

## When and How to Say No

By Ed O'Neil, Principal, O'Neil & Associates

When Sally Lee began her career, she got some advice: Be positive and affirm people, ideas, and opportunities when they came her way. Her mentor suggested that she bring a professionally critical judgment to these decisions, but on the whole, say “yes.” This served her well — she took on assignments when they were offered, worked to expand and use her network, and saw her career advance sooner than most of her contemporaries.

Soon she was being asked to play leadership roles within her organization — first in informal ways, then increasingly as the designated person in charge. Her opinions were also sought for other endeavors that she was not directly involved with, and this made her feel that her leadership was recognized throughout the company. Now her plate was more than full, but the invitations kept coming. She found herself in situations where she felt obligated to lend a hand or taking on a leadership role because it was for someone who had helped her on the way up. She possessed a keen sense of “paying it forward” and wanted to do favors for those from whom one day she might need something in return. Her network kept growing and she was being asked to give national talks addressing her work. She was gratified by the recognition of her contributions and success.

Eventually, she found herself in a major leadership role with six direct reports, and began to feel the stress of leading her team. She was drowning, but sadly had never learned the magic word that could rescue her: no.

## Strategies for Saying No

A big part of leadership is affirming things in a positive way that motivates others to engage and push forward. But if leaders are not careful, they can get trapped in a miasma of commitments and not have the time or energy necessary to advance their own leadership agenda. Here are some suggestions for when and how to say “No.”

1. **Understand your psychological needs**, and make sure that you are not just saying “yes” in order to be liked and accepted by others. Good relationships are important, but should not be bought by always saying yes. If your hidden motivation is to be a pleaser, recognize this and realize that you cannot be a competent leader and say “yes” to everything and please everyone.
2. **Be clear about your leadership agenda**, both strategically and tactically. How does what you are being asked to do fit with your short- or long-term goals? If it fits and clearly advances your agenda, then say yes. If it “sort of” fits, but others will do the work, let them. If it does not fit, see the “ready to trade” section below.
3. **Be ready to trade**. Sometimes you need to do something because the person you work for asked you to. Your job is being loyal and supportive, so do it. If it is consistently off your overall aim, do it for a few times, then sit down and ask for help in understanding how what you are doing fits with the bigger picture that they see. Be willing to offer why you think it does not, but listen first. Sometimes you have to do things in a purely quid pro quo manner: “I want that from you, so I will do this for you.” Just be conscious of when you are in an exchange, and do not fool yourself into thinking that if you get nothing in return, you are saving up future favors—you are not.

### Leadership Tips

*Leadership Tips* is an ongoing series produced by the Center for Health Care Strategies' Medicaid Leadership Institute in collaboration with O'Neil & Associates. The series is designed to provide general guidance to help leadership of state agencies and their senior managers develop and refine the skills and expertise necessary to successfully lead their state programs. To view the full series, visit [www.chcs.org/leadership-tips](http://www.chcs.org/leadership-tips).



4. **Be sure you know what they are asking.** Sometimes all a person really wants is to share an idea, or maybe even get tacit support for an undertaking. They often really do not need more than that; but, if you make a commitment to them, they will likely come back and ask for more. This should be combined with setting clear boundaries regarding what you can and cannot do.
5. **Affirm when saying no and give reasons why.** You do not have to say yes to send an affirmative message about an idea or proposal. “That is a really great idea. Thank you for sharing and I hope you will keep me updated.” This kind of a statement is a great lead in to: “I am really focused on my current work and do not have any extra time or energy just now, beyond learning about your project.” I also like: “I am really honored that you asked, it means a great deal to me, but my current commitments will just not allow the time to do this justice.” Practicing a few standard ways of responding will make it easier to say no.
6. **Be direct and don’t delay.** Most of us know right away if what we are being asked to do will advance our work. Thinking about it does not usually improve your understanding; it only provides more time for the guilt or desire to please to work their way back into your decision. Pull the trigger and give a polite, but firm, “no.” If you must delay, set the timer with a phrase like, “I will let you know tomorrow.”
7. **Remember the rest of your life.** Many times, the extra things you say yes to will come at the expense of your ability to balance your life and work. Keep pictures of those in your life that will actually pay much of the cost of your saying “yes” without fully thinking. Take a look and see if that extra trip to talk at a conference is really worth missing back-to-school night, soccer playoffs, or anniversaries.
8. **Pass it on.** If it really has value and needs to be done, think about passing it on to one of your direct reports. This is really effective if you have worked with them to create a development plan, and what is being requested of you is something they would like to have the chance to grow into. If it is not really important or does not really fit, do not pass it — end it.
9. **Remember to celebrate when you say no.** This is not a loss of an opportunity; this is a liberation from a burden that will let you focus on critical work, prioritize important parts of your career that get short shrift, and have time to balance your life. So, count them up and give a cheer.

Saying no is not a defeat. It is you keeping your eye on the prize and moving forward in the right way.

## About Ed O’Neil

Ed O’Neil, PhD, MPA, is the owner of O’Neil & Associates, a management consulting and leadership development firm focused on change and renewal in the health care system. He was previously professor in the Departments of Family and Community Medicine, Preventive and Restorative Dental Sciences, and Social and Behavioral Sciences (School of Nursing) at the University of California, San Francisco (UCSF). At UCSF, he served as the director of the Center for the Health Professions, a research, advocacy, and training institute that he created in 1992. His work over the past three decades has focused on changing the US health care system through improved policy and leadership. To learn more, visit [www.oneil-and-associates.com](http://www.oneil-and-associates.com); contact Ed O’Neil at [herringoneil@gmail.com](mailto:herringoneil@gmail.com).

## About the Medicaid Leadership Institute

The *Medicaid Leadership Institute*, an initiative of the Robert Wood Johnson Foundation led by the Center for Health Care Strategies, helps Medicaid directors develop the skills and expertise necessary to successfully lead their state programs in an ever-changing policy environment. In addition, CHCS *Medicaid Academies* provide policy and leadership training for senior Medicaid staff as well as colleagues across partnering state and county agencies. Ed O’Neil has advised numerous MLI Fellows and Medicaid senior managers over the past decade. To learn more, visit [www.chcs.org/medicaid-leaders](http://www.chcs.org/medicaid-leaders).

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