



STRATEGY TRIAGE TOOL

Re-establishing priorities during the COVID-19 Crisis

Suggested Approach

Use this planning exercise to promote engagement and establish work priorities with your team. During times of change, this tool can help refocus team or individual priorities. This tool can also be used if there's a specific project you're working on, or it can be used for personal professional development.

While completing the exercise, remember to take a moment to pause and recognize how you or your team might be feeling – it could be stressful for some or inspiring for others. It's important to acknowledge the impacts of re-establishing priorities during a crisis.

1 Introduce Your Team to the Exercise

If completing the exercise as a team virtually, share the tool on your screen. You can also email the exercise to team members to complete ahead of time.

2 Work Together to Establish Your Team or Project Mandate

This can be in the form of a guiding question. The question should be opened-ended and future focused. Example: What is the team trying to achieve? What will it take to complete the project? Where is the project heading? Be sure to keep the questions broad – avoid yes or no answers.

Alternatively, this can be in the form of a statement. Example: Enabling service delivery; Offering expert advice on organizational design and classification, etc.

If there are multiple guiding questions or statements, be sure to list them all. The goal of this exercise is to listen to employees and that can mean multiple ideas.

3 Sort and Organize

Invite team members to sort/organize their current projects, responsibilities, and major activities into the five boxes below.

If team members have trouble placing an item, add it to the Unknown box. Avoid problem solving at this step, and take the time to sort the items into the boxes.





4 Review and Adjust

Once each item is sorted, team members can reflect on each item and discuss. As a result of reflection and discussion, some items might be added to different boxes. Be sure to take notes from the group discussion in order to collect and synthesize insights. This process might have to be repeated once or twice.

5 Prioritize Items

Through group discussion, ask team members to determine which items should be prioritized and actioned within the next two weeks. This can be the team's current priorities (active items) or emergent priorities. No more than five items should be selected.

6 Review Unknown Items as a Group

Encourage team members to think about which items in the Unknown category are urgent to explore or solve.

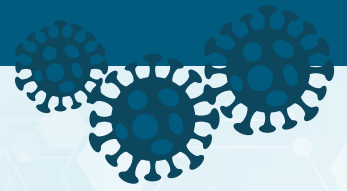
7 Determine Responsibilities

Facilitate a quick distribution of responsibilities in relation to selected items. Encourage flexibility of roles/expectations and encourage team members to work together.

8 Reflect on the Process as a Team

Ask team members how they felt about the activity. It is normal to feel emotions or loss during this process. Take the time as a team to reflect on these emotions. Example: Has this activity helped to re-focus team goals/priorities? Am I disappointed that my project has been reprioritized? Practice open-hearted listening as a group: give people the space to share how they are feeling, without judgment or a need to change or fix their feelings.





Please complete the exercise below

Current Priority

(still relevant, continues forward)

These items will move forward, however perhaps not as planned.

Pause and Resume

(when crisis is over)

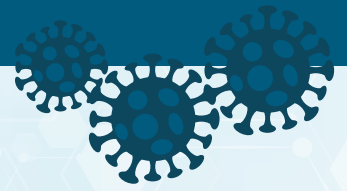
These items will be paused longer than 3-4 months because they are either not feasible now, or need to be paused to make room for emergent priorities.

Emergent Priority

(due to new conditions/reality)

These items are new or newly prioritized because of current conditions. They are potentially now more necessary or urgent and take priority.





Unknown Status

(need more information)

These items are unclear or in too much flux to decide. These items might require more direction from management.

Honour and Let Go

(not going to happen)

Conditions have made these items impossible to complete.

Inspired from : [Reimagining Strategy in the Context of the COVID-19 Crisis: A Triage Tool](#)

