

Resource Sheet for Overcoming a No: 5 Keys to Escalating Effectively

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These questions and guidelines can help you think through how to unblock yourself and enlist help when you're faced with a roadblock.

1. Are they on your team?

- Who do you need support from to make your project successful? What needs to get done, who will do it, and by when do you need it?
- Do you truly have commitment from the people or teams you are relying on for support?

2. Find common ground

- Do you know your counterparts' goals and motivations? Can you find a common goal?
- Do you have data or customer insights you can share with your counterparts?
- Are there ways you can help break through resource constraints? For example, can your team take on some of the work?

3. Make the case

- Is it time to escalate to your leadership? Do you need help clarifying priorities?
- Frame the situation and the decision: present a fair assessment of the benefits, risks, trade-offs, and your recommendation. Share supporting data and research.
- Practice making the case. Work with a colleague to role-play the conversation, anticipate questions, and prepare your answers.

4. Don't burn bridges

- Are you keeping your counterparts informed as you make your case and escalate?
- Would your counterparts agree with how you're framing the decision to be made, and with the assumptions you're making?

5. Keep the long game in mind

- What are the lessons you're taking from this situation and your approach? How might you incorporate those lessons into current and future projects?
- Are there opportunities to improve your working relationships with your counterparts or other leaders in the organization?

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