

## *Quick Tips for Team Leaders*<sup>1</sup>

### **Taking Action: Decision Grid + Pick Chart**<sup>2</sup>

**Jeff Oltmann**

#### **Decision Grid**

A decision grid helps select the best option from several defined choices. The options are evaluated on important criteria. For example, a decision grid can be used to help a car purchase decision by rating alternative car models on important features like safety, gas mileage, performance, and styling. Criteria can be treated equally or given weights relative to each other – for example, for some people styling is twice as important as anything else. Often the chief value of a team rating exercise is in the discussion and prioritization that it encourages rather than in the absolute point winner.

This tip describes a simple rating system that is sufficient for many uses. There are more sophisticated methods of weighting priorities and rating options, such as used in quality function deployment (QFD).

#### **When to Use**

- Selecting the best option from several well-defined choices
- Making priorities and feature comparisons explicit

#### **Procedure**

Decide which criteria will be used to rate the options. They should reflect the essential features desired in the solution. Clearly define them and determine what weights, if any, should be assigned. If this is complicated or contentious, use a separate technique such as pairwise analysis or weighted voting to determine the criteria.

Name and clearly describe each of the options to be evaluated so that participants have a thorough understanding. Create a rating matrix with option names on one axis and criteria on the other. Define a rating scale that clearly defines the possible rating values.

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<sup>1</sup> This series of “Quick Tips” articles is by Jeff Oltmann, experienced program and technology executive and principal of Synergy Professional Services, LLC in Oregon, USA. The Quick Tips offer simple approaches and models for problem analysis, gathering ideas and input from team members, facilitation and taking action. The tips offered in this series were identified or developed over two decades of helping program, project and team leaders get things done in faster, more agile ways. Learn more about Jeff Oltmann in his author profile below.

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As a group, rate the performance of each option against all criteria by entering a value into every cell in the matrix. It may be difficult to reach consensus on a value, indicating either a need for further research or for a decision, depending on the situation. Use an appropriate tool to get the needed information (e.g., research) or decision (e.g., voting).

**Considerations**

1. Start filling in the matrix by rating an item that is not contentious and is on one extreme of the rating scale. This will serve as an “anchor” for other ratings.
2. Rate all options on a particular criterion before going to the next criterion.
3. Encourage a spread in the ratings. If most ratings are a middle value, it will be difficult to distinguish between the options.
4. It is normal to discover part way through the process that a previous weighting, criterion, or rating should be changed. This may indicate legitimate new understanding but be careful of a subtle bias to get the preferred answer.
5. Define criteria and ratings such that desirable ratings convert to consistent numbers on the scale. For example, if you are rating on a scale of one to five, don’t define criteria so that lowest (best) cost is rated a one and highest (best) performance is rated a five.
6. Small differences in rating totals may not be significant. Don’t be tempted to assign too much precision to the values.

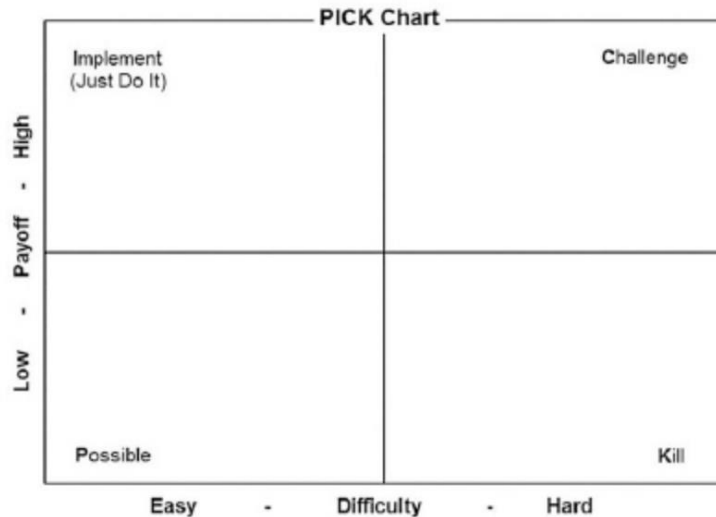
Criteria	Weight	Options			
		Ferrari	Civic	Miata	Caravan
Performance 5 = highest					
Best Cost 5 = lowest					
Safety 5 = safest					
Availability 5 = immediate					
Total					

## PICK Chart

A PICK chart is a Lean Six Sigma tool used to categorize and prioritize improvement ideas. It's sometimes called an effort/impact chart. The chart has four quadrants:

- Possible idea.
- Implement idea.
- Challenge idea.
- Kill idea.

An easy way to create a PICK chart is to draw a 2 x 2 grid either on a whiteboard or a large paper flip chart. Have participants place improvement ideas (written on sticky notes) in the quadrant where they feel the idea best fits.



A PICK chart can be a helpful tool for deciding what to work on first. The ideas in the “implement” quadrant are likely a good place to start. The team can then start looking at some of the ideas in the “challenge” quadrant that are more difficult but have a high payoff. The ideas in the “possible” quadrant are not a priority to pursue, and the ideas in the “kill” quadrant should likely not be considered.

Here are some guidelines for using a PICK chart:

- Don't let participants put their sticky notes between quadrants. They need to decide what quadrant they go in. The beauty of sticky notes is that they can always be moved as the team discusses each idea.
- Keep the PICK chart simple. Don't subdivide each quadrant or allow participants to be strategic about the quadrant they place their sticky note in.
- If participants have trouble putting an idea in the quadrant labeled “kill,” explain that “kill” just means that the idea is hard to do and has a low payoff.

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<https://www.ahrq.gov/patient-safety/settings/hospital/resource/pressureinjury/guide/apb.html>

## About the Author



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**Jeff Oltmann** is a seasoned leader with over 30 years of experience advising clients, managing successful technology programs, and developing new products. His specialties include strategy deployment, operational and project excellence, and project portfolio management. As principal consultant at Synergy Professional Services, Jeff advises leaders and teams in diverse sectors including healthcare, research, bioscience, and technology product development.

Jeff is the founder of the Portfolio and Project Leaders Forum. He is also on the graduate faculty of the Division of Management at Oregon Health and Science University and was previously on executive staff at IBM. He teaches portfolio, program, and project management and is a certified Project Management Professional (PMP®).

Jeff welcomes your questions and ideas. You can contact him at [jeff@spspro.com](mailto:jeff@spspro.com) or read previous articles at [www.spspro.com/article-library](http://www.spspro.com/article-library).

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