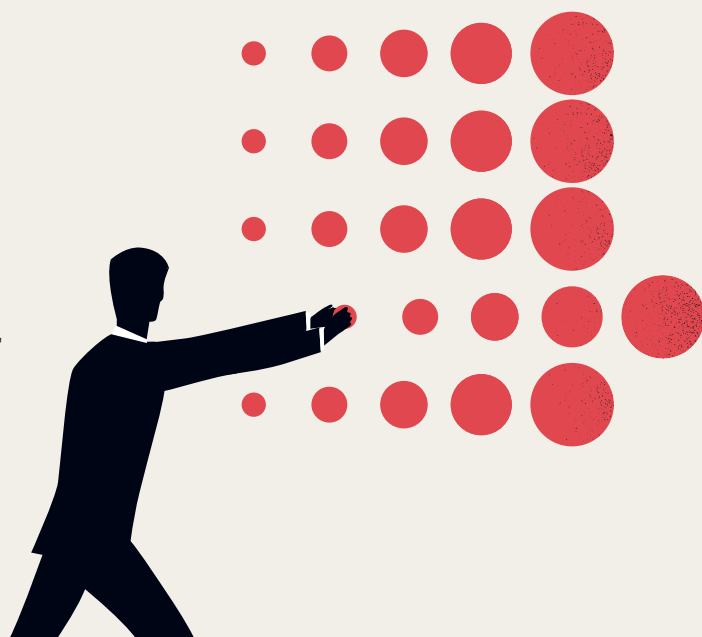


Prioritizing with Purpose

The Eisenhower Matrix, named for the U.S. five-star General and President Dwight D. Eisenhower, can help individuals align their efforts to achieve goals and meet timelines that advance the organization's objectives.

Estimated Time: 20-30 minutes + pre-work



Instructions

1. Share the template (on page 3) with your direct report(s).
2. Prior to a one-on-one meeting, invite them to write out their list of projects and tasks for the week.
3. During your one-on-one meeting, use the Expectation Setting Questions below (or ones of your own choosing) to help the team member prioritize effectively.
4. Encourage your direct report to start plotting their work in the appropriate boxes.
5. If you notice certain quadrants are abundant, use the Probing Questions to identify adjustments.
6. Check in after two weeks to discuss how the prioritization process has gone and where further clarification or support is needed.

Expectation Setting Questions

Objective: The aim of these questions is to establish a common understanding of what each term means and how it can guide your direct report's decision making.

- ▶ What does the word urgent mean to you?
- ▶ What are some of the characteristics that make a task urgent?
- ▶ What does the word important mean to you?
- ▶ What are some of the characteristics that make a task important?

Rule of thumb: Urgency is typically decided based on deadlines while importance is associated with long-term, goal-oriented objectives.

Probing Questions

If the “Do” Box Is Too Full:

Objective: These questions are designed to limit the strain that can come when there are an unreasonable number of activities that fall into the “Do” quadrant.

- ▶ What objectives are you striving to achieve?
- ▶ Which of these deadlines can be negotiated?
- ▶ Which of these initiatives is most important to the team or company?

If the “Decide” Box Is Too Full:

Objective: These questions are designed to inspire next steps when there are an unreasonable number of activities that fall into the “Decide” quadrant.

- ▶ What are your goals for this year?
- ▶ What is a realistic timeframe for these projects?
- ▶ Which of these initiatives is most important to the team or company?

If the “Delegate” Box Is Too Full:

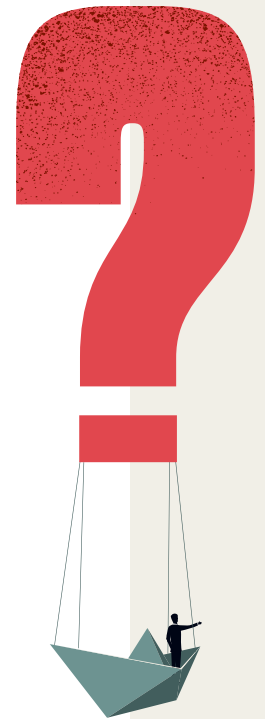
Objective: These questions are designed to support action when there are an unreasonable number of activities that fall into the “Delegate” quadrant.

- ▶ What expertise is needed to support these tasks/projects?
- ▶ Is there anyone else who might be able to conduct the work?
- ▶ If you cannot delegate this task, what boundaries can you set?

If the “Delete” Box Is Too Full:

Objective: These questions are designed to determine next steps when there are an unreasonable number of activities that fall into the “Delete” quadrant.

- ▶ Who can we negotiate with to rethink these tasks?
- ▶ Why are these projects being assigned to you?
- ▶ How can you say no to these initiatives?



The Eisenhower Matrix

Use the matrix to sort activities according to a simple framework.

- ▶ **Do** – These urgent and important tasks require attention quickly (if not immediately).
- ▶ **Decide** – These important and not urgent tasks should be scheduled into the flow of work.
- ▶ **Delegate** – These urgent and unimportant tasks should be done by other people or systems.
- ▶ **Delete** – These unimportant and not urgent tasks should be eliminated.

