Priority Matrix

The key for anyone to be efficient with their time is their ability to prioritize.

Most people have a habit of focusing on the urgent tasks- those things that demand immediate attention and insists on action. Examples would be when a patient/client shows up to have a broken appliance fixed, a team member calls out sick, phones ringing or your supply order was delivered to the wrong address. Falling into this trap leads an employee down a path of chaos and stress, getting little accomplished in their day.

What every person should focus on is the important; those activities that are results-oriented and contributes to your business goals, vision and mission. Where urgent items require us to react, important matters allow us time to plan, be innovative, calculating and prepared. Some examples might be networking with colleagues to expand your professional outreach, upgrading your office technologies, obtaining additional certifications, or establishing an in-office bonus system. Each of these are important to helping you achieve business goals and yet they are not something that must be done immediately so they are not urgent.

The following activities will provide you with a clear path to eliminate chaos, reduce stress, and ramp up your p roductivity, or that of your employees, in no time.

Instructions:

1. On a separate sheet of paper make a list of all the things you need to do, want to complete, have to accomplish, and wish to balance. Think about your day and make sure to list the little things (checking emails) to the more urgent (hiring staff).

2. Look over the following matrix where Impact and Effort are considered. Efforts are the amount of time, money, energy, resources, staff, etc. you will need to mobilize to get the task accomplished. Impacts are determined by the level of change that will occur in life, finances, happiness, new patient count or other metrics that make the task worthy of completing.

3. Ask yourself, "How much effort will X task take (low or high)? If I were to finish X task how much impact will there be (low or high)? Write the task in the corresponding quadrant.

4. Focus on those tasks that are Big Wins (Low Effort/High Impact) first while tackling one or possibly two Major Projects. Fill-Ins should only be done during down time and Time Wasters should be ignored.

5. Create your strategic plan by completing the tables below.

Tips:

- Break each task down into its smallest part; NO overarching projects like 'organize storeroom.'
- You may start out with a task in one quadrant but as time and priorities change it may move to another. Embrace the change and view it as growth and forward movement.
- There are 4 Ways to Start addressing the tasks within each quadrant. With the:
1. Easiest
2. Hardest
3. One that will make the biggest impact
4. One with the most resources and support

It doesn't matter how you begin checking off your list within each quadrant as they will all be Big Wins, Major Projects, or Fill-ins. The point is that you start. So whichever way you begin, be proud of yourself and keep the momentum going.

To use this with your team:

1. Have each individual team member complete their own matrix using this document.
2. Schedule a team debriefing meeting and have each member bring their activity sheets with them.
3. Stick easel, chart paper around the room in preparation for discussions and label one Big Wins, another Major Projects, and so on.
4. Ask team members to write down their lists on each of the appropriate chart sheets. Duplicated tasks are common so even if someone has written something down, another person should write it again.
5. Debrief by asking Empowering Questions, such as:
   - What common themes do we see as tasks for Big Wins? Major Projects?
   - Fill-ins? Time Wasters?
   - What made some of you list a task the way you did?
   - What effort might a task require?
   - What impact might a task have on the team? Department? Business? Customers?
6. Complete the Strategic Planning section together by obtaining:
1) What skill requirements does this task demand in order to be done efficiently and successfully?
2) Who has the unique strengths and natural talents to complete this task?
3) Who will take the lead on making sure this gets complete?
4) When do people agree to have it complete (date)?

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Examples:

High Impact

Big Wins

- Do right away
- Important and Urgent
- Examples: Team training, Upset clients,
- Warm sales leads; Team praise/recognition;
- Decision-focused meetings
- Unscheduled rework or last-minute changes

Major Projects

- Do according to a timeline
- Planning is necessary
- Important/Not urgent
- Examples: Relationship building;
- Technology update; Personal
- Development; Department reorganization; Planning-focused meetings
- Creative work with high-quality outputs

Low Impact

Fill-Ins

- Delegate to someone else
- Urgent/Not important
- Examples: Team questions/interruptions; Office/Equipment issues; Running reports; Emails
- Most admin work

Time Wasters

- Don't do!
- Not urgent/Not important
- Delete it off the to-do list
- Examples: Personal socialmedia; Message boards; Fad programs; Gossip; Self-indulgent perfectionism; Random prattle inteam messaging

Low Effort

High Effort

Examples:

	Low Effort	High Effort
High Impact	**Big Wins**	**Major Projects**
Low Impact	**Fill-Ins**	**Time Wasters**

Create Your Strategic Plan

Now that you have organized tasks and have clarity around what is to be done, it's now time to identify if you are the right person to complete it.

Tasks and projects with the best outcomes are assigned to individuals with specific strengths that are necessary for the task or project. For example, if a project requires a detailed, highly-critical analysis and you possess all of those gifts, you would be the right person to complete that task. If you don't, you should delegate it away or partner with someone that compliments you.

Instructions:

1. Write down each task as a single, line item. The smaller and more manageable the steps the better; NO overarching projects.

2. Ask yourself if you are the right person to complete this task, if so, write your name. If not, write the name of the person you believe to be the most appropriate.

3. Define a committed Due Date and schedule a follow up meeting to verify it's complete.

4. Mark date it was Accomplished…now celebrate!

Big Wins

Item	Responsible Party	Due Date	Accomplished

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Major Project

Item	Responsible Party	Due Date	Accomplished

Time Wasters

Item	Responsible Party	Due Date	Accomplished