WORKSHEET + WORKED EXAMPLE

Know When to Bring in Expertise

A boundary around what you know, what you are assuming, and whose expertise belongs in the decision.

10-15 minutes | Circle of competence reflection

Use it in three moves

1. Describe what your relevant experience actually covers.
2. Mark the edge without turning it into a permanent limit on learning.
3. Bring in the expertise needed for the decision and name what can responsibly happen now.

What are you being asked to judge?

Keep the scope narrow enough to examine.

What do you understand from relevant experience?

Name the experience and its limits.

Where does your experience become thin?

A familiar word can conceal an unfamiliar domain.

Know When to Bring in Expertise

YOUR WORKING NOTES / CONTINUED

What are you currently taking on trust?

Include vendor claims and secondhand reassurance.

Who should help, and what should they examine?

Invite people with practical and lived experience as well as formal expertise.

What decision can you make now, and what must wait?

Separate a small trial from a broad commitment.

A question for me

What would make it easier for someone to tell me I am outside my depth?

See one way through

FICTIONAL WORKED EXAMPLE / NOT THE ANSWER TO YOUR SITUATION

What are you being asked to judge?

Whether a new scheduling tool will work for the volunteer team.

What do you understand from relevant experience?

I know our scheduling process and the problems volunteers report.

Where does your experience become thin?

I have not assessed the tool's accessibility or how account recovery works.

What are you currently taking on trust?

The demo presenter said it works for everyone and takes minutes to set up.

Who should help, and what should they examine?

Ask an accessibility specialist and volunteers using different devices to test the core tasks.

What decision can you make now, and what must wait?

Agree a limited evaluation. Do not commit the team until access, support, and privacy questions are checked.

The thinking behind it

Asking for expertise can make leadership more shared. Notice whether your role lets others correct you without paying a social price.

The circle of competence is associated with Warren Buffett and Charlie Munger's emphasis on knowing the limits of one's understanding. This original workplace reflection uses that boundary as a reason to seek help, not as investment advice or a fixed label of ability.

Read You Have a Culture Problem by Nic Payne