

## Quick Guide to Decision Making

### *Involvement and Engagement – Valuing Those We Lead*

The Quick Guide is a tool to be used in collecting and using the input of others in making decisions. It includes both a structured thought-flow process, as well as a worksheet that guides you through specific action steps.

#### Instructions and Tips

- 1. Name the pending decision or issue** – Make it clear and succinct and framed as a question.
- 2. Prepare for Engagement** – A six step planning process (Quick Guide 2a.–2f.) will assist you in involving and engaging those you lead in the decision under consideration.
  - **Define limits to and opportunities for participation.**  
Challenge yourself to incorporate as much engagement as possible; this may require you moving beyond what you find “comfortable,” at least initially. Be careful to name the limits to participation and explain the reasons for those limits.
  - **Analyze issue for impact and emotional attachment.**  
Ask the question, “Whose work will be affected by this decision?” and “To what extent are people emotionally attached to it?” Think along vertical and horizontal axes. Create a list of all those affected.
  - **Describe context and/or big picture.**  
To productively engage someone in decisions, they must be given facts, perspectives, assumptions, trends, and anything relevant to the decision that they don’t currently have access to.
  - **Write questions.**  
*With regard to any given decision, collect input using these four questions.*
    - How will this affect your work?
    - How do you feel about this decision?
    - What else do you know that would help us make the best decision?
    - What specific suggestions do you have regarding this decision?
  - **Anticipate triggers.**  
Anticipating reaction ahead of time and having a plan for how you will channel that reaction to a productive end is an important part of your planning. Vigorous debate is necessary and valuable and should not be avoided. You may wish to set ground rules for respectful discourse, learn when to redirect or bring such discussion to a close when they become nonproductive, or consider when to have individual discussions where initial responses can be contained.
  - **Determine needed support.**  
Seek support in advance from key constituency groups. You may also want support during the process of involving others. A second person in attendance with a specific role: taking notes, fielding questions, offering a high-level perspective, providing data, etc., may prove helpful.
- 3. Engage!** – Execute your plan and collect the needed input.
- 4. Make your decision** – Use the input provided.
- 5. Explain your decision** – Go back now and explain the decision you made to those you involved. The goal is to be as transparent as possible. Include what the decision was, why you made the decision you did, how you used their input, and whether or not there are any new expectations of them as a result. This may include things like new standards, targets, workflows or timelines. Be sure to identify the consequences of meeting or failing to meet the new expectations.

# Quick Guide to Decision Making

## 1. Name the pending decision

## 2. Prepare for Engagement

2a. **Set limits** – Does this decision involve confidential matters that will prevent others from engaging with you in addressing it?

YES – If yes, stop and frame an explanation to be communicated.

NO – If no, proceed to the next step.

What are the givens related to this decisions? (That is, what has already been decided and is not negotiable?)

If the issue requires privacy or confidentiality or if time or other factors prohibit participation, is there opportunity to give input to implementation?

YES – If yes, describe the needed input.

NO – If no, proceed to #5 and craft an explanation.

2b. Use the matrix on Page 2 of the Involvement and Engagement booklet (Figure 1.) to analyze the decision regarding degree of impact and associated emotion; build your I & E strategy.

Who will you engage? Identify your constituency: groups and individuals based on degree of impact and emotional investment.

How will you engage them and when?

What existing venues can be used?

Who will receive a 1:1?

Where is there a need to engage but where no venue exists?

What approach will meet that need?

***Think vertically as well as horizontally, above you and below.***

2c. What contextual or big picture information will participants need to understand to make a meaningful contribution?

Internal:

External:

2d. Frame your important questions in four categories.

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How will it affect your daily work?

How will it make you feel?

What else do you know that would help us/me make the best decision in terms of what is most important to our patients and customers?

What specific suggestions do you have regarding this decision?

**2e. Triggers**

What do you think will trigger anger, heated debate or criticism?

How will you create an environment that supports dialogue under these circumstances?

**2f. What support do you need in addressing these issues?**

**3. Engage!** Execute your plan.

**4. Make your decision**

**5. Explain your decision**

5a. Identify who is to receive this explanation.

5b. When and how will this be communicated?

5c. What decision did you make?

5d. Why this decision?

5e. What input were you able to use in making your decision and how did it help you?

5f. What input were you not able to incorporate into your decision? Why were you not able to use it?

5g. Are there any new expectations?

If you have questions regarding this material, please email [Cheryl.A.MagnusonGiese@HealthPartners.com](mailto:Cheryl.A.MagnusonGiese@HealthPartners.com)

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