

PLANNING MATRIX

What it is:

A planning matrix is a diagram that shows specific tasks needed to complete an activity, the persons or groups responsible for completing the tasks, and the schedule by which the tasks must be completed.

When to use it:

Because a planning matrix links activity to responsibility and schedule, it is useful in many quality-planning and quality-improvement steps. It can be especially useful in steps such as planning the project, testing theories, designing remedies, and developing implementation plans.

How to use it:

Begin with a tree diagram. Use the right-hand branches to identify all the tasks required to complete a specific activity.

Add two columns to the right of the activities. Label the columns *Who* and *When*.

Assign responsibility. Discuss and identify the most appropriate person(s) or group to complete the task. Write names on adhesive notes and attach them next to the proper activity.

Determine schedule. Agree on necessary completion dates for each task. Write dates on adhesive notes and post them in the *When* column next to the appropriate activity.

Finalize the matrix. Make sure the team is in agreement on both the assignment of responsibility and the scheduled completion date for each task. Transfer the matrix to standard paper.

Agree on a process to track progress. Determine whether the team leader or the team as a whole is responsible for monitoring work completion. Establish a reporting mechanism to ensure timely and accurate accounting of work performed. Refer to the planning matrix often.

Planning Matrix Example

