

Lucid Facilitator's Guide

GETTING CLARITY ON DECISION MAKING

This process helps you and your team get clear on how key decisions will be made in the organization. At the end of the meeting, you will have a documented Decision Matrix listing types of decisions and how your team intends to handle each one going forward.

Teams that use a Decision Matrix experience increased accountability, operational clarity, and decision velocity. Use this template to get started.

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WHY CREATE A DECISION MATRIX?

by [Tammy Adams Spann](#)

Have you ever given your opinion and had it implemented as a decision? Worse yet, have you made a decision only to have it overridden by someone higher up the food chain?

As a professional facilitator, I've worked with teams that are reticent to take on the responsibility (and consequences) that go with making a decision. Similarly, I've heard leaders complain that their teams expect them to make every decision.

If any of this sounds familiar, the Decision Matrix is a tool you'll want to explore.

The Decision Matrix was the brainchild of [Eric Coryell, president of Core Connections LLC](#). When I heard Eric speak about this tool in a webinar, I immediately recalled all the leadership teams I've worked with that struggle with role clarity; the basic question being what's mine, yours, and ours. It has become a staple in my facilitation tool bag.

This discussion is designed to help leaders learn to delegate decision-making and stimulate the leadership team to take on more accountability. It's not intended to be a one-and-done, but the beginning of an iterative process of leadership team growth. This meeting can be led by a facilitator or the leader themselves.

At the end, you'll have your first pass at the Decision Matrix, answering that all-important question "Who's got the D?" for a range of the every-day decisions that need to be made to keep your business humming.



EXAMPLE DECISION MATRIX

Here’s an example of what the Decision Matrix looks like after it’s been filled out. You will find a blank Word template for creating your own Decision Matrix included in the packet with this guide.

Category	Who Decides	Decisions That Need to Be Made
1	Tammy (<i>leader</i>)	Setting goals for our metrics
1	Tammy	Capital expenditures prioritization and execution
2	Sheila	Determining if we are going to work holidays
2	Sheila	Deciding when to hire a new production employee
3	Sheila	Establishing resource priorities
3	Sheila	Overtime decisions (Operators)
3	Sheila	Ordering temps
4	Sheila	Disciplinary process (Team Leads for severe/potential dismissal)
3	Allen	Firing operators
2	Paul	Changing label supplier
4	Paul	Changing any shop supplies providers
2	Exec Team	Expenses over \$500 per line item
3	Exec Team	Leveraging resources from other departments
3	Team Leads	Expenses less than \$500 per line item
4	Team leads	Disciplinary process (Operators)
4	Prod. Team	Who to hire for a new production employee

Key to Decision Categories:

- 1. Leader decides** (with or without input)
2. Team or individual decides; **leader wants to know before the decision is made**
3. Team or individual decides; **leader wants to know about it afterwards**
4. Team or individual decides; **leader doesn’t need or want to know about it**



AGENDA

GOAL

To determine how decisions will get made within this team so that we can become more accountable and effective in getting work done.

DURATION

2.5 Hours

- ① Why are we here today?
- ② What decisions do we make?
- ③ How are decisions made today?
- ④ How do we want to make decisions in the future?
- ⑤ What are our next steps?



STEP-BY-STEP INSTRUCTIONS

Before the Meeting

Determine who will facilitate.

If you already have an effective working relationship as a team and just need better clarity on how decisions get made, the senior leader may be fine running this meeting on their own. On the other hand, teams that don't yet have a great working relationship should enlist the help of an outside facilitator.

Even when your team works well together, consider bringing in someone from outside the group to facilitate. This frees everyone on your team to fully concentrate on creating the Decision Matrix.

Schedule at least one week in advance.

This will give team members time to prepare for the meeting. **Include these instructions in the invitation.**

Everyone:

Observe the decisions you make or need made over the next week. No need to write them down – just be aware.

Leader:

Be aware that you will be asked to identify decisions that you want to own. Start thinking about what you are willing to delegate.



Prepare the meeting space and supplies.

You will be using several flip charts or white boards to capture ideas and build your Decision Matrix. Set these up before the meeting.

- **Post the Meeting Purpose, Agenda and Deliverables** where everyone can see them. This will allow you to more easily guide the group through the activities.
- **Prepare an area for the “Parking Lot”**. This will be where folks can put items that are for discussion later (perhaps at another meeting).
- **Prepare an area for capturing action items**. This will be where folks can put items that they’ve committed to doing (with their name & due date attached).
- **Set up three large areas** on a white board, three separate flip chart sheets posted to the wall, or a collaborative online software with three headings. Label these:
 1. Decisions We Make
 2. How Decisions Get Made Today
 3. How Decisions Will Get Made Going Forward.
- **Get a 4x6 sticky note pad and a pen** for each attendee.
- **Post the Fist to Five definitions** (shown on the next page) where everyone can see them.

Equipment List

In Person Meeting	Virtual Meeting (see more tips)
<ul style="list-style-type: none"> • Flip chart paper • 4x6 sticky notes (all one color) for attendees • 6x8 post-it notes for the Parking Lot and Action Items • Fine point Sharpies • Clock in the room or a timer 	<ul style="list-style-type: none"> • Video conferencing software, ideally with support for breakouts such as Zoom or Adobe Connect • Meeting management software (e.g. Lucid Meetings) OR a collaborative document editor (e.g., Google Docs, MS Word Live, or Dropbox Paper)





No way!
I'll block this.

I see MAJOR
issues we need
to resolve.

I see MINOR
issues we need
to resolve now.

I see minor
issues we can
resolve later.

I'm fine with
this as it is.

I love this!
I will champion it.

Lack of Consensus

Consensus

5 fingers	I love this! I will work to champion this.
4 fingers	I am fine with this; no worries.
3 fingers	I have a minor issue that can be worked out later. I can live with and support it.
2 fingers	I have some minor issues that feel resolvable and then I can live with and will support it.
1 finger	I have major issues. They may be resolvable but will probably need some additional work outside of this meeting.
Closed fist	No way! I cannot let this decision go forward no matter what. The issues are so extreme I cannot see any possible resolution.

Note: There are many ways to define the levels in the Fist to Five. This is the version that Lucid Meetings publishes in meeting templates. Please use the version that makes best sense for your.



During the Meeting

1

Why are we here?

Purpose	To set the tone for real and honest conversation in the meeting. To help the team understand the importance of getting clear on decision-making.
Outcome	Any questions about the meeting intentions are answered
Duration	15 minutes

Instructions

(OPTIONAL) If this meeting is being facilitated by someone not familiar with the team, introduce yourself and ask each person to introduce themselves and the area of the organization they are responsible for.

Then, the Team Leader/Executive should:

- **Explain why you believe it is important to get clarity around decision-making** in your organization and, if appropriate, share a few examples of unclear or confused decision-making in past to demonstrate the problem.
- **Quickly review the agenda and the intended outcome** - the first iteration of the Decision Matrix identifying key decisions and who is responsible for making them.
- **Answer any questions** the team might have.



2

What decisions do we make?

Purpose	To define the decisions that get made by this team
Outcome	A list of all the decisions that get made by this team
Duration	30 minutes

Instructions

Make sure everyone has a stack of 4x6 sticky notes and a Sharpie, then say:

“In just a moment I’m going to ask you to answer a question. When I do, I’d like you to write your answers on the sticky notes. One answer per note. You’ll have about 2 minutes. Any questions about the instructions?”

Answer any questions and make sure team understands the instructions, then say:

“OK, here’s the question I’d like you to answer...**what are all the decisions that we make around here?**”

Give the folks about 2 minutes to write down their responses. If you are participating in the brainstorm, it may be easier to set a timer so you can focus on your answers. Then after 2 minutes, say:

“I’m sure there are some duplicates among the items we’ve listed, so **let’s identify the ones that are unique.** I’m going to go around the room and ask each of you to read one of the items you wrote. If someone before you says an idea that is the same as or very similar to yours, move that post-it off to the side. Any questions?”

Ask for a volunteer to start.



2

continued

Ask them to read one of their answers and post it under the “Decisions We Make” board. Add a number “1” to this item, explaining that you will number all the ideas so they can be easily referenced later.

Ask if there are any clarifying questions about the item. Discuss briefly, if needed, to allow folks to get clear on whether their items are the same or different.

Go clockwise around the room, having each person read their unique idea. Remind folks that if they had something the same or very similar to move it off to the side, and pause to get clarification as needed. Continue until everyone has read one idea, then say:

“We will continue going around until we’ve gathered all the unique ideas. If all of your ideas have been taken, feel free to pass.”

Go around to gather unique ideas until there are no more.

3

How are decisions made today?

Purpose	To identify who currently makes the decisions listed.
Outcome	Identification of where we agree / disagree on who makes the various decisions.
Duration	30 minutes

Instructions

During this agenda item, your team will discover how decisions are made today. First, everyone will independently write down how they believe decisions are made. You’ll then compare your beliefs in small groups and finally all together, noting and discussing any differences.

Step 1: Individual Assessment



3

continued

Ask each person to write the reference #'s for each unique idea on a single sticky note or piece of scratch paper. For example, if there were 11 items on the board under "Decisions We Make", you'd list the numbers 1 through 11 on your paper.

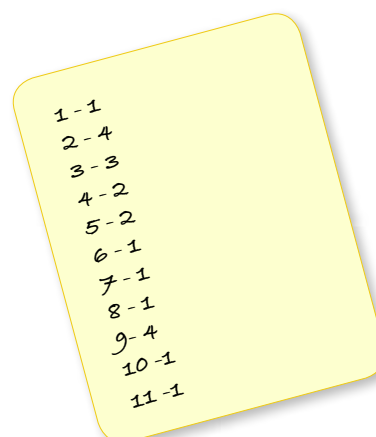
Say:

"Each of these decisions gets made today by someone. Using the following categories, I'd like each of us to identify how the decisions get made today."

Introduce the **Decision Categories**:

1. **Leader decides** (with or without input)
2. Team or individual decides; **leader wants to know before the decision is made**
3. Team or individual decides; **leader wants to know about it afterwards**
4. Team or individual decides; **leader doesn't need or want to know about it**

Ask each person to individually write down how each decision on the "Decisions We Make" list is made today (e.g., 1, 2, 3 or 4). Suggest that they come up to the wall to read the post-its again. Their individual list may look something like this...



3

continued

Step 2: Small Group Discussion

Divide the group into sub-teams of 3 to 4 people. **Give them 10 minutes to compare notes and consolidate their items into one list they can agree on.**

Leader: DO NOT participate in a sub-team. **Take this time to identify which of these decisions you see as yours (i.e., #1's) and which you want to delegate (i.e., 2, 3 or 4's) going forward.** Remember, the goal here is growing team accountability so the fewer decisions that are yours alone, the better.

Step 3: Review Results as a Group

Gather the results to see where folks have the same beliefs and where they differ.

- Go to the flip chart or document labeled “How Decisions Get Made Today”.
- Ask one team to present their thoughts. Capture their answers.
- Ask a second team to share where their thoughts differ and write down the differences.
- Continue report out, noting where there are differences, until all teams have reported out.

Review the results.

- Circle or highlight the items where there are differences.
- Read the corresponding notes from the original list of decisions and put stars on them.

Example

1 - 1

2 - 4, 3

3 - 3

4 - 2

5 - 2, 4

6 - 1

7 - 1

8 - 1, 2

9 - 4

10 - 1, 4

11 - 1



4

How do we want to make decisions in the future?

Purpose	To define who will make each of the decisions going forward.
Outcome	Identification of who will make each decision.
Duration	45 minutes

Instructions

On the space you've prepared titled "How Will Decisions Be Made Going Forward?" write the reference #'s for each unique idea (e.g., 1 through 11 in our example), then say:

"Now let's discuss how we are going to make these decisions going forward. This is iterative. We're going to test it to see how it works and adjust as needed. I'd like this to be a consensus decision, so I'll be checking whether you can live with and support the results, at least for the first iteration, when we finish."

If you are the Team Leader/Executive, say:

"First, I'd like to be clear about which decisions I see as mine. I may get your input before making them, but the decision will ultimately be mine."

Put a #1 for those decisions the leader wants to own on the "How Will Decisions Be Made Going Forward?" chart and ask:

"Of these, are there any you have concerns or questions about?"

If so, discuss and adjust, if needed. Then ask:

"Of the ones remaining, are there any you think should be mine? Why?"

4

continued

Discuss and define the category for these decisions.

For the remaining decisions, **the Team Leader/Executive should first identify which ones they would like to be informed about before they are made (i.e., these are 2's) and why.**

For each 2, mark it on the “How Will Decisions Be Made Going Forward” chart and discuss:

- Will this decision be made by an individual, a subset of individuals, or the team as a whole?
- If an individual or subset, who are they? Write each response beside the number on the chart.
- Are you comfortable talking to the Team Leader/Exec about this before making it?
- Team Leader/Exec, can you commit to offering additional knowledge without taking on the role of making the decision?

Ask “Which of the remaining decisions are 3's?” For each 3, mark it on the “How Will Decisions Be Made Going Forward” chart and ask:

- Who will make it - an individual, subset set or full team? Write each response beside the number on the chart.
- Are you willing to commit to letting the Team Leader/Exec know about this after making it?
- Team Leader/Exec, can you commit to not forcing a change of decision once you hear about it?

Ask “Are any of the remaining decision's 4's?” If so, mark these on the chart and define who will make it - an individual, subset set or full team.

Then ask:



4

continued

- Team Leader/Exec, can you commit to not getting upset because you didn't know about these?

Check for consensus using the Fist to Five. Say:

“The Fist to Five is a method for determining whether you've reached consensus or if further discussion is needed. Each of you will be asked to indicate your level of agreement using your fingers.”

Review the “Fist to Five” definitions you posted earlier.

The only rule...Everyone must do it at the same time. No waiting and looking around the room to decide what you should do. Say:

“I'd like to know your level of agreement around “How Will Decisions Be Made Going Forward?”. So you'll be indicating a 1, 2, 3, 4 or 5 with your fingers. Any questions?”

Then once questions are answered:

“Please show me where you stand by using the Fist to Five.”

If everyone presents all threes to fives, then consensus is reached. The group may need to note the minor issues and proceed.

If there are any twos, ones, or fists, the group will need to have further discussion. Ask those folks:

“What would it take to move you to a 4 or 5?”

Revise the recommendation as needed, discuss, and do another Fist to Five to confirm consensus.



5

What are our next steps?

Purpose	To define what needs to occur post-meeting to test our new model of decision-making.
Outcome	Agreement around action items that need to be completed to test new model. Next meeting date to evaluate results
Duration	30 minutes

Instructions

Define the next steps needed to test these results. Capture these on a white board or flip chart, along with who will do it and by when.

Clear the parking lot. If there are any items in the parking lot, discuss whether they were resolved during the meeting or need some action to resolve post-meeting.

- If resolved, hand the post-it back to the person who identified it.
- If not resolved, create an action item with owner & due date to address the item.

Set meeting date to reconvene and evaluate progress.

Executive/Team Leader - Thank the team for working through this and commit to doing your part!



Congratulations!
You're done.





After the Meeting

Document the results into the Decision Matrix template, then **send out the meeting record including the action items and the Decision Matrix in a follow-up email**. This makes sure everyone gets their action items and a full report in their inbox, even if they couldn't attend the meeting.

Running a Follow-Up Meeting

This meeting helped your team create the first iteration of your Decision Matrix. **This process is intended to be iterative**. Your team made some choices, will try it out, then come back together to see how it's working and make needed shifts. Consider the result of your first meeting the initial draft and plan to discuss the Matrix again at a future team meeting to see how it's working.

Here's a suggested outline for the follow-up conversation.

Follow-Up Meeting Purpose:

To make any needed adjustments to our decision-making process so that we continue to grow and get things done.

Meeting Deliverables:

- Updated Decision Matrix
- Next Steps to Communicate & Implement Key Decision-Making Shifts

Meeting Agenda

1. Why are we here?
2. What's working well and what could be improved in our decision-making?
3. What needs to shift to be more effective?
4. What are our next steps to communicate & implement these shifts?



WHAT TO DO WHEN YOU CAN'T MEET IN PERSON

This meeting is designed to be held when the whole team can be in the same room, where it's easier to see body language, build trust and seek accountability. **I strongly recommend running this meeting in person** whenever possible.

When that isn't possible, here's how to succeed if you must meet online.

1. Use video conferencing.

Video conferencing software makes it possible to see the reactions of other people in the meeting, restoring some of the nonverbal trust-building communication you lose. Our recommended video conferencing platforms both support breaking out into smaller groups, which you'll need during agenda item 3.

2. Set up a shared note taking space.

If you use Lucid Meetings, the built-in template takes care of all of this for you. If you prefer to use a collaborative editor instead, create a single document with the headings described in the preparation instructions. You will also want to create a presentation with the meeting agenda, Fist to Five definition, and Decision Categories for easy reference.

3. Ask everyone to open a blank document for taking personal notes.

They will use this document to type in the list of decisions during agenda item 2. When it is time to share ideas, each person will take turns copying and pasting any unique decisions into the shared note taking space. In agenda item 3, they will use this document for writing their personal beliefs about how each decision is made.

4. Add a break.

This is a long meeting to run online. Consider adding a 10 minute break between agenda items 3 and 4.



ABOUT THE AUTHOR



This template was designed by [Tammy Adams Spann](#),
President of Chaosity LLC.

Chaosity LLC is a woman-owned organization focused on bringing clarity to the chaos of leadership through improved collaboration. Tammy is a Certified Professional Facilitator (CPF) and has co-authored two books on the topic of facilitation - [Facilitating the Project Lifecycle](#) and [The Project Meeting Facilitator](#).

For the past 20 years, Tammy has worked with organizations around the country to...

Collaboratively Improve Business Processes

- Helping teams make their current processes transparent.
- Identifying improvements that move them swiftly to the strategic goals.
- Creating new processes to support changes in business.
- Transferring continuous process improvement skills into the organization.

Facilitate High-Stakes Meetings

- Helping teams think through and resolve complex issues.
- Jointly developing integrated time lines and action plans for getting work done.
- Aiding stakeholders in defining their strategic vision and a plan for getting there

Train Others in Collaborative Leadership & Facilitation Skills

For more information visit www.chaosity.com or send Tammy email at tadams@chaosity.com.



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Additional Resources Available from Lucid Meetings

Tammy Adams Spann's Work with Lucid Meetings

- [Blog Posts and Meeting Designs by Tammy Adams Spann](#)

Meeting School Resources

- [40+ Sample Agendas with Facilitator's Guides](#)
- [How to make decisions in meetings](#)
- [The 16 Types of Business Meetings](#)
- [The Meeting Performance Maturity Model](#)
- [How to Structure Effective Meetings](#)
- [How to Create Meeting Agendas](#)
- [How often should you meet?](#)
- [What goes into a meeting invitation?](#)
- [What goes into meeting notes?](#)
- [Glossary of Meeting Terms](#)



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Learn more on our website at www.lucidmeetings.com