



Managing for Results

Requests, Offers and Commitments

Charles Feltman

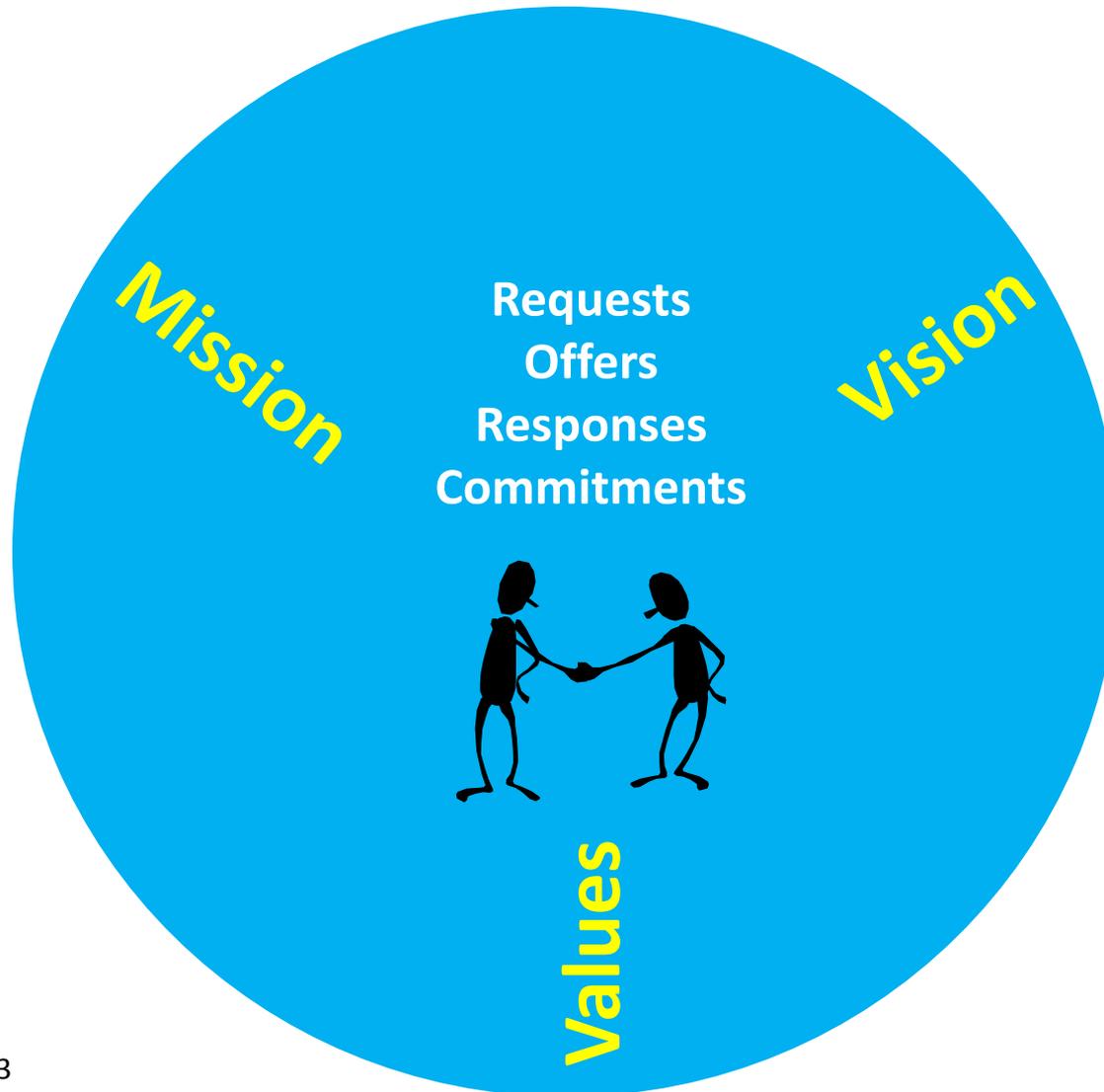


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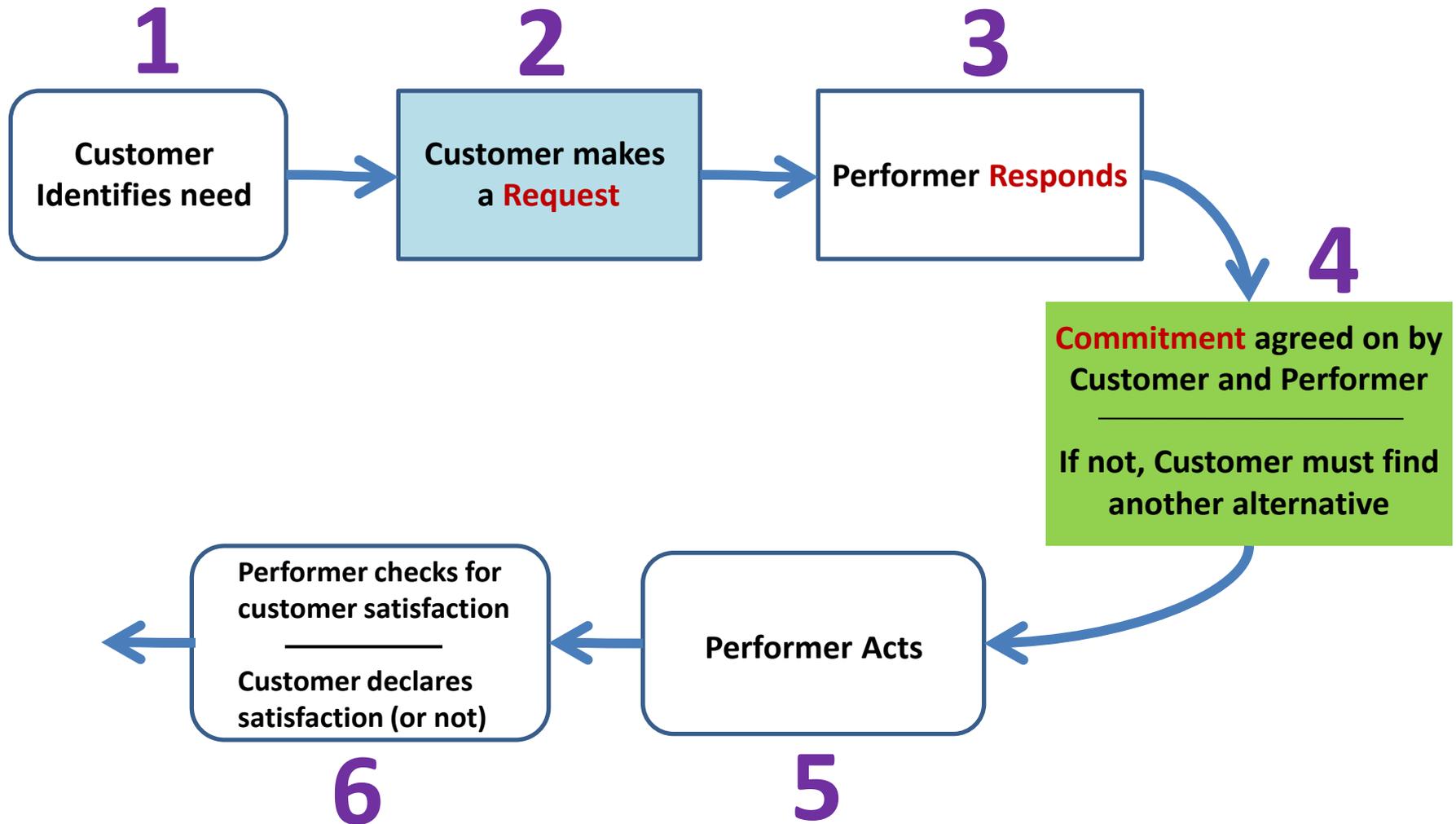
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Conversations for Action



Conversations for Action: Requests, Responses, Commitments



What Is a Request at Work?

It depends on the relationship...

- Command (Direction)
- Request
- Plea





Requests for *Action*

First you make a request,
then work gets done.

Simple, right?

OK, let's try it.

Write out a request.

You can work with a request you plan to make or one you have recently made of someone. Write the request just as you would or did make it to the other person.



Elements of a Complete Request*

- **Customer** – Who is asking? Is he/she committed to the request?
- **Performer** – Who is being asked to perform? Is he/she the right person?
- **Action** – What does the customer want?
- **Conditions of Satisfaction** – How will the customer and performer know the request has been done to the customer's satisfaction?
- **Timeframe** – By when? (“ASAP” is not a timeframe.)

* A number of people have contributed to the understanding of requests, offers and commitments as critical to getting good work done, maintaining trust, and increasing well being. Key among them are Fernando Flores, Terry Winograd, Julio Olalla, Robert Dunham, and Richard LeKander.



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What Does a Request Do?

- Tells the other person what you want
- Allows the other person to determine if, and to what extent, he/she can fulfill your request
- Starts the process leading to a commitment (promise)



More Complete Request = Better Response

How clear am I being?

Direct requests:

- Will you please...?
- I ask that you...
- I request you...

Indirect requests:

- I want/I need...
- Why don't you...?
- ...needs to be done.

Really indirect requests:

- The conference room is a mess.
- It's almost nine o'clock.
- We need to decide what to do about this right away.





Context

- What is the larger shared commitment?
- What is obvious and doesn't need saying?
 - Same as before
- What is NOT obvious and does need saying?
 - New person/people
 - New task or element of task
 - New language (jargon)
 - New context

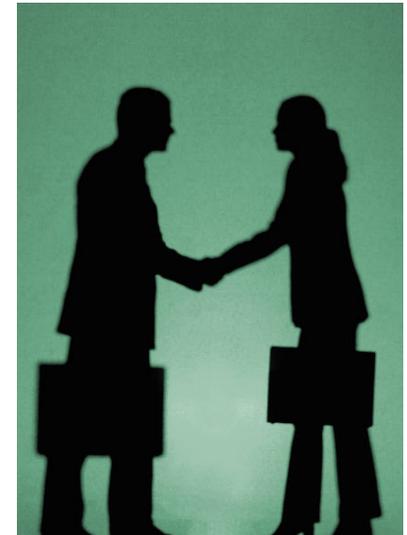


Avoid Making...



Responses to a Request

- **Yes (Commitment)** – “I will do exactly what you asked.”
- **No (Decline)** – “No, I can’t/won’t do what you asked.”
- **Counteroffer** – “I can’t do exactly what you’ve asked, but I can do X.” Sets up a negotiation that results in a specific commitment or decline
- **Commit-to-Commit** – “I need to check before I can commit to what you ask. I will let you know by...”





Commitments

A Commitment Is a Promise to Deliver



Requests and Commitments

Who do you most often make requests of?

What do you ask for?

What kinds of responses to you typically get from each of these people?

Do you get clear commitments from of these people?

Which of those people always or usually fulfill their commitments to you?

Which of those people often fail to fulfill the commitments they make to you?

Who to?	Make complete requests?	Get specific commitments?	Commitments fulfilled?
<i>Ellen</i>	<i>Often leave off due date</i>	<i>Yes or "will try" to in-person requests No resp. to emailed requests</i>	<i>About half the time. Often misses deadline, but I didn't specify. Most unfulfilled sent by email.</i>
<i>Tom</i>	<i>Often leave off due date</i>	<i>Yes or "I'll do what I can" which I think really means "no"</i>	<i>Yes, but have to bug him constantly</i>



Offers

- A complete *offer* will include the same information as a complete *request*
- Performer sets terms
- Customer can negotiate, but the Performer can decline
- Once the Customer accepts an offer it becomes a commitment, or promise, on the part of the Performer

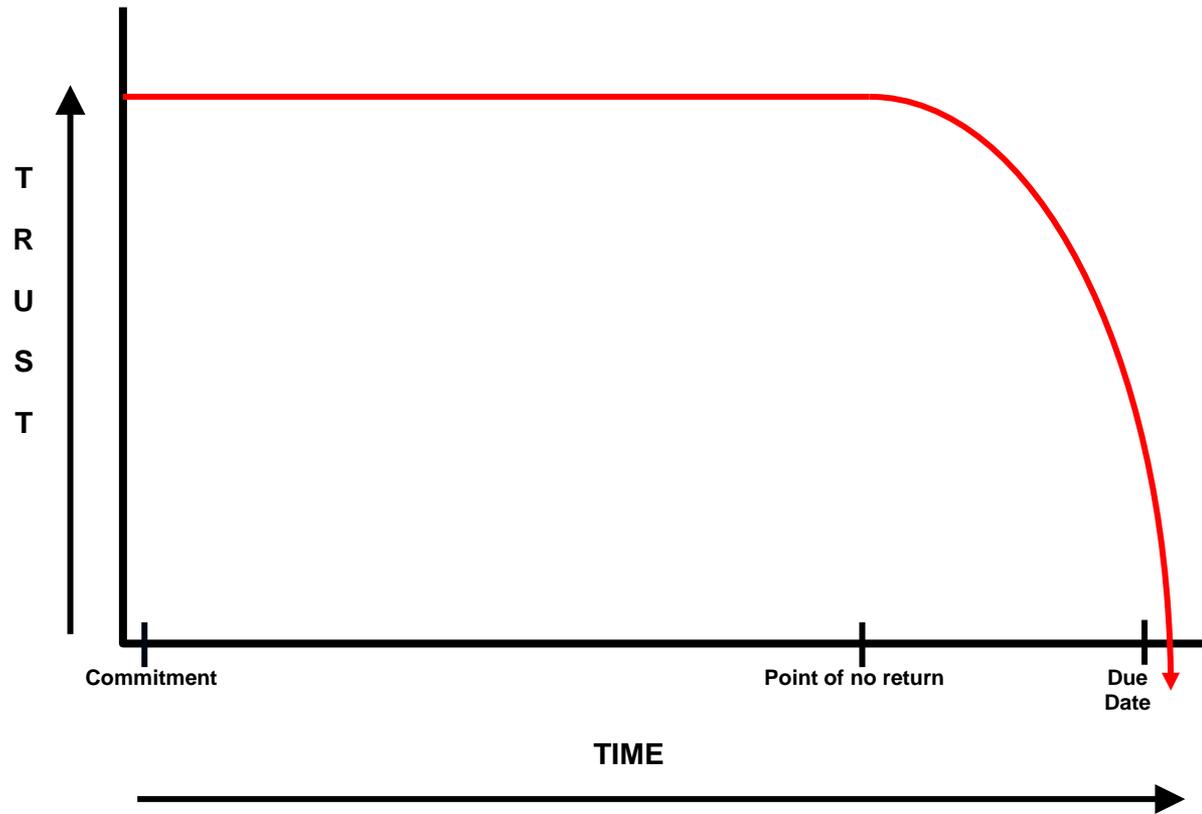
Warning! Don't make an offer you can't fulfill.



Your Responses and Commitments

1. How do you typically respond to requests?
2. Do you ever say no?
3. Do you make counter offers?
4. Do you make clear, specific commitments?
5. Do you tend to overcommit?
6. Do you always or almost always fulfill commitments you make?
7. When you do fail to fulfill commitments, what gets in the way?

Revoking Commitments





Your Outstanding Commitments

Date: Jan. 8				
Who to?	What action?	When due?	Status?	Notes
Ann	Design for new patient intake process	Jan. 15	Incomplete - waiting for input from Ron, Amir, Sonia, due 1/12	Ron starts vacation 1/11
Ann	Justification for overtime request for Amir and Sonia in Feb.	Jan. 10	Incomplete – waiting for Sonia’s input on what she needs	Sonia’s input due yesterday
Gonzalo	Inventory requirements for Feb.	Jan. 10	Incomplete - need to write up and email to Gonzalo	
Tom	Attend new website design meeting	Jan. 10, 2pm	Need to revoke commitment today	Can’t attend due to conflict with Ann’s new staff meeting time
Ron	Approve request to attend 2 day training in Feb.	Jan. 20	Incomplete	Need to check vacation staff schedules



Managing Commitments: Customer

1. Make complete request
2. Get specific commitment
3. Be clear you want to know as soon as possible if there is a problem delivering
4. Cancel request if you no longer need what you asked for



Managing Commitments: Performer

1. Understand exactly what the customer wants: action, CoS, due date
2. Make a clear commitment (or decline)
3. Make requests of others as necessary
4. Revoke and renegotiate if needed
5. Report completion to the Customer

Track your commitments

Make a Complaint



Yes, that's right. Take your pen and paper and write out a complaint you have about something someone didn't do.

Write it as if you are talking directly to the person you have the complaint about or who could do something about the problem.

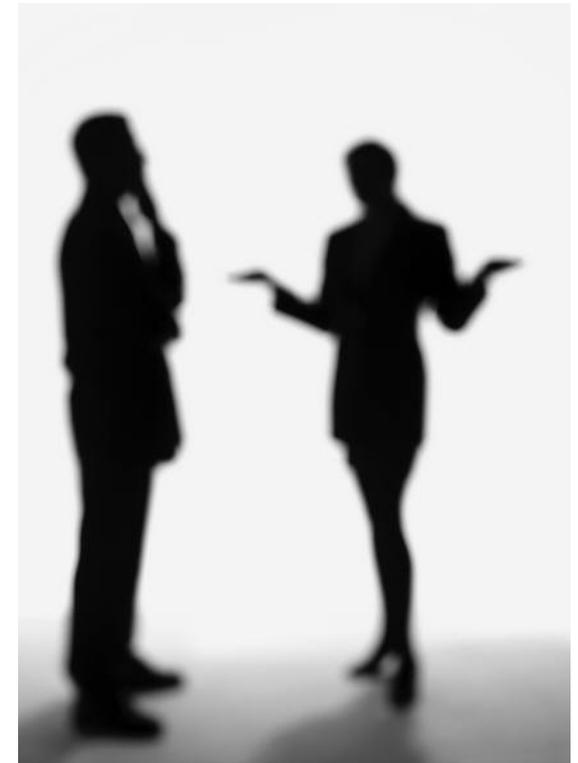
Complaints

Question: What do you do when a commitment isn't fulfilled?

Answer: Make a *complaint for action*.

Two types of complaints:

- Whining – a complaint made to someone *other than* the person who failed to fulfill their commitment.
- Complaint for action – a complaint made directly to the person who failed to fulfill his/her commitment and that includes a request to make things right.

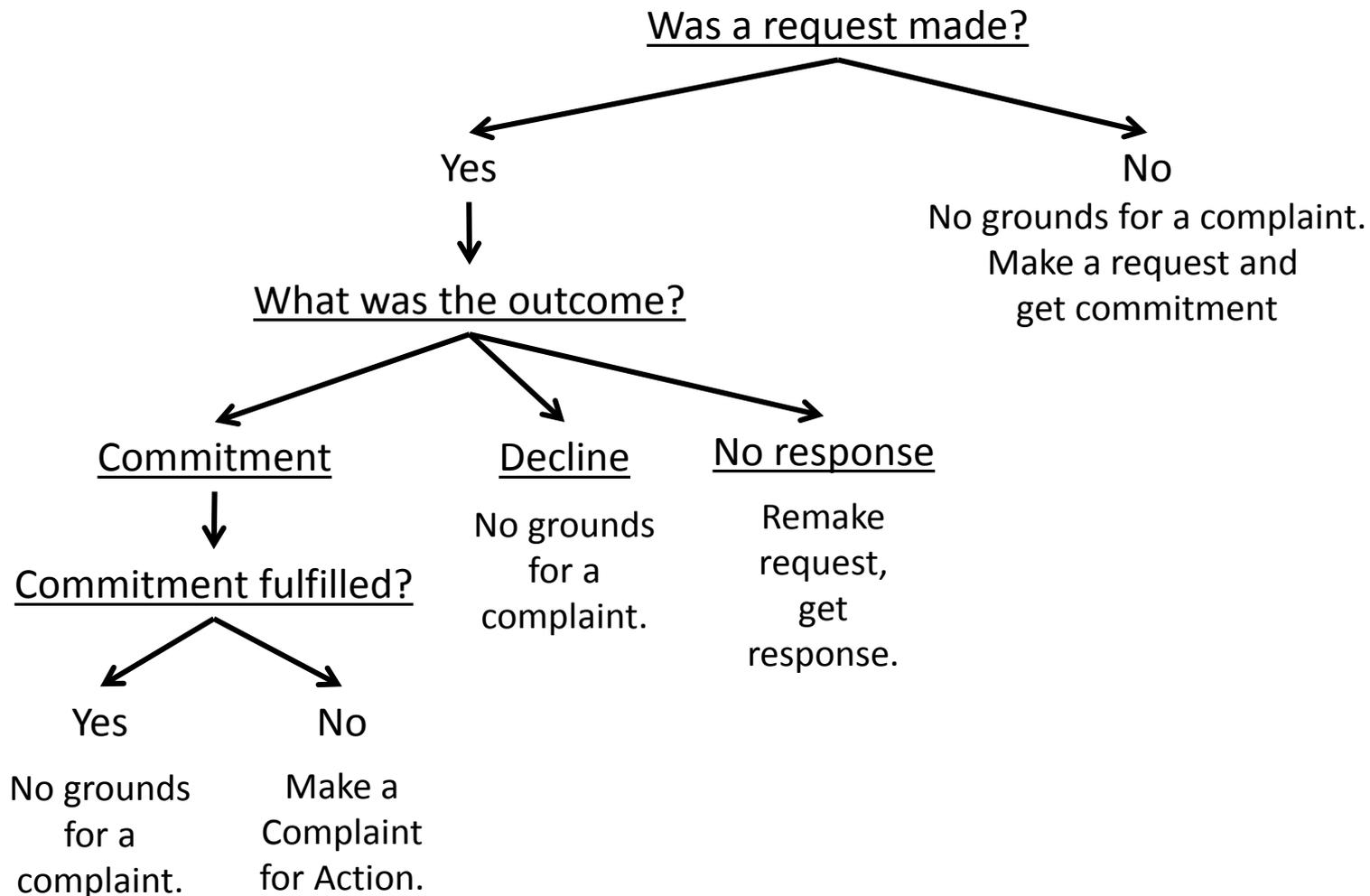




Creating Accountability: Complaint for Action

1. You committed to _____ and did not fulfill that commitment.
2. This has caused some damage to me/us/the team/etc., specifically _____.
3. How do you see this situation?
4. I request that you repair the damage by doing [complete request here].

When to Make a Complaint for Action



Summary

- The basic conversations for action are:
 - Requests and Offers
 - Responses
 - Commitments
- Additional conversations can include:
 - Negotiation in response to a counter offer
 - Revoking and renegotiating a commitment (Performer)
 - Cancelling a request (Customer)
 - Reporting completion (Performer)
 - Declaring satisfaction (Customer)

How effectively you and others you work with manage these conversations has an enormous impact on your success and wellbeing at work. The better you are at it, the greater the likelihood you and your company will achieve your desired results.

Additional Resources

If you have questions about the material presented in this webinar please contact
Charles Feltman

Email cfeltman@insightcoaching.com

Call 805-784-9570

To download a *free* paper on requests, offers and commitments called the Cycle of Commitment go to:

www.insightcoaching.com/insights-other.htm

To purchase *The Thin Book of Trust: An Essential Primer for Building Trust at Work:*

www.thinbook.com/pages/books/trust_book.htm

www.amazon.com

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To discuss further support for building trust, commitment and accountability at your company

Email cfeltman@insightcoaching.com

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