Tools to Identify Priorities

October 1st, 2020

DOWNTOWN COLORADO inc.
Why identify priorities?

Organizations should understand and focus on what is important, not just what feels urgent.

Staff feel less overworked when they know which few activities are priorities.

Prioritizing can reduce costs as less-vital activities are cut and duplicated efforts are consolidated.
What is the problem?

Multiple 2020 events have unsettled existing plans requiring organizations to reactively scramble to understand what work needs to be done today.

- COVID-19
- BLM Movement
- Possible repeal of the Gallagher Amendment
- Economic Recession
- Climate Change
- Election year
Goal: To introduce the DCI community to a handful of tools that can help teams quickly and proactively identify and prioritize their work.

Effective Brainstorming

4 Blocker Chart

Pareto Chart

Why use it?

What is it?

How to use it?

How to interpret it?

How can it help?
Please rate the degree to which you agree or disagree with the following statement: My organization currently has a clear sense of direction and understanding of what the top priorities for the organization are.

- Strongly agree
- Agree
- Neutral
- Disagree
- Strongly disagree
Brainstorming

Produce many ideas or solutions in a short amount of time

Identify and understand main concepts

Create buy-in by ensuring all team members’ ideas are considered
What is Good Brainstorming?

Round Table Discussion

- Subject to “influencer bias” or “center of gravity”
- Off topic rabbit holes
- Limited team input
- 1 to 2 ideas generated in 5 minutes for a team of 5
What is Better Brainstorming?

Facilitated Discussion

• Impartial facilitator
• Solicit input from more team members
• Reduce "influencer bias"
• 3 to 5 ideas generated in 5 minutes for a team of 5
What is Effective Brainstorming?

Exponential Sticky Note

• Eliminate “influencer bias”
• Gather input from all team members
• Exponential idea generation
• 15 to 25 ideas generated in 5 minutes for a team of 5

10 times the number of ideas in the same amount of time
What type of brainstorming has your organization used in the past?

- Good brainstorming (round table)
- Better brainstorming (facilitated discussion)
- Effective brainstorming (exponential sticky note)
- We have never used brainstorming
- We use a different type of brainstorming
1. Create a clear brainstorming problem or opportunity statement

Opportunity: What work processes could be improved upon?
Opportunity: What work processes could be improved upon?

- Where are we behind our competition?
- Which customers' needs will likely change soon?
- What gaps, risks, or barriers are preventing us from achieving our goals?
- Which processes consistently fall short of desired results?
- Which processes have considerable variation?
- Which processes cause major delays or rework or have significant amounts of waste?
- What concerns have team members raised recently?
3. Clarify what a good idea looks like

Opportunity: What work processes could be improved upon?

Where are we behind our competition?
Which customers' needs will likely change soon?
What gaps, risks, or barriers are preventing us from achieving our goals?
Which processes consistently fall short of desired results?
Which processes have considerable variation?
Which processes cause major delays or rework or have significant amounts of waste?
What concerns have team members raised recently?

Good Idea Statement
Lack of diversified revenue streams could lead to unstable cash flows
- Case management process is not documented leading to variability in data entry and wasted time to reverify data entry

Bad Idea Statement
- Revenue streams
- Case management process
4. Let everyone privately generate as many ideas as they can in 5 to 10 minutes on sticky notes

During virtual meetings, teams can utilize the chat feature of a video call and privately message their ideas to a designated facilitator.
During virtual meetings, the designated facilitator can visualize ideas using “virtual sticky notes” (text boxes) by copying ideas into PowerPoint, Excel, etc.
Organizing ideas into logical categories or themes based on the natural relationships between the ideas can help a team understand the main concepts generated during brainstorming sessions. Remember that if an idea does not fit into a category, it may be worth creating a new category.
Brainstorming Outcomes

Produced many ideas or solutions in a short amount of time

- Identified and understand main concepts
- Created buy-in by ensuring all team members’ ideas are considered

But how does a team identify which ideas are their top priorities or understand the potential benefits for a group of ideas?
Map ideas based on their relative effort to implement and impact to an organization

Identify high impact, low effort quick wins

Visualize all opportunities against one another for selecting priorities
What is a 4 Blocker?

Impact

High

Low

Implement

Challenge

Possible

Kibosh

Effort

High

Low

Prioritize and Implement

Review and Consider

Kibosh

Impact

Low

Negative

Low

High

Effort

OpEx In-A-Box
How to use a 4 Blocker

PowerPoint Demo
1. Place each main concept on the 4 Blocker one at a time and relative to one another

**Impact**

High

Task management, personal efficiency, time management

Efficiently putting information out there/pre screen

Managing and limiting distractions

Clio to Filevine transition

Bringing in new work/calls

Overlap certain aspects of jobs, backup for each other

Is this tool effective, not using tools we decided on

New process needed

**Effort**

Low

High

OpEx In - A Box
2. Determine which concepts should be selected as a priority

- Task management, personal efficiency, time management
- Efficiently putting information out there/pre-screen
- Managing and limiting distractions
- Clio to Filevine transition
- Bringing in new work/calls
- Overlap certain aspects of jobs, backup for each other
- Is this tool effective, not using tools we decided on

Effort:
- Low
- High

Impact:
- High
- Low
- Negative

OpEx In-A-Box
Mapped ideas based on their relative effort to implement and impact to an organization

Identified high impact, low effort quick wins

Visualized all opportunities against one another for selecting priorities

But what if a team is still unable clearly identify their top priorities using a 4 Blocker?
Pareto Chart

Determine which ideas contribute most to a problem (e.g., time, cost, count, etc.) and should be prioritized

80/20 rule

Focus efforts where you will have the largest impact
What is a Pareto?

Pareto Analysis

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<th>Task management, personal efficiency, time management</th>
<th>Efficiently putting information out there/pre-screen</th>
<th>Managing and limiting distractions</th>
<th>Clo to Filevine transition</th>
<th>Is this tool effective, not using tools we decided on</th>
<th>New process needed</th>
<th>Bringing in new work/calls</th>
<th>Overlap certain aspects of jobs, backup for each other</th>
<th>Search engine optimization</th>
<th>Website redesign</th>
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How to use a Pareto

Excel Demo
Interpreting the data

No Pareto effect
- Use impact (time, cost, etc.) instead of count/frequency
- Revise causes/categories
- Consider what could impact all causes

Clear Pareto effect
- Just a few causes account for most of the outcome or problem
- Focus improvement efforts on those causes
Pareto Chart Outcomes

Determined which ideas contribute most to a problem (e.g., time, cost, count, etc.) and should be prioritized

80/20 rule

Focused efforts where you will have the largest impact
Next steps

Why?
What?
How?

Tools to Identify Priorities
• Effective Brainstorming
• 4 Blocker
• Pareto Chart

Utilize these tools to identify ideas and prioritize work and opportunities within your organization
What is the likelihood that your organization will make use of one of these tools (Effective Brainstorming, 4 Blocker Charts, and Pareto Charts) in the future?

- Very likely
- Likely
- Neutral
- Unlikely
- Very unlikely
Summary of New Skills

Effective Brainstorming: Setting aside 5 to 10 minutes and letting everyone document their ideas on a sticky note can lead to exponential idea generation compared to round table discussions. Sticky notes also allow the voice of everyone in the room to be heard and prevents an influential person from silencing the ideas of others. During a virtual meeting, teams can utilize the chat feature of a video call and visualize ideas using “virtual sticky notes” (text boxes) in PowerPoint.

Affinity Diagram: Organizing ideas into logical categories based on the natural relationships between the ideas can help a team understand the main concepts generated during brainstorming sessions. Remember that if an idea does not fit into a category, it may be worth creating a new category.

4 Blocker: It may be difficult to identify the top priorities or understand the potential benefits a group of ideas might have. Mapping ideas based on their relative effort to implement and impact to the organization allows teams to pick out quick wins (high impact, low effort) projects as well as visualize all other opportunities against one another for selecting priorities.

Pareto: If picking a top priority using a 4 Blocker is not straightforward, consider using a Pareto. A Pareto is a specialized bar chart that can help identify the “vital few” opportunities or problems. The frequency or impact (time, cost, etc.) can be used to evaluate each idea or category. If using impact the comparison is straightforward. If using count, surveys or impromptu voting can be used to determine the priorities. In a team setting, voting can be performed by having each team member assign a 1 to 10 score for each idea or category, writing their score next to ideas on a white board.
About OpEx In-A-Box

OpEx In-A-Box provides Operational Excellence consulting and tools for nonprofits and businesses. Operational Excellence is the ability to effectively, efficiently, and sustainably deliver a mission or objective. We help organizations achieve Excellence by ensuring they proactively manage risks before issues can jeopardize the organization, eliminate inefficiencies and simplify processes to save costs through improvement and innovation, and develop healthy organizational cultures that retain talent and unlock the potential and skills of people. Our hope is that Operational Excellence becomes a normal practice for nonprofits that want to maximize their social impact and businesses that want to excel in their sector.

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