Pivot Point

Facilitation guide · team, one facilitator

What this is: a short facilitated session you run at the *start* of a plan — while everyone is still clear-headed and not yet invested — to decide in advance what would tell you to change course. The team sets a concrete trigger ("if X happens, or by date Y we haven't seen Z, we change course") so that later, when it fires, they change without re-arguing whether it counts. It takes about 20–30 minutes. Your job is to keep the trigger specific enough to fire without debate — and, later, to hold the team to it.

The one line to hold: you can't decide when to quit a plan while you're inside it — so decide before you start. By the time a plan is clearly failing, everyone's already invested, and every reason to keep going feels compelling. The trigger is set now, while the team can still see the plan clearly. **Set the trigger before you're attached.**

· WHEN DO I USE THIS?

Use this when

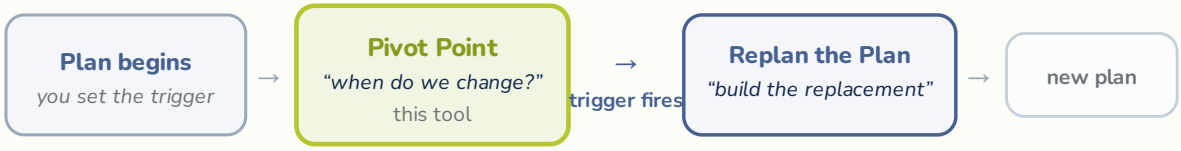
GOOD FIT

The start of a plan, or initiative, that could fail slowly — especially one you'll be tempted to stick with too long. A team that has said "we're almost there" too many times before. Any commitment where the decision to change will be emotional once everyone is invested. Set the trigger while you can still see the plan clearly.

WRONG TOOL

The plan is already dead and you need to rebuild › Replan the Plan. You need to decide whether to proceed right now › Go/No-Go Card. This tool is for setting the trigger in advance, before you're attached — not for making the call in the heat of the moment.

THE CHANGE-TRACK SEQUENCE



Pivot Point decides *whether* the plan survives. Replan the Plan assumes it is already dead.

You can't decide when to quit a plan while you're inside it — so decide before you start.

Set the trigger before you're attached, while you can still see the plan clearly.

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PART 1 RUNNING THE SESSION

team, one facilitator

1 · WHAT IS THIS REALLY DOING?

The one idea

By the time a plan is clearly failing, the team is the worst-placed group to call it — they've already invested time, budget and credibility, so stopping feels like waste and every reason to continue feels compelling. The decision can't be made well in that moment. So it's made *now*, at the start, when no one is yet attached. The team is protecting future-you from present-you: a calmer, clearer-headed version of the team makes tomorrow's hardest decision today — and later, the team in the moment only has to follow it.

WHO MAKES THE CALL — AND WHEN

CLEAR-HEADED YOU

at the start — not yet invested

sets the trigger — can see the plan clearly, decides well

makes the decision

INVESTED YOU

in the moment — "too far in to stop"

every reason to continue feels compelling — can't call it well

only has to honour it

2 · WHAT DO I NEED?

What you'll need

A plan early enough to change (core)	A plan or initiative early enough that change is still possible — and that the team isn't yet invested in. The trigger has to be set before attachment, not after.
A clear, observable change trigger (core)	The specific event, or missed result, that would genuinely mean it's time to change course. Not only failure — this protects good plans from being dropped on a bad day, too.
A date or an event to bind it to	Event-based ("if X happens") or date-based ("by Y we haven't seen Z"), or both. Concrete enough to fire without debate.
One facilitator	Keeps the trigger specific, records the final commitment on the capture sheet, and — later — holds the team to it when it fires.

Resilience · Change Track · about 20–30 minutes, set at the start of a plan.

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3 · HOW DO I RUN IT?

The run-sheet

Brief the team, then run these in order. The bold part is what you say or do; the move under it is where you add the most. The whole session depends on Step 4: a trigger that isn't specific enough to fire without argument is no trigger at all.

1. Name the plan and what it depends on	**4 min**	*"What's the plan, and what has to be true for it to be worth continuing?"* Confirm the goal first — agree what success looks like before you discuss when to change course.
2. Name the change trigger	**6 min**	*Before anyone imagines the project failing, ask: "what specific event, or missing result, would genuinely mean it's time to change?"* Say it plainly now, before anyone's attached. This is easy today and almost impossible later.
3. Write it as a trigger	**6 min**	*"If X happens, or by date Y we haven't seen Z, we change course."* Turn the condition into one concrete line. Event-based, date-based, or both.
4. Pressure-test it	**5 min**	*Ask:* ***"If this happened tomorrow, could we still argue our way past it?"*** If yes, it's too vague — tighten it until the team in the moment couldn't explain it away.
5. Commit and set the check	**4 min**	*Record the trigger, record who will review it and on what date or milestone, and note where it will be kept visible (project charter, sprint board, team workspace).* When it fires, the team changes — no re-arguing.

> **THE PRESSURE-TEST IS THE WHOLE SESSION — MAKE IT UNARGUABLE**
>
> A vague trigger ("if things aren't going well") is worse than none, because it gives the team in the moment room to argue. The test is simple: **imagine the trigger firing tomorrow, and ask whether the team could still talk its way past it.** "We're close." "It's just this one thing." "Let's give it one more sprint." If any of those could work, the trigger isn't specific enough. Push for a concrete event or a dated result — something that, when it happens, simply *is* true, with nothing left to interpret. A trigger that can be argued away will be argued away, at exactly the moment it matters most.

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PART 2 GETTING IT RIGHT

why it works & common mistakes

4 · WHY DOES THIS WORK?

Why it works

Once a team has invested time, money and credibility, stopping feels like failure — even when the evidence says otherwise. Setting the trigger before anyone is attached lets a clearer-headed version of the team make the decision. And a concrete trigger leaves nothing to reinterpret when it fires: when it simply *is* true or not, "does this really count?" has nowhere to go.

> **TRUST THE TRIGGER — THAT'S THE WHOLE POINT**
>
> When the trigger fires, the team changes course — without re-opening whether it really counts. This feels wrong in the moment: the team in the moment will want to renegotiate, because they're invested. But the decision was already made, deliberately, by a clearer-headed version of the team who could see the plan without attachment. Re-arguing it now just hands the call back to the version of the team you set out to protect against. The trigger firing is not a failure of the plan — it's the tool working exactly as designed.

5 · WHAT IF IT GOES WRONG?

Common mistakes

What happened	The fix
The trigger was set after the team was invested	Too late — attachment has already compromised the call. Set it at the start; if you've missed that window, name it honestly and set the tightest trigger you still can.
The trigger was vague ("if it's not working")	Vague lines get argued away. Push for a concrete event or a dated result — pressure-test it until it can't be talked past.
The team framed it only around failure	The trigger also protects a good plan from being dropped on a bad day. Frame it as "time to change course," not just "time to admit failure."
The trigger depended on opinion, not evidence	A subjective trigger is a vague one in disguise. Rewrite it so anyone can tell whether it has fired without interpretation — observable, not a judgement call.
The trigger fired and the team re-argued it	That hands the decision back to the team in the moment — the exact thing you set out to prevent. Hold the line: the trigger fired, so the plan changes.
No one owned the check	A trigger no one reviews never fires. Record who checks it, and on what date or milestone, before the session ends.

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Before you close the session

- ✓ The trigger was set while the team was still clear-headed, not yet invested
- ✓ It's concrete — a specific event or a dated result, not "if it's not working"
- ✓ It survived the pressure-test: the team couldn't argue their way past it
- ✓ Someone owns the check, with a date or milestone — and the team has agreed to honour it when it fires

6 · HOW DO I MAKE THIS STICK?

Take it back to work

THE HABIT

Before you start anything you might be tempted to stick with too long, ask:

"What would have to happen for us to change course — and can we name it now, before we're attached?"

The moment to decide when to quit is always before you've invested. Name the trigger while you can still see clearly, and let that version of you protect the version who'll be too far in to call it.

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Appendix · Reference

You should not need this to start. Read it before, or if a run goes sideways.

7 · A WORKED RUN

Watch the facilitator move

The plan: “a new product build, six months, betting on landing a first paying customer.”

Stage	What happened
Name the trigger	At kickoff, clear-headed: “what would tell us this isn’t working?” The team lands on two things — no paying customer by end of Q2, and the core integration slipping twice.
Write it	“If the integration slips a second time, or by end of Q2 we haven’t landed a paying customer, we stop and rethink.”
Pressure-test	“If that happened tomorrow, could we argue our way past it?” Nearly — “a paying customer” was fuzzy. They tighten it: signed contract, money received. Now it can’t be talked past.
It fires	Three months later the integration slips a second time. The trigger has fired. There’s a pull to renegotiate — “we’re so close” — but the decision was already made. The team never debates whether the trigger counts — they only decide what happens next, and hand off to Replan the Plan.

The call that would have taken an agonising, emotional meeting three months in was made calmly, in ten minutes, before anyone was attached — and it held because it was specific.

· WHERE DOES THIS FIT?

Where this sits in the Gym

The real need	Use this
Decide in advance when to change course	**This tool — Pivot Point.** Sets the trigger for later. “When do we change?”
The plan is already dead — rebuild it	**Replan the Plan** — the next stage. Pivot Point fires the decision; Replan builds the replacement. “How do we rebuild?”
Decide whether to proceed right now	**Go/No-Go Card** — a decision in the present, not a trigger set for later.

The move underneath: the hardest decisions get harder the more you’ve invested — so make them before you’re invested. Name the trigger while you can still see clearly, write it concretely enough that it can’t be argued away, and let a calmer version of the team make tomorrow’s call today. That is the whole of Pivot Point: protect future-you from present-you.

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