National **MCH** Workforce
Development Center
Advancing Health Transformation

OVERVIEW	
Purpose	The Impact Matrix: • Helps to identify and achieve agreement on solutions, strategies, projects, or activities that can be implemented with maximum impact given the effort invested • Builds **critical thinking, problem-solving,** and **strategic planning skills**
LOGISTICS	
How Much Time Does It Take?	**Total Time:** 45 minutes **Preparation time** • Preparing the facilitation team and distributing materials - **5 minutes** **Session time** • Overview of the Impact Matrix - **10 minutes** • Mapping ideas on to the matrix - **20 minutes** • Reviewing and finalizing the placement of ideas on the matrix - **10 minutes** **Follow-up time** • The facilitator may decide to synthesize results in a written report to share at future meetings and use the information to build a work plan for implementing a strategy – **time variable**
What Materials Are Needed?	• Introductory slides or talking points • Impact Matrix template (use a printed poster or project a slide image of the matrix) • Copy of Impact Matrix for each participant to guide discussion • Writing utensils • Sticky notes for matrix work **Note:** This guide describes this activity using a poster of the Impact Matrix and sticky notes for placing solutions on the matrix in a group setting.
Input	• Possible solutions, strategies, projects or activities being considered
Output	• Discussions and a completed matrix, identifying the impact of different strategies, projects, or activities based on the level of effort required.
Roles	• The facilitator presents this activity and supports individual brainstorming and mapping, as appropriate • The note taker captures the discussion on the Impact Matrix template • Participants brainstorm action ideas, map them on the matrix, and discuss results
Suggested Participants	• Any organization or group of stakeholders can use the Impact Matrix to prioritize their strategies or projects. Ideally, a maximum of 10 participants ensures that each person is able to contribute to the discussion.

Time	Steps		Guide
🕐 **10 minutes**	1. **Overview of the Impact Matrix**	a.	Facilitator introduces the Impact Matrix
🕐 **20 minutes**	2. **Group discussion of effort and impact required for each proposed action idea or solution.**	a.	Distribute the worksheets and/or hang the poster of the Impact Matrix.
		b.	Clarify the common goal the group wants to achieve
		c.	The assessment of effort and impact helps to identify and prioritize:
			"Quick Wins" – solutions that can be undertaken with the low effort and high impact.
			"Major Projects" – solutions that need careful consideration and commitment before prioritizing given the required investments.
			"Fill-Ins" – solutions that may be taken on as time is available given the low effort required, while recognizing the limited impact and potential to detract from other work.
			"Hard Slogs" – solutions that probably are not worth the investment of significant time and resources given the low impact.
		d.	Ask individuals to brainstorm and individually write their own ideas, one per sticky note. These could be strategies, projects, or activities that address the identified goal.
		e.	Then ask all participants to place their stickies on the large poster, based on the relative level of effort required to achieve the goal: *"Relative to the solutions, which of these would require the least amount of effort? Think about effort in terms of resources, time, or other costs. Which of these (solutions) would require the most effort? Place your stickies on the board according to level of effort."*
		f.	After all solutions are placed on the matrix based on their relative effort, assess the impact for each of the solutions. Make sure the group has a common understanding of the ultimate goal they want to achieve. *"How likely is this to achieve our desired outcome using this potential solution?"* *"Will this solution have a high impact?"* Move the sticky note up or down along the 'impact' axis to represent the level of impact the solution is likely to achieve. **Note:** Avoid the tendency to underestimate effort required and overestimate impact. A confidence rating can be developed for the effort and impact required, or steps required to increase confidence (completing a more thorough estimation of effort, such as calculating costs and time required, and/or calculating measures of impact)

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10 minutes	**3.**	**Review final placement of the solutions and confirm if you have agreement on which solution(s) to prioritize and implement, such as those that have high impact for low effort.**	Things to consider during the review of placement: **a.** How confident are we in implementing this solution (strategy, project, activity)? What can we do to increase confidence? **b.** When possible, consider taking the time to calculate impact using existing data.
5 minutes	**4.**	**Next steps**	The results generated in this session can be used to inform next steps, such as: • Implementing the prioritized solutions • Testing prioritized strategies, projects, or activities using the Plan-Do-Study-Act Cycle

References:
1. Boller, K. 3 Lean Six Sigma Tools Everyone Can Use. Retrieved July 24, 2018 from https://www.govloop.com/community/blog/3-lean-six-sigma-tools-everyone-can-use/

2. Anderson, B., Fagerhaug, T., & Beltz, M. (n.d.). Impact Effort Matrix. Retrieved July 24, 2018 from http://asq.org/healthcare-use/why-quality/impact-effort.html

3. Impact Effort Matrix Reference Guide How to build an Impact Effort Matrix. (n.d.). Retrieved July 24, 2018 from https://www.denvergov.org/content/dam/denvergov/Portals/728/documents/Peak_Performance/Black_Belt/Reference_Guides/Guide_Impact_Effort_Matrix.pdf