Prioritization matrix for teams: impact and effort, with agreed criteria

A prioritization matrix helps a team choose which requests or ideas to act on first by scoring each one for impact and effort and placing it in one of four areas. This kit starts with the step most templates skip: the team agrees what counts as impact and effort before anyone scores, then scores in silence and talks only about the wide disagreements. It includes every sheet blank and filled in for a fictional learning team, an optional weighted tie-break and a 45-minute script.

45 minutes | 3–10 participants | Online and adaptable in person

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The outcome

In 45 minutes the team agrees what counts as impact and effort for this choice, scores 8 to 15 items in silence, settles up to four wide disagreements and places every item on the board. It leaves with a decision for each item, committed days that fit its capacity and one person who tells the requesters.

Before the session

- For team leads and trainers who help a team of 3–10 choose between 8 and 15 existing requests or ideas for a set period. Not a brainstorm.
- With the decision owner, number each item, write it as one line and add rough team days. Find out the capacity in days and who decides if the group cannot agree.
- Print one criteria sheet, score record and board for the group and one scoring slip each, or share the Excel workbook. Choose a scribe.
- Send the list and sheets a day early as plain text for screen readers. Scores are written, not shown by hand; the board uses text, not colour. Passing is allowed and cameras are optional.

Included in this kit

A facilitator run of show, participant worksheets with real tables, reference tables, debrief questions, adaptation notes and a follow-up plan. Use the editable Word copy to tailor examples and prompts before delivery.

Original material by Superglue. Timings are suggestions; adjust them to your participants. This resource has not been independently evaluated.

What is inside

- Criteria agreement sheet
- Scoring slip
- Score record and matrix
- Impact and effort board
- Optional weighted tie-break
- Filled example: weighted tie-break
- Filled example: criteria agreement
- Filled example: impact and effort board
- Filled example: score record and matrix
- Facilitator section: run of show, reference tables, debrief and adaptations

Criteria agreement sheet

Fill this in together before anyone scores. Use up to three impact signals that come from the team's goals for this period. Describe effort in team days where you can. Keep the sheet in view while people score.

Tie rule: when two middle scores differ, use the lower one for impact and the higher one for effort, so that a doubtful item is not ranked too high.

Part	What we agreed
The choice we are making (what, and for which period)	
Impact signal 1	
Impact signal 2	
Impact signal 3 (optional)	
Impact 1 means	
Impact 4 means	
Effort counts as	
Effort 1 means	
Effort 4 means	
Our capacity (days) and the period	
Not in scope today	

Scoring slip

Score each item on your own, in silence, with the criteria sheet in view. Impact and effort each run from 1 (low) to 4 (high). Leave a box empty if you cannot judge an item. Your name is optional.

#	Item (short name)	Impact 1–4	Effort 1–4	Least sure? (tick two)
R1				
R2				
R3				
R4				
R5				
R6				
R7				
R8				
R9				
R10				
R11				
R12				
R13				
R14				
R15				

My reason for the two items I am least sure about

_____

_____

_____

Score record and matrix

The scribe copies every person's scores. Spread is the highest minus the lowest score. Mark items with a spread of 2 or more for discussion. Team score: the middle score, unless the group agreed another. Area: a score of 3 or 4 counts as high.

#	Item	Impact scores	Effort scores	Wide spread?	Team impact	Team effort	Area	Rank	Rough days	Decision	Days now
R1											
R2											
R3											
R4											
R5											
R6											
R7											
R8											
R9											
R10											
R11											
R12											

Impact and effort board

Write each item number in its area. Read the board aloud, one area at a time, starting with Do first.

The impact and effort grid is a widely used planning tool with no single author. The area names and the advice in this kit are its own.

	Effort low (1 or 2)	Effort high (3 or 4)
Impact high (3 or 4)	DO FIRST	PLAN CAREFULLY
Impact low (1 or 2)	FIT IN	RETHINK OR DROP

Optional weighted tie-break

Use this only when two to four options compete for the last days. Take the impact signals from the criteria sheet as criteria, give each a weight from 1 to 3, and score each option from 1 to 4. Score: each score times its weight, added up. Fits: the rough days fit the days left. The score orders the talk; the group still decides.

#	Option	Criterion 1 × __	Criterion 2 × __	Criterion 3 × __	Score	Rank	Rough days	Fits?
A								
B								
C								
D								

Days left after the Do first items

_____

Our choice, and the reason in one sentence

_____

Filled example: weighted tie-break

After the Do first items, 19 days were left. R3 and R7 each needed at least 10 days, so they could not both fit. The team used its three impact signals as criteria. A and C share the top score, but only A fits, so the team chose sessions 1 and 2 of R3 now and moved R7 to the next quarter.

#	Option	Goal link × 3	Staff reached × 2	Fixed date × 1	Score	Rank	Rough days	Fits?
A	R3 Manager essentials, sessions 1 and 2 only	4	2	3	19	1	10	Yes
B	R7 Coaching skills workshop pilot	3	2	1	14	3	10	Yes
C	R3 Manager essentials, all six sessions	4	2	3	19	1	25	No

Filled example: criteria agreement

A fictional learning team of five (lead, two designers, coordinator, HR partner) meets on Thursday 3 December 2026 to choose which of 12 requests to build in January to March 2027.

Part	What we agreed
The choice we are making (what, and for which period)	Which of the 12 requests received by Tue 1 Dec we build between Mon 4 Jan and Fri 26 Mar 2027.
Impact signal 1	It helps one of the three goals in the 2027 people plan. The request names the goal.
Impact signal 2	The number of staff who will use it between January and March.
Impact signal 3 (optional)	A fixed date outside our control falls in the quarter, such as a system going live.
Impact 1 means	Fewer than 20 staff use it this quarter, it serves no plan goal and nothing breaks if it waits.
Impact 4 means	A plan goal depends on it, or most staff use it, or a fixed date falls in the quarter.
Effort counts as	Our team days to design, build and launch, plus help we need from other teams, plus unknowns such as a tool we have not used.
Effort 1 means	Under 3 team days and no help from outside the team. (2 = 3 to 7 days, or one short review from outside.)
Effort 4 means	More than 15 team days, or several other teams, or a tool we have not used. (3 = 8 to 15 days, or regular help from one team.)
Our capacity (days) and the period	40 team days for new build work, Mon 4 Jan to Fri 26 Mar 2027. The rest of our time runs existing courses.
Not in scope today	Running existing courses. Requests that arrive after Tue 1 Dec go to the next round.

Filled example: impact and effort board

The result, in short names. The score record on the next page shows how each item got there.

	Effort low (1 or 2)	Effort high (3 or 4)
Impact high (3 or 4)	DO FIRST R1 Welcome session; R2 Expense e-learning; R4 Captions and transcripts; R8 Complaints refresher; R10 Visitor sign-in job aids	PLAN CAREFULLY R3 Manager essentials; R7 Coaching pilot
Impact low (1 or 2)	FIT IN R5 Spreadsheet sessions; R12 Video newsletter	RETHINK OR DROP R6 Catalogue page; R9 Senior offsite; R11 New learning platform

Filled example: score record and matrix

Five people scored 12 requests. Four had a wide spread; only R4 changed. The team committed 33 of 40 days (Days now) and kept 7 free.

#	Item	Impact scores	Effort scores	Wide spread?	Team impact	Team effort	Area	Rank	Rough days	Decision	Days now
R1	Refresh the new-starter welcome session	3, 3, 4, 3, 3	1, 1, 2, 1, 1	No	3	1	Do first	4	2	Do now	2
R2	E-learning on the new expense system (live 1 Feb)	4, 4, 3, 4, 4	2, 2, 3, 2, 2	No	4	2	Do first	2	6	Do now	6
R3	Manager essentials: six sessions, 14 new managers	4, 4, 4, 3, 4	4, 4, 4, 4, 3	No	4	4	Plan carefully	6	25	Do now	10
R4	Captions and transcripts for the 12 most-used recordings	3, 2, 4, 3, 3	2, 2, 2, 1, 2	Yes: agreed 4	4	2	Do first	1	4	Do now	4
R5	Three spreadsheet lunch-and-learns for finance	2, 2, 1, 2, 3	1, 2, 1, 1, 1	Yes: kept 2	2	1	Fit in	8	2	Do now	2
R6	Rebuild the course catalogue page on the intranet	2, 1, 2, 2, 2	3, 3, 2, 3, 3	No	2	3	Rethink or drop	11	9	Return to requester	0
R7	Coaching skills workshop pilot for 12 team leads	3, 4, 3, 2, 3	3, 3, 3, 2, 3	Yes: kept 3	3	3	Plan carefully	7	10	Next quarter	0
R8	Complaint handling refresher, contact centre	4, 3, 4, 4, 3	2, 3, 2, 2, 2	No	4	2	Do first	3	7	Do now	7
R9	Design a one-day offsite for the senior team	2, 1, 3, 2, 1	3, 3, 2, 3, 4	Yes: kept 2, 3	2	3	Rethink or drop	10	8	Return to requester	0
R10	Two job aids for the new visitor sign-in system	3, 3, 3, 4, 3	1, 1, 2, 1, 1	No	3	1	Do first	4	2	Do now	2
R11	Move all courses to a new learning platform	2, 3, 2, 2, 2	4, 4, 4, 4, 4	No	2	4	Rethink or drop	12	40	Park	0
R12	Monthly video newsletter about learning	1, 1, 2, 1, 1	2, 3, 3, 2, 2	No	1	2	Fit in	9	5	Drop	0

Facilitator run of show

1 Open and name the choice | 3 minutes

Read the choice in one sentence and show the item list. Say: “Today we choose what we do in this period, and what we say not now to. We score each item twice, for impact and for effort. The scores order our discussion. They do not make the decision; [name] has the final say if we cannot agree.” Ask whether any item is missing or two items are the same. Do not add new ideas now; note them for the next round.

2 Agree what counts as impact and effort | 10 minutes

Take four minutes of silent writing on one question: “What would make an item matter more to us in this period?” Read the answers aloud and take three minutes to choose up to three impact signals. Write on the criteria sheet what an impact of 1 means and what an impact of 4 means. Spend three minutes on effort the same way: what counts (our days, help from other teams, unknowns), and what 1 and 4 mean, in days where you can. Confirm the capacity and what is out of scope. Say: “If we disagree later, we come back to this sheet, not to who argues hardest.”

3 Score in silence | 7 minutes

Give five minutes. Each person scores every item from 1 to 4 for impact and from 1 to 4 for effort on the scoring slip, with the criteria sheet in view. There is no middle score, so each score falls on one side of the line. Say: “Leave a box empty if you cannot judge an item; that is a fair answer.” Ask each person to tick the two items they are least sure about and write one reason for each. Take two minutes to collect the slips, or the shared sheet online.

4 Record the scores and settle the wide spreads | 12 minutes

Spend four minutes recording. The scribe copies the scores into the score record or the workbook, about a minute per slip. Meanwhile the group reads the item list in silence and notes which item they expect to divide the group. Then take eight minutes for the items with a spread of 2 or more on either scale, two minutes each, up to four items. Ask the lowest and the highest scorer for one reason each, aloud or read from their slip without their name. Agree a score. If there is no agreement in two minutes, use the median rule and mark the item as an assumption to check. For every other item, use the median rule: the lower middle score for impact, the higher one for effort.

5 Place the items on the board | 5 minutes

Take two minutes for the scribe to write each item number in its area: a score of 3 or 4 counts as high. In the workbook the board fills itself. Take three minutes to read the board aloud, one area at a time, starting with Do first. Ask: “Does anything on the board surprise us? Is anything in Do first only there because we scored it quickly?” Correct a score only with a reason that refers to the criteria sheet.

6 Decide against capacity | 6 minutes

Take two minutes to add the rough days of the Do first items and compare them with the capacity. Take three minutes for what is left: when two items in Plan carefully compete for the remaining days, use the optional weighted tie-break with the impact signals from the criteria sheet, or cut one item into a smaller first part. Then decide each item: Do now, Next quarter, Park, Return to requester or Drop. Take one minute to check that the days marked Do now fit the capacity, and name who leads each Do now item.

7 Read back and close | 2 minutes

Read back the items marked Do now, the days committed and the days left. Agree who tells each requester the decision and the reason, and by which date. Ask each person for one word on how sure they feel about the choice, aloud or in the chat, or a pass.

Reference tables

The four areas of the board

A score of 3 or 4 counts as high. The area names and advice are written for this kit.

Area	Scores	What it usually means	What to decide	The trap
Do first	Impact 3–4, effort 1–2	Worth doing and cheap enough to start soon.	Check the days still fit. Name an owner and a start date.	Filling the quarter with small items until nothing big can start.
Plan carefully	Impact 3–4, effort 3–4	Worth doing but costly. Usually only one fits.	Choose one, cut it into a smaller first part, or move it to a later period.	Starting two big items at once and finishing neither.
Fit in	Impact 1–2, effort 1–2	Useful, small, and easy to over-collect.	Do only when days are left, or batch them into one slot.	A pile of small favours that hides the real priorities.
Rethink or drop	Impact 1–2, effort 3–4	Costly for what it gives this team now.	Drop it, park it with a date, or return it to the requester with a question.	Dropping it silently, so the request comes back louder.

How a team score is set

Spread is the highest score minus the lowest. On a scale of 1 to 4, a spread of 2 means at least two people see the item on opposite sides of the line.

Situation	Rule	From the example
Everyone scores within one point (spread 0 or 1)	Take the middle score (the median). With two middle scores that differ, use the lower one for impact and the higher one for effort.	R1 impact 3, 3, 4, 3, 3: team score 3.
Scores differ by 2 or more (spread 2+)	The lowest and the highest scorer each give one reason, aloud or in writing. The group agrees a score in two minutes.	R4 impact 3, 2, 4, 3, 3: captions are needed by every new starter who uses the recordings, so the team agreed 4.
No agreement after two minutes	Use the median rule and mark the item as an assumption to check before work starts.	R9 kept impact 2 and effort 3; the team asks the requester what the offsite must produce.
More than four wide spreads	Discuss first the items whose discussion could move them to another area. Use the median rule for the rest.	R4, R5, R7 and R9 were flagged; all four were discussed.

Filled example: capacity check

How the fictional team checked its decisions against 40 days of capacity.

Line	Days
Capacity for new build work, 4 Jan to 26 Mar 2027	40 team days
Rough days of the five Do first items (R1, R2, R4, R8, R10)	21 days
Days left before the tie-break	19 days
Chosen in the tie-break: R3 sessions 1 and 2	10 days
Fitted in: R5 spreadsheet sessions	2 days
Committed in total (decision Do now)	33 days
Kept free for requests during the quarter	7 days

Debrief and next steps

Questions for reflection

- Which part of our criteria did we come back to most, and does it need clearer words next time?
- Which wide spread taught us something about an item that we did not know before?
- Which item did we say not now to, and who needs to hear the reason first?
- What would make us change this choice before the end of the period?

Adapt the session

- For three or four people, skip the scribe: each person reads their scores for one item in turn while one person writes. Keep the silent scoring first, so the first voice does not set the score.
- For a 25-minute version, the decision owner drafts the criteria sheet and sends it with the item list a day early. In the session, take three minutes to confirm the criteria, then score, settle up to two wide spreads, place and decide.
- Online, give each person a column in the shared Scores sheet of the workbook and hide the columns until everyone has finished, or collect scores through a form. Read each item aloud before scoring, turn on captions and make cameras optional.
- For quiet participants and people working in a second language, read the written reasons from the slips without names during the spread discussion. Nobody has to defend a score, and an empty box is a valid answer.
- With more than 15 items, ask the decision owner to remove items that are already decided or out of scope before the session, or run two rounds: a quick impact-only score to keep the top 12, then the full matrix.

After the session

Send the board, the matrix and the decisions on the same day. The named person tells each requester the decision and the reason by the agreed date, including for items marked Park or Drop. Put the Do now items into an action plan with owners and dates. Look at the matrix again halfway through the period: change only items whose criteria have changed, such as a new deadline, and record why.

Questions people ask

What is a prioritization matrix?

A grid that sorts items by two scores, usually impact and effort, into four areas: do first, plan carefully, fit in, and rethink or drop. It helps a team see its options side by side and say not now to some of them on purpose. The scores order the discussion; people still make the decision.

How do we agree what counts as impact?

Before scoring, write down up to three signals that make an item matter more in this period, taken from the team's goals, and describe what an impact of 1 and of 4 looks like. Do the same for effort, in team days where you can. When people disagree later, they point to the sheet instead of arguing from rank.

Why score from 1 to 4 and not from 1 to 5?

A four-point scale has no middle, so every score falls on one side of the line between low and high. The median rule handles the rest: with two middle scores that differ, impact takes the lower one and effort the higher one, so a doubtful item is not ranked too high.

Is this the Eisenhower matrix?

No. The urgent and important matrix is commonly attributed to Dwight D. Eisenhower and was popularised by Stephen Covey's The 7 Habits of Highly Effective People (1989). It suits personal task lists. This kit uses impact and effort, which suits a team choosing between requests or projects for a period.

How is this different from the problem solving activities kit?

The problem solving activities kit runs a 90-minute workshop from facts to causes to one tested option, and its option comparison weights four fixed criteria. This kit starts from a list that already exists, adds the criteria agreement and silent scoring, and checks the choice against capacity. Its weighted tie-break is short and optional, for the last few days only.

What is included in the free and editable files?

The open PDF has the criteria agreement sheet, the scoring slip, the score record and matrix, the impact and effort board, the optional weighted tie-break, a filled example of each and the 45-minute script. Subscribers also receive the editable Word file, an Excel workbook that calculates medians, spreads, areas, ranks and the capacity check, and a CSV of the example matrix.

Use and sharing

Free to use and adapt in your own training sessions, including paid client work. Do not resell or redistribute the unmodified download as a standalone product. Share the resource page instead.