Who / What / When Matrix

Why Use this Approach:
I have attended countless meetings in my career; I imagine you have as well. Have you ever left a group discussion and realized that no one identified any actions to take? When I leave such a meeting, I wonder if I should have spent that time working on something more productive.

In contrast, I feel good about a meeting in which the attendees created a list of actions items. I leave that meeting feeling like we accomplished something of value. A “to do” list puts into action the attendees’ decisions, sustains project momentum, and guides the team’s short-term work effort. Philosophically, meetings seem best for “thinking” and the time in between meetings seems best for “doing.” An action list from a meeting helps the project team get that “doing” done.

As a team works through a facilitated meeting agenda, items are added to a “to do” or action list that everyone can see. However, this step is only half of what is necessary. Too often, action list items are not equitably assigned to attendees. Expected completion dates may be missing as well.

The “Who / What / When Matrix” overcomes these challenges. This technique respects the workload of team members and sets an expectation for each action item due date.

Who Should Be Involved: Who should be involved? This technique is most effective when everyone attending a team meeting is involved in developing the action items.

What You’ll Need:
Here are the resources you need to use this facilitation technique.

1. A meeting facilitator or an assistant who can accurately and succinctly record action items during the meeting
2. Space on a dry erase board or flip chart page where the action items can be written; you can also use an electronic spreadsheet projected on the wall
3. Separate space available for writing the Who / What / When matrix, preferable right next to the list of action items

How to Prepare:
How should you prepare to use this facilitation technique?

1. When requesting the time of team members from the project sponsor, be sure to include a time estimate for the project team’s work between meetings.
2. As you kick off the project, set the expectation among team members that work outside of meetings is critical to project success. It may be necessary to gently remind each team member of this requirement once or twice in the early stages of the project.
3. Include an item in the meeting agenda called “Action Items – Who / What / When” with roughly 10 minutes allocated for it.
4. During the meeting, the facilitator or an assistant will listen for action items and will write them down for all attendees to see.

Procedure to Follow:

This facilitation technique includes the following steps.

1. Start from the action list created during the meeting. Ask the attendees to clarify any items. Invite them to identify additional tasks that should be added to the list.
2. Sequentially number each of the items in the action list.
3. On an adjacent flipchart or dry erase board, create a grid with three columns, “Who,” “What,” and “When.” In a spreadsheet, create this grid in a second workbook and display it alongside the action list. Write the name of each attendee vertically in the “Who” column. Leave enough vertical space in order to write two or three tasks in the “what” column for each attendee.
4. Ask attendees about which of the work items they can commit to completing. Rewrite in the “What” column the appropriate action item (or simply list the number of that action item next to the person’s name).
5. It will become obvious that some attendees have no work items. Invite those attendees to assist those who appear to have a significant workload. Help the attendees identify difficult or time-consuming tasks on the action list. Invite those attendees who have a light workload to help.
6. Ask the attendees to identify the date on which each task should be completed. The group may identify some interdependencies among the tasks, which may require some revision to the “When” dates.
7. Capture the hand-written action list and “Who / What / When” grid content with a photo. Distribute the photo or post it to a team workspace. Of course, if you've used a spreadsheet, you simply have to send that out electronically, or post it to a team work space.

Rules:

Here are some recommendations for using this facilitation technique effectively.

1. Carefully monitor elapsed time during the meeting; leave 5 – 10 minutes to develop the “Who / What / When Matrix.”
2. Check-in with attendees by phone before due dates arrive. It helps to ask each person whether he or she needs assistance, or needs a barrier removed in order to complete the assigned task on time.

Notes:

Adapted from *Game Storming* by Dave Gray, Sunni Brown, and James Macanufo; O’Reilly Media, Inc; 2010