##### Levels of Engagement: Decision Matrix Tool

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| **Purpose** | * To assist groups in coming to final decisions when faced with many alternatives * Assessing the relative importance of a variety of decision factors to build alignment, buy-in and support for decisions * Create a rational process to reach consensus in a group |
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| **Description** | * Brainstorm all potential alternatives/approaches * Identify evaluative criteria that will allow discrimination between options in the decision making process * Evaluative criteria are given weight to reflect their relative importance * Build consensus on a scoring system for a common understanding of the process * Potential alternatives/approaches are rated against the evaluative criteria * Ratings on alternatives and weighting on evaluative criteria are multiplied * Weighted ratings are added up and data is entered into matrix |
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| **Potential Uses** | * Engaging a group in discussion about many alternatives to enable effective decision-making * Building consensus in a group to support more effective change * Evaluating alternative solutions to issues associated with change * Enhancing the quality of decisions and support for final decisions |
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| **Level(s) of the Engagement Pyramid** | * Commitment * Belief * Understanding * Awareness |

##### Systematically identify, analyze, and rate the presence and strength of relationships between two or more options available in a decision

Facilitator Guide

Your materials include felt markers, a flip chart, Post-It Notes, a handout with the basics of this tool and instructions on how to conduct the session

**Provide a quick overview of the tool**

A Decision Matrix is a tool that allows an individual or a team to systematically identify, analyze and rate the strength of relationships between different alternatives and approaches to facilitate thorough decision-making.The Matrix is especially useful for looking at a variety of decision factors and assessing each factor’s relative importance.

Set up the exercise

**Step 1:**

Participants identify alternatives/ideas to be considered in the decision making process. Depending upon the team’s needs, these can be process steps, change projects, or potential solutions. List the alternatives/ideas down the left side of the matrix.

**Step 2:**

Brainstorm the evaluative criteria by which the decision will be made. The group making the decision must reach consensus on the appropriate evaluative criteria. List the criteria across the top of the matrix. Typically 3-5 criteria are appropriate.

**Step 3:**

If necessary, assign weights to the evaluative criteria to reflect the relative importance of each. The group making the decision must reach consensus on the relative importance of the different criteria

**Step 4:**

Before they can rate the alternatives, the individual or team must design a scoring system. Determine a scoring range (1, 5, 9 is recommended) and ensure that all team members have a common understanding of what high, medium and low scores represent

**Step 5:**

Evaluate various options listed on the left hand side against specific criteria and continue through all criteria until the discussion of all options against all criteria is complete. Rating is determined by consensus.

**Step 6:**

Total all scores for each option and determine the highest (or lowest) score

**Step 7:**

Look at the options selected and as a group determine if this process has resulted in the appropriate decision.

**Step 8:**

If the initial process reveals more than one useful alternative, review those remaining alternatives against more specific criteria with another matrix.

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| **DECISION MATRIX** | | | | | | | | |  |
| **Decision regarding** | | | | | | | | |
|  | **DECISION EVALUATION CRITERIA** | | | | | | | |
|  | Scale: 0 = lowest weighting/alignment w/ criteria 5 = highest weighting/alignment w/ criteria | | | | | | | |
|  | 1.  Example:  COST | | 2.  Example:  MEASURABLE  RESULTS | | 3.  Example:  MEETS TIMELINE | | 4.  Example:  BUILDS COMPETENCY | |
| **OPTIONS** | Rationale | Wt. | Rationale | Wt. | Rationale | Wt. | Rationale | Wt. | Total |
| 1. |  |  |  |  |  |  |  |  |  |
| 2. |  |  |  |  |  |  |  |  |  |
| 3. |  |  |  |  |  |  |  |  |  |
| 4. |  |  |  |  |  |  |  |  |  |
| 5. |  |  |  |  |  |  |  |  |  |
| 6. |  |  |  |  |  |  |  |  |  |
| 7. |  |  |  |  |  |  |  |  |  |
| 8. |  |  |  |  |  |  |  |  |  |
| 9. |  |  |  |  |  |  |  |  |  |
| 10. |  |  |  |  |  |  |  |  |  |