

IMPACT/EFFORT MATRIX

What: An assessment and decision-making exercise to sort and examine ideas by impact and effort and make a plan of action to achieve a given project or strategy.

Why: You can apply this tool to any group of ideas, strategies, and projects to assess and prioritise them based on the effort required and the potential positive benefits. The matrix helps uncover possible actions mapped against the effort required to implement, as well as their potential impact. For example, some ideas, solutions, or actions are costly but may have a bigger long-term payoff than short-term actions. Categorising ideas, solutions or actions along these lines is a useful technique in decision making, because it forces you to balance and evaluate suggested actions before committing to them.

When: This is a useful exercise when facing a variety of options to solve a programmatic or operational challenge or when designing activities. It can help you prioritise and do action planning at the onset of a project. The tool can also be used if facing challenges during project or strategy implementation to help teams choose actions and solutions get back on track.

Step 1

PREPARE THE EXERCISE

Face-to-face: Draw a 2x2 matrix on a big flip chart, organised by impact and effort as illustrated below:

Impact: The potential payoff of the action vs.

Effort: The cost of taking the action. (Costs can be financial, but also human resources, time, and complexity to perform the action.)

Make sure to leave enough space for 6–8 sticky notes in each square.

Online: Prepare the 2x2 matrix on a Miro board. Before the workshop, encourage participants to familiarise themselves with the platform. You can share [this short video tutorial](#) in advance.

To frame the exercise, choose a concrete and well-scoped challenge or opportunity you want to focus on to reach your project or strategy goal.

Prepare a big flip chart with a “What we need to do sentence”, e.g., “What we need to do to reach the project object at this stage is...” and hang in on the wall where you will conduct the exercise. Participants will start the exercise by brainstorming ideas, solutions, or actions to answer this question.

INFORMATION

PHASE
DESIGN

TIMEFRAME
60-120 MINS.

MODE
BOTH

PARTICIPANTS
4 - 10

FACILITATION LEVEL
BASIC

MATERIALS
FLIP CHART, MARKERS,
STICKY NOTES, PENS, AND
TIMER.

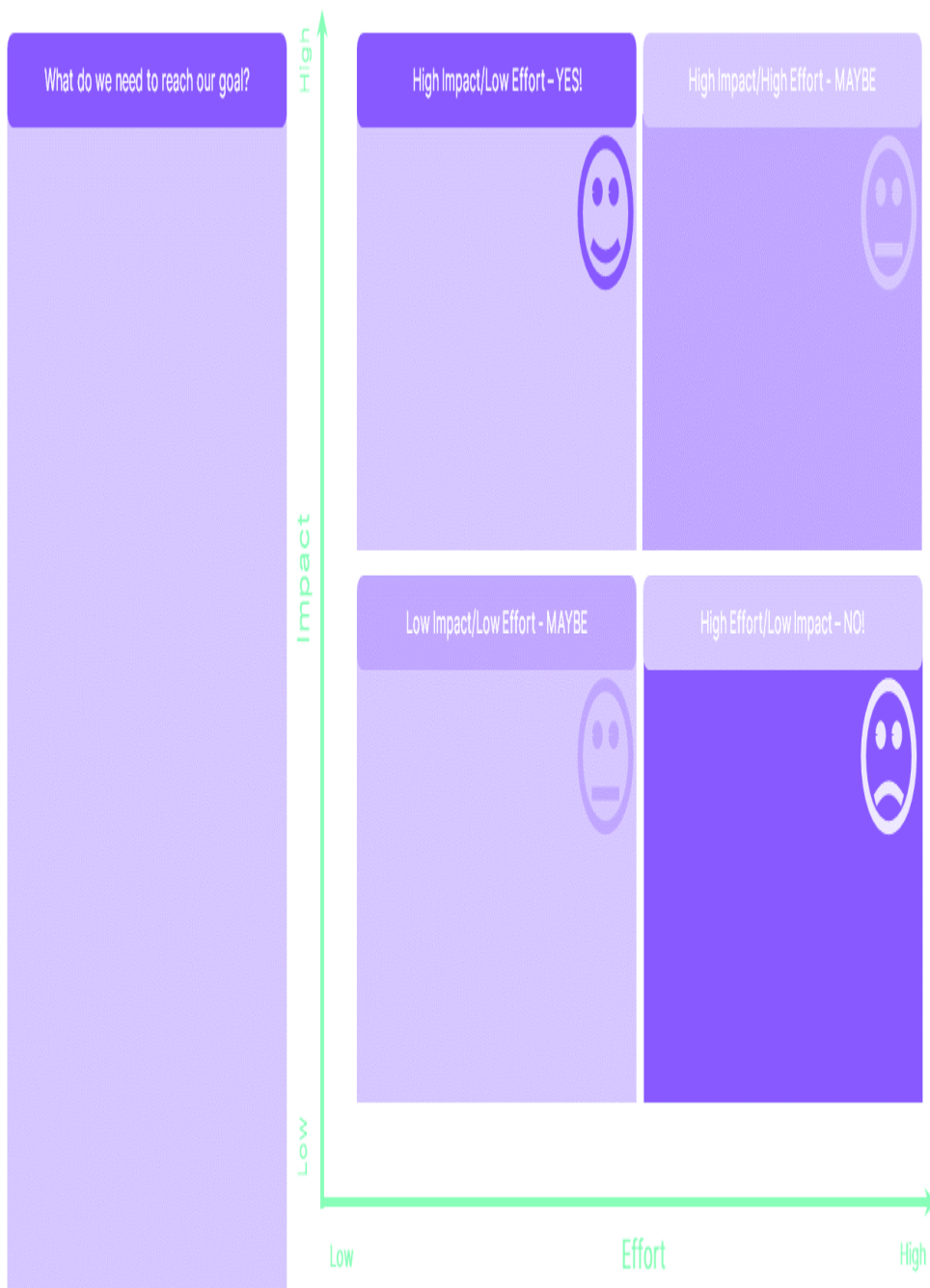


Illustration of the Impact/Effort matrix

When choosing participants for this exercise, make sure they are able and, in a position, to make decisions. Complete any required preparatory work to ensure that participants will be able and equipped to make decisions, for example, consultations and clearance from stakeholders who may be influenced by the decisions or who may be responsible to make the final decisions.

Facilitator tips

If the challenge or opportunity is not scoped well enough, but is too wide, the exercise can be difficult to manage and the ideas, solutions, or actions will not be precise enough to prioritise and plan adequately.

Step 2

BRAINSTORM

Introduce the participants to the timeframe and the purpose of the exercise by going through the following:

- What are we going to do today?
- Why are they invited?
- What are their roles (if participants do not know each other well)?
- What is the timeframe?

To start the exercise, divide your participants into small groups of 3–4. Introduce your chosen “What we need to do” sentence representing the challenge or opportunity they will focus on.

Now, ask the groups to brainstorm ideas, solutions, or actions in response to the pre-selected “What we need to do” sentence and note them down on sticky notes in the groups. Following, they should place their notes within the 2x2 matrix according to how they, as a group, think it best matches the effort and impact.

As the groups place their ideas in the matrix, ask participants to discuss the positioning of their sticky notes in the respective squares in their groups and agree before placing the notes. The category of high impact/low effort will often hold the set of ideas that the group is most agreed upon and committed to.

Allow 10–15 minutes for this step, depending on the number of participants.

Facilitator tips

Encourage the groups to be completely honest and realistic about the level of effort required for each idea, solution or action and as accurate as possible about the projected impact – best if the impact can be based on data or other evidence.

Remind participants to consider current strategies and plans, current operational set-ups, as well as resources and capacities, and internal and partnership factors.

Step 3

PRESENTATIONS & DISCUSSIONS

Gather the whole group to go over the matrix. Have one person per group present their inputs while briefly stating the rationale for their choice of placement within the matrix. If there are duplicates of ideas, solutions, or actions, consolidate these. If there are disagreements on placements, allow for discussion to reach agreement.

When there is full agreement on inputs and placement of sticky notes, you have your final impact/effort matrix.

Allow 20–30 minutes for this step, depending on the number of participants.

Facilitators tips

The discussions in this step can be very lively, try to ensure all participants contribute and the most vocal are not dominating the discussions. “Stress test” prioritisation of ideas, solutions, or actions by prompting the participants to evaluate against current strategies, plans, resources, current and expected future contextual factors etc.

Step 4

ANALYSE THE MATRIX AND NEXT STEPS

With the final matrix in place, you should consider each square:

- **Upper left:** This is the sweet spot – the low effort/high reward area. Here are the ideas, solutions or actions teams should pursue for relatively easy actions that can lead to substantial impact.
- **Upper right:** Solutions that fall into this square also offer big rewards, but they are far more difficult to do. You should only pick these ideas, solutions, or actions if you are committed to the long period of hard work it will take to achieve them.
- **Lower left:** While these take little effort, teams should maybe not prioritise these ideas, solutions, or actions here unless they can be done with very little efforts, the team has time available, and they fit perfectly with current plans. Instead, they should only give them attention after pursuing more rewarding ideas, solutions, or actions.
- **Lower right:** Any ideas, solutions, or actions that fall into this category require some honest discussion around whether the team should do them at all. Assess the impact of not doing this work and shift priorities to more impactful solutions.

Next step: Discuss how you want to advance on the matrix inputs considering your strategies, plans, operational set-up, etc. Decide who will do what and when to take the matrix to the next level and start your action planning. Remember to thank everyone for their time and insights.

Allow 10–15 minutes for this step.