

Focus is about saying “no”
— Steve Jobs

It’s hard to say “no.” Even more challenging is to do it in a way that leaves the requestor happy about being turned down. You may not be able to make them happy- but here are some specific things you can SAY that will help you make the experience more pleasant for everyone.

5 Principles of saying “No” Well

1. Be direct & timely - respond quickly.

Requestors tend to assume that “silence is agreement.”
It helps them to hear “no” quickly. (They will need to make other plans.)

2. Affirm that you’d like to help.

Be positive - let them know you are on their team - you’d help if you could, but you can’t.

3. Give them a reason (no matter what the reason) you can’t help.

This is kind of crazy, but many studies agree that the word “because” is almost magical. If you give them a reason for saying no - even if it’s a terrible reason - people will be far more likely to accept the answer.

4. Offer options (if possible.)

Is there any way you can help? Can you refer them to another person? Another team? Some documentation? Another organization? Helpful articles? Is there any part of their request that would be simple for you to do for them? Can you offer that as an option?

5. Apologize and thank them for asking for your help.

This is about being polite. It’s actually a compliment that they asked for your help. They believe that they need what you’ve got. Sincerely apologize and thank them for asking.

Scenarios - How to say:

- “No” to a meeting
- “No” to a task request
- “No” to a project request from your boss
- “No” to your boss when he tries throwing you under the bus

Say “No” to a meeting

Scenario: You’re invited to a meeting. There’s no published agenda. There’s no stated goal for the meeting, and you’re not sure why you’re on the invitee list. You know from prior experience that this meeting “organizer” is not very organized and you doubt anything productive will come from the meeting.

Give them a call. (Not an email!)

Say “John, I saw your meeting invite. I’d like to help - but I’m not going to be able to make that meeting because my schedule is really tight these days. Can you tell me exactly what you need from me/my team? That way I can see whether we can deliver for you and when we can schedule the work.”

Say “No” to a task assignment

Scenario: A project manager comes to you wanting you to take on additional work, and still hold firm to the project schedule. Your team is the right team for the job, but your schedule is already full. You did think of a couple of options that might work - so you’re going to say no - and offer a couple of options.

“Joe, I’d like to help. Thanks for asking about this. Unfortunately I don’t see any way, given the resources and workload already on our plates, that we can make that happen and still hit the current schedule.

I wish we could make it work, but I don’t think we can.

I’ve given it some thought and wanted to share a couple of ideas.

- *If we delayed X by two weeks, we might be able add this in.*
- *If we got Fred from the XYZ team to backfill Julie, Julie might be able to take that on.*

Would you rather have the date slip on X, do you think that you can get Fred to help, or should we stick with the schedule for now and add this new work to the next phase? What do you recommend?”

Tom Cooper
Principal Geek

Say “No” to a Project Request From Your Boss

Scenario 1 : Your boss wants you to work on a new project - but you're already swamped, and you just can't fit it in. Remember that all relationships are negotiated. This is your opportunity to negotiate.

During an in-person meeting say

“Boss, I thought you wanted me to work on X and then Y. Now we’re talking about making Z my #1 priority. If I do that, I can probably still deliver X and Y on time, but with X there’s a very large risk that the quality won’t be high enough. I’m happy to follow your lead, and I just want to make sure that we’re on the same page. What would you like me to do?”

Scenario2 : Your boss comes to you and asks you to pick up the slack for another team member.

In the moment, respond:

“Boss, let me look into that one and get back to you. If I get back to you in two days, will that work?”

Talking with your team, looking at your to-do list, and considering the company and team goals, you know it's not a good idea. This work would distract you from what's most important and would put goals at risk.

You have a face to face meeting with your boss and say:

“Boss, you know that thing you asked me about the other day? I took some time to look into what it would take to make it happen, and it's not good news. I wish that there was some way we could help. Unfortunately we can't take that on because the team is already booked on Project X and Project Y which are on the corporate goals list for this quarter. If we step in to that one, either X or Y will have to slip. What do you recommend?”

Say “No” When Your Boss Throws You Under The Bus

Scenario: Your boss comes to you and tells you that he needs you to take bad news to his boss (or his peer.) This would be bad for your career, and he is only asking you because he doesn't want to face the consequences personally. You're in a trap, and you know it.

In a face-to-face meeting with your boss:

“Boss, I know you want me to tell [your boss' peer] that we think his idea is idiotic completely impossible. At my level in the organization, I'm not sure that he will hear that message from me. I think that if we go together we will have more of a chance of success. Can we get your boss to be in the meeting, too?”

Best case: your boss agrees.

Worst case, he throws you under the bus and refuses to help.

Tom Cooper
Principal Geek

Here’s how you tackle that one.

Go to the meeting with the senior executive. Be polite, and say

“Sir, I know that you asked us to work on project X, with the goal of finishing that this quarter. I’ve spoken with John (my boss) about it and as we ran through several scenarios neither of us could find a way, based on current project load and priorities, to fit your project in this quarter. Unless we can delay current projects or increase resources, we just can’t make that work.”

After the meeting, send an email to the senior exec, copying all of the participants, and copying your boss. The email says:

“This is an email followup to the conversation we had in the planning meeting today. I wish that there was a way that we could help. As I mentioned there, because of our current project workload and resources, John and I could not find a way to deliver your project this quarter. If priorities or resources change, we would be happy to re-evaluate your project and talk about dates. Thank you for asking for our help, and thank you for your patience.”

This way, you’ve offered to consider his request - but only if resources change - and you’ve made sure that the executive knows you’re not off on your own. You’ve discussed the matter in detail with your boss, and presumably, your boss agrees with your position. Plus, it’s a good idea to have a written record.

It’s possible that this can go south if your boss is really out to get you, (if that’s the case you’d better find a new boss!) but most of the time this will allow you to wriggle out from under that bus.