

# Strategy Triage Tool

## Instructions for Group Process

1. Share screen with tool and introduce exercise.
2. Work together to establish the guiding question. Be sure the guiding question does not preemptively assume a strategy or a responsible party. If there are multiple guiding questions, just list them. Don't force consensus.
3. Inviting people to hold the question in mind, facilitate folks to sort their current programs, strategies and major activities into the five boxes. If they have trouble placing an "item," put it in Unknown. Encourage folks to hold off on problem solving how they will shift or do X, and rather to simply map the items onto the boxes. Be strict about this boundary, and gently communicate it as often as needed. Emphasize flexibility about the time frame for the "pause" box—could be longer or shorter—but insist gently that it needs to be longer than 3-4 months. It may take several prompts of "what else" to complete the sorting. Be gentle throughout. Everything but the emergent box is probably associated with loss. (Crying is appropriate!)
4. Once everything is mapped, ask folks to "step back," review, and explore for insights, themes, patterns, etc. This is the meaning making time. You can invite silent reflection or journaling. You might consider beginning the discussion with a round robin of reflection. Whichever way you do it, collect and synthesize insights.
5. Invite folks to prioritize what needs to be attended to over the next two weeks. (Right now, two weeks is almost a mid-term time boundary.) This can be done by having each person, on their own, "choose" what they think should be prioritized, and then share and consolidate through consensus. No more than five items should be selected. (As participants share their priorities, I put their initials, in bold, next to each item they select, along with any notes they offer as to why it is important or how they think it should be approached.)
6. Highlight items the team agrees to. Encourage them to think about what pieces of "unknown" are urgent to explore or solve.
7. Facilitate a quick distribution of responsibility/work planning. Encourage folks to be flexible about their roles (and their expectations about their own and other people's roles) and to build in redundancy by pairing up and creating a central repository of notes, documents, and contacts. Pairing up is important, as people may get sick or need to attend to family or be asked to take on other job responsibilities. (It's your call whether you say this explicitly.)
8. Facilitate a reflection on the process. Probe for feelings. Synthesize.
9. Close with encouragement.

