### 6 My follow-up in writing What was agreed, who decides, by when.

\_\_\_\_\_

Fictional practice template. Draft for review, not a final product.

## Pushback script sheet

**Fictional example:** case C11, The brief the client's AI rewrote. The client owner is fictional; the client's writing assistant is a fictional AI. Quoted lines are from the case.

Asked by The client owner (fictional) Answer needed by Not stated in the case

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

### 1 What was asked, in their words

The client sends a 'tidied' brief drafted with an AI assistant; it adds a vendor comparison page (2h) that was not in the agreed plan.

### 2 The fact I hold One sentence with a number, a time or a record.

The agreed plan uses 5h of 5h: data 2h, recommendations 2h, handoff 1h. With the comparison:  $2 + 2 + 1 + 2 = 7h$  against 5h.

### 3 What I am missing, and who decides One name for who decides, or Unknown.

Missing Did the client intend the addition? If intended, what should move?

Decides The client owner. Only the client owner can confirm scope.

### 4 My moves Use one to three. Write your words, then ask and stop.

| Use                                 | Move                           | My words                                                                                                  | Their reply, or what the case shows                                                                                                                    |
|-------------------------------------|--------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/>            | Yes, if ____                   | Yes to the comparison page, if you confirm it and its 2h, and tell me what it replaces.                   | Not used here. Nothing has been confirmed yet.                                                                                                         |
| <input checked="" type="checkbox"/> | Not yet, because ____          | Not yet, because the agreed plan is $2 + 2 + 1 = 5h$ of 5h, and the comparison adds 2h: 7h against 5h.    | Case line, to "Can I just build it? It's only two hours.": "Two hours from where? Your plan is already full."                                          |
| <input type="checkbox"/>            | Which one moves: ____ or ____? | With the comparison it is 7h against 5h. Which one moves: the recommendations section, or the comparison? | Not asked here. The case says about this swap: " $2 + 2 + 1 = 5h$ , so it fits, but only once the client owner approves removing the recommendations." |
| <input checked="" type="checkbox"/> | Who decides ____?              | Who can confirm a change to the scope?                                                                    | "I do. A tidied document doesn't change our agreement by itself."                                                                                      |
| <input checked="" type="checkbox"/> | In writing, please: ____       | Did you mean to add the vendor comparison? Please confirm it, or remove it, in writing.                   | "Show me what it changes in the agreed plan, and I'll confirm it or remove it."                                                                        |

### 5 Before I say it Check a line only when it is true.

- ☒ My words start with a fact I hold: a number, a time or a record
- ☐ Each ask names who decides, and a time
- ☒ I wrote what was said, not why they said it
- ☒ If an AI tool wrote or approved it, I ask the person who decides, not the tool
- ☐ The follow-up message is drafted: what, who decides, by when

### 6 My follow-up in writing What was agreed, who decides, by when.

To the client owner: the new brief adds the comparison page (2h), which makes 7h against 5h. Please confirm it or remove it.

If the client owner says the addition was unintended: Confirm in writing that the agreed 5h plan stands and the comparison page is removed.

# 1:1 agenda

One page for a regular 1:1: what is open between you, what changed, who decides, what is at risk, and the one thing you ask for.

## Use it when

- A regular 1:1 with a manager, a client contact or a peer.
- Requests are open and it is not clear who decides.
- Something changed since last time and you want to say it as a fact.

## Skip it when

- The meeting has one topic: use the meeting prep card (template 1).
- You only need to pass on a status. Send a message.

**Time:** About 10 minutes to fill in before, 2 minutes to note what was agreed.

## The two questions it builds on

- 1. What don't I know that someone here does?**  
Sections 1 and 2: the open requests and what changed.
- 2. Who decides this, and what do they need from me first?**  
Sections 3 and 4: who decides, and what is at risk if they do not.

In the room: "What delivery date does my order show?" and "Who can change the order to Friday?" (C10, fictional).

## How to fill it in

- 1. Who and when.** The person, the day and the time in 24-hour form, and how long you have.
- 2. Open requests.** What has been asked and not closed: who asked, how big (hours, files or dates), who decides, and by when.
- 3. What changed.** Facts since last time: a date, an amount, an owner, a record or their exact words.
- 4. Who decides.** Decisions that are waiting. One name or Unknown, and what that person needs from you first.
- 5. What's at risk.** What happens, and by when, if nothing changes. Mark what you know and what you assume.
- 6. One ask.** One sentence: the thing you are asking for and the time. Say the one fact you hold first.
- 7. Agreed.** Fill in after the meeting: what, who owns it, by when. Send it as a message.
- 8. Before I go in.** Check each line only when it is true. An empty box is what to fix first.

## Watch for

- Turning the agenda into a status report. Every line is a request, a change, a decision or a risk.
- Two asks. Pick the one that matters most and put the other on the next agenda.
- Writing why someone did something. Write what was said or shown.
- An assumption written as a fact. Mark it and turn it into a question.

## Swap a vague question for a fact question

| Instead of             | Ask                                                           |
|------------------------|---------------------------------------------------------------|
| Any updates?           | What changed since last time?                                 |
| Just checking in.      | What is open, and who decides?                                |
| Anything blocking you? | What is at risk, by when, and what do you need from me first? |

Also in the pack files (not in this PDF): markdown/07\_one\_to\_one\_agenda.md and csv/one\_to\_one\_agenda\_blank.csv.  
Next page: the blank agenda. Then: a filled example on a fictional case.

## 1:1 agenda

With \_\_\_\_\_ When \_\_\_\_\_ Length \_\_\_\_\_

**Q1** What don't I know that someone here does? Sections 1 and 2.**Q2** Who decides this, and what do they need from me first? Sections 3 and 4.**1** Open requests Asked and not closed.

| Request | Who asked | How big | Who decides | By when |
|---------|-----------|---------|-------------|---------|
|         |           |         |             |         |
|         |           |         |             |         |
|         |           |         |             |         |

**2** What changed since last time Facts, dates, amounts, records or their exact words.

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**3** Who decides One name, or Unknown.

| Decision waiting | Decides (one name) | What they need from me first | By when | Confidence |
|------------------|--------------------|------------------------------|---------|------------|
|                  |                    |                              |         |            |
|                  |                    |                              |         |            |

**4** What's at risk What happens, and by when, if nothing changes.

| At risk | What happens, and by when | I know / I assume |
|---------|---------------------------|-------------------|
|         |                           |                   |
|         |                           |                   |

**5** One ask One thing, with a time.

First, my fact \_\_\_\_\_

I'm asking you for \_\_\_\_\_ by \_\_\_\_\_

**6** Agreed in the meeting

| What was agreed | Owner | By when |
|-----------------|-------|---------|
|                 |       |         |
|                 |       |         |

Fill in after the meeting, then send it as a message.

**7** Before I go in Check a line only when it is true.

- ☐ Every open request has an owner, or says Unknown
- ☐ What changed is facts and quotes, not reasons
- ☐ Each "who decides" has one name (Unknown counts)

- ☐ Each person who decides can be reached in time
- ☐ I ask for one thing

Fictional practice template. Draft for review, not a final product.

1:1 agenda

**Fictional example:** case C10, The vendor's bot said Friday. All names are fictional; the chat agent is a fictional AI.

With The client owner (video call) When Before the Friday launch Length Not stated in the case

**Q1** What don't I know that someone here does? Sections 1 and 2. **Q2** Who decides this, and what do they need from me first? Sections 3 and 4.

1
Open requests
Asked and not closed.

| Request                                         | Who asked           | How big                                      | Who decides                                      | By when |
|-------------------------------------------------|---------------------|----------------------------------------------|--------------------------------------------------|---------|
| Parts delivered by Friday for the client launch | The client's launch | Recorded delivery is Monday: a three-day gap | Priya (vendor account manager) changes the order | Friday  |
| Confirm Friday in the order record              | Me, to Priya        | The order record, Monday to Friday           | Priya                                            | Not set |

2
What changed since last time
Facts, dates, amounts, records or their exact words.

The vendor's chat agent (fictional AI): "Friday delivery is fine."

Priya: "Monday. That's what the order record says."

Priya: "The chat agent can't change orders. What it said isn't on the order."

3
Who decides
One name, or Unknown.

| Decision waiting                                  | Decides (one name) | What they need from me first                          | By when                              | Confidence |
|---------------------------------------------------|--------------------|-------------------------------------------------------|--------------------------------------|------------|
| Whether to hold the launch if parts arrive Monday | The client owner   | The current delivery date: Monday on the order record | Before the Friday launch             | Confirmed  |
| Changing the order to Friday                      | Priya              | A request to confirm Friday in the order record       | Today, if she is reachable (assumed) | Confirmed  |

4
What's at risk
What happens, and by when, if nothing changes.

| At risk                                       | What happens, and by when                                                                     | I know / I assume                                                   |
|-----------------------------------------------|-----------------------------------------------------------------------------------------------|---------------------------------------------------------------------|
| The Friday launch, if the parts arrive Monday | Launch Friday; recorded delivery Monday: a three-day gap until the order record changes.      | I know: the record says Monday. I assume: Priya is reachable today. |
| The client owner's plan                       | The client owner keeps planning a Friday launch without knowing what the order actually says. | I know: the chat agent's "fine" is not on the order.                |

5
One ask
One thing, with a time.

First, my fact The current delivery date is Monday, and Friday isn't confirmed yet.

I'm asking you for Your call: what do you want to do about the launch if delivery stays Monday? by Before Friday

6
Agreed in the meeting

| What was agreed | Owner | By when |
|-----------------|-------|---------|
|                 |       |         |

Filled in after the meeting. The case does not say what the client owner answers, so this example leaves it empty.

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

☒ Every open request has an owner, or says Unknown
☐ Each person who decides can be reached in time

☒ What changed is facts and quotes, not reasons
☒ I ask for one thing

☒ Each "who decides" has one name (Unknown counts)

# 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/06_pushback_script_pack.md                                 | Instructions, script bank, blank sheet (copy it) and the filled example. |
| markdown/07_one_to_one_agenda.md                                    | Instructions, blank agenda (copy it) and the filled example.             |
| csv/pushback_script_bank.csv                                        | The 25 starters: move, situation, script.                                |
| csv/one_to_one_agenda_blank.csv                                     | The agenda as one table: section, item, who, detail, by when, basis.     |
| csv/one_to_one_agenda_example_C10.csv                               | The filled C10 example, fictional.                                       |
| template_pack_v3_addon_A4.pdf,<br>template_pack_v3_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 script bank is landscape and fits both.

## Keep it clean

- Keep confidential details out of anything you share. The pages are for your own preparation.
- Use the scripts on the situation, never as a score or a judgment of a person, and never to win an argument. The person who decides still decides.
- Update the agenda when you learn something. An assumption you have checked becomes a fact; one you have not stays marked.

## Practice the move

The 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 and quoted lines 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.