THE 5-STEP STRATEGIC PUSHBACK FRAMWORK

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Introduction

Purpose:
This playbook helps L&D and enablement professionals reclaim their strategic seat at the table. Rather than saying yes to every request, you'll now be armed with the questions, insights, and structure to redirect misaligned asks into impactful, measurable outcomes.

Why it Matters:
Too often, Learning & Development teams are treated like order takers: "Just make a course." "We need a webinar." "Throw this into the LMS."
But when L&D operates this way, it reinforces a dangerous narrative — that training is a checkbox, not a lever for business outcomes.
This guide is designed to change that.

Using this playbook will help you:

- Prevent wasteful, ineffective training projects
- Build credibility with stakeholders across the business
- Deliver learning that actually drives behavior change and ROI

How to Use This Guide

1. **Use It Live:** Bring this to stakeholder meetings and fill it in during discovery conversations.
2. **Make It Collaborative:** Turn it into a shared doc to co-design better solutions with your partners.
3. **Adapt It:** Each section is editable, tailor the prompts and language to fit your organization's voice.
4. **Archive & Track:** Save completed versions to build a library of successful (and unsuccessful) pushbacks — they'll become your case studies.
5. **Share It Across Teams:** Empower your team and peers with a consistent model for handling vague or misaligned requests.

📌 **Save this. Bookmark it. Share it with your team.**

Step 1: Clarify the Request

Goal:
Understand the real reason behind the training ask.

Ask:

- "What prompted this request?"
- "What behavior or outcome are you hoping to change?"
- "How are people doing this today?"
- "What happens if we don't build anything at all?"

Your Notes:
- Request received: ____
- What they think the problem is: ________________________________
- What behavior is actually impacted: _____________________________

Step 2: Diagnose the Root Cause

Objective:
Goal:
Determine if training is the real answer or if there's a deeper process, access, or awareness issue.

Use Heidi's "3-Data-Point" Rule:
- What exit interviews, engagement surveys, or support tickets say
- What leadership or team managers report
- What anecdotal or usage data reveals (e.g., LMS login gaps, customer complaints)

Your Data Points
- ____
- ____
- ____

Step 3: Propose a Smarter Solution

Goal:
Offer an alternative that solves the real problem and explain why it works better.

Tips:
- Avoid vague concepts. Use concrete examples (e.g., show a knowledge base layout or existing microvideo)
- Don't pitch and run, invite discussion.
- Frame your solution in terms of efficiency, just-in-time usefulness, and impact

Suggested Solution
- Format: ________________________
- Why it's better: ____
- Potential trade-offs or limitations: ___________________________________

Step 4: Frame the Business Value

Goal:
Translate your suggestion into terms that resonate with non-L&D stakeholders.

Use the cheat codes:
- "This saves time for frontline teams by…"
- "It reduces IT help tickets by…"
- "It ensures new hires get faster to value by…"

Your Value Statement
- Our approach will save ______ hours/month or reduce ______ incidents
- This supports business goal: _______________________________________

Step 5: Gain Buy-In or Escalate

Goal:
Collaborate, don't confront — but know when to walk away.

If they push back:
- Invite them into a quick co-creation session ("Let's sketch this out together…")
- Use examples to bridge the gap ("Here's a similar project we did with [X team]…")
- If they insist on the wrong solution, document your concern and move on — or prepare for a longer-term strategy shift.

Next Action
- Schedule sync with: __________________________
- Prototype or asset to show: ____________________
- Stakeholders to align with: _____________________