Making Effective Requests

A Cheat Sheet

Ready to get more reliable results in your work and relationships? This cheat sheet is for you.

The gold at the end of the rainbow is a checklist called "Five Elements of An Effective Request." You can put that to use today. But before we get there, let's have a look at the big picture.

Learn the Vocabulary of Action

The workplace is filled with smart people with good intentions who are working hard. Then why does important work often get delivered late and/or fall short of the promise?

The answer to this question may not be simple, but it doesn't have to be mysterious. What we're discussing is how people coordinate action—how through conversation (talking with each other) we negotiate commitments, follow through, touch base, renegotiate, and assess results. There is a language for this just as specific and relevant to action as the languages of medicine, engineering, and carpentry are to those disciplines. If you don't understand this vocabulary and how it functions, life remains a never-ending series of dropped balls. Once you *see* this vocabulary and *use* it, you gain a superpower: the ability to transform yesterday's incompletions into tomorrow's reliable results.

I've written a guide that goes through this in great detail. It's all about the "action conversation," my term for the nitty gritty back-and-forth between two people trying to coordinate action with each other. The action conversation happens so fast and so often that for all practical purposes it's invisible to you. Think of it as

one of those taken-for-granted aspects of life that you only notice when it breaks down, like the tires on your car or the faucet in your kitchen.

My guide describes the four phases of the action conversation and the key actions and common breakdowns within each phase. Although this framework informs my work with leadership teams, it's so comprehensive in scope and microscopic in detail that I only share it with folks *really* interested in going deep. For everyone else, I like to introduce the vocabulary of the action conversation in small chunks you can use right away.

One of the most universal of these is the request.

The Requests You Make

The word *request* sounds formal, like it comes from a 19th century novel of high society manners. But I'm using it more broadly. Requests are actions you take dozens of times every day. Whenever you ask someone to bring about a particular result by a specific timeframe, you are making a request. Consider:

- Calling a nearby Thai restaurant to order Green Chicken Curry take-out
- Sending an email to a colleague asking for feedback on an article you've written
- Asking your 70-year-old mother over Zoom to wear a mask whenever she is in public because of Covid-19
- Pleading to your kids to stop throwing metal objects at each other's heads
- Emailing an invoice to a client

These are all requests. You make dozens of them every day. Most of the time without much thought. As I said, they are invisible to you.

One cool thing about requests is that there are many ways to make them, and each of us has a habitual approach. Yours reflects your personality, temperament, culture, and numerous other factors. I don't want to persuade you to abandon your *style*. It's part of your DNA. But I do want you to elevate the *quality* of your requests so you get the results you want more consistently and with less blood, sweat and tears.

What does it take to improve the quality of requests? What makes some requests effective and others ineffective?

That's the focus of the checklist I'll share.

But, first, let's define our terms.

Terminology for Coordinating Action

Promise: a commitment between two people that

> (a) One person will bring about a particular result (What) by a specific timeframe (When) and
>
> (b) If What happens by When, the other person will be satisfied.
>
> *Example: I commit to appear on your podcast next Thursday from noon to 1pm prepared to discuss the Enneagram system of development and its use in leadership teams. You commit to being satisfied if I do this.*

Performer: the person who commits to doing What by When

Customer: the person who commits to being satisfied if What happens by When

> *In this example, I am the performer, and you are the customer*

Offer and Request: the two ways a promise can get initiated. Either the performer makes an offer or the customer makes a request. Without an offer or request, there can be no promise.

> *If I don't offer to be on your podcast and you don't request this, there's no way for us to get to a promise (and no chance we'll chat on your show).*

Offer: a conditional promise made by one person (the performer). When the performer makes an offer to the customer, they commit to bringing about What by When *if the customer accepts*.

In this scenario, I initiate things by offering to come onto your podcast. I've made an offer. If you accept my offer, we have a promise.

Offer + Acceptance = Promise. Just because one person has made an offer doesn't mean there is a promise. The other person has to accept!

If I offer to be on your podcast and you say no, ignore me, or give a fuzzy response, there is no promise.

Request: a commitment by one person (the customer) to be satisfied if the other person (the performer) brings about What by When.

In this alternative scenario, you initiate things by requesting that I come onto your podcast. If I accept, we have a promise.

Request + Acceptance = Promise. Once again, just because one person has made a request doesn't mean there is a promise. The other person needs to accept!

If you ask me to be on your podcast and I say no, ignore you, or give a fuzzy response, there is no promise.

OK, there's our terminology.

Now onto the checklist you've been waiting for.

Five Elements of An Effective Request

1. **Clear conditions for satisfaction ("What").** This refers to the results that the performer creates, not how she brings them about. An effective request clearly describes what results are needed to satisfy the customer. This provides an agreed standard that the customer can later use to declare whether or not she is satisfied.
2. **Made to a specific person.** The audience cannot be either a nameless group of people or the abyss. It needs to be a specific person so she knows to respond.
3. **Made from a specific person.** Saying that "we'd like you to do X" doesn't tell the other person who they can approach to ask clarifying questions, renegotiate, or report completion. "We" is too vague. To be effective, a request must come from a specific person.
4. **Clear time frame ("When").** What is the time and date by which the performer will bring about these conditions for satisfaction?
5. **Shared understanding of what words mean.** What's obvious to one person may not be obvious to the other. For example, if you're asking someone to "meet me in the courtyard" or "send me that file," it's important that the other person know which courtyard or file you mean. Otherwise, you won't get what you want.

In the final section below, I describe how to use this checklist.

How to Use This Checklist

This checklist comes in handy in two broad situations: requests you make of others and requests others make of you

For requests you make of others, use this checklist to:

- **Reflect on recent requests you've made.** Start by looking at emails and meeting notes because these are more reliable than memory of verbal exchanges. In each instance, which elements did you include and which did you omit? What patterns do you notice across the range of requests?
- **Prepare future requests so you knock them out of the ballpark.** When using email, pause before hitting Send and use this checklist to see what you accidentally left out—and then fill in the gaps. When preparing for a one-on-one meeting, put important requests in writing (talking points) and before you walk into the room (or Zoom), make sure you've covered your bases.

For requests others make of you, use this checklist to

- **Reflect on recent requests you've received**. As above, start with written requests. For each one, what was included and omitted? What patterns do you notice for particular people, like a customer who is clear on What but vague about When, your boss who provides clear What and When but sends it vaguely to her whole team, or a direct report who frequently uses words you don't understand? One skill you can practice in all of these situations is *asking clarifying questions* about any omitted elements. "Excuse me, I heard that you want [yada yada] but didn't catch the timeframe. What date would you like this by?"
- **Prepare to respond to future requests**. When someone makes a request to you (verbally or in writing), one useful question to have in the back of your mind is "Are they making a request of me?" If you're not sure, ask. If they are, pay attention to what items in the checklist are present and absent. Don't respond to requests you don't understand. Instead, ask clarifying questions to fill in the gaps.