Defensive Fundamentals:

Operating with Clarity in Constrained Times and Building Your Personal Playbook for Getting Work Done

UBC Summer Knowledge Share 2026
June 9, 2026

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Presenters

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Grant Management Experience

Strategic Planning & Project Management Experience

What is UBC?

University Business Consulting (UBC) is an internal George Mason University unit of trusted advisors focused on innovation, turning data into insights, and improving operational efficiencies, all in pursuit of the university's overarching strategic goals.

Using our **experience in higher education**, **project management, analytics, and strategic planning**, we work alongside our George Mason clients to devise solutions that **support them in reaching their goals** across the university.

UBC is located within the Office of the President.

https://consulting.gmu.edu/

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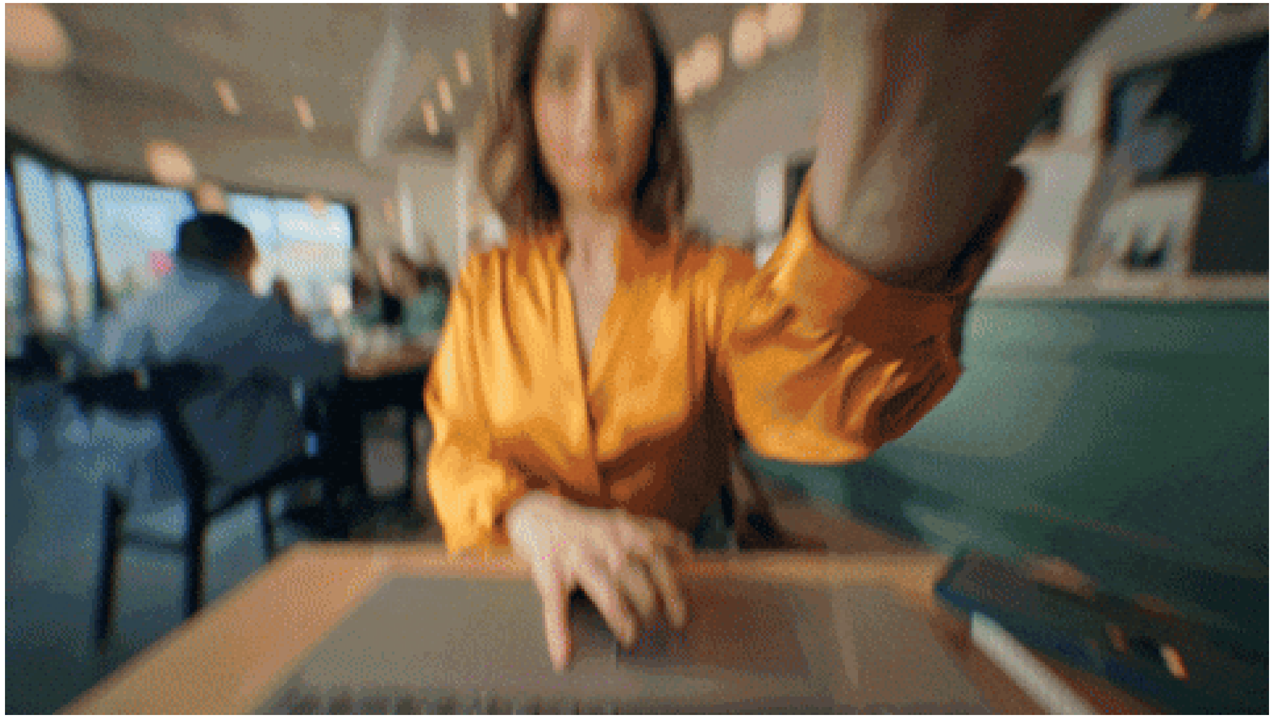
If Everything Feels Urgent, You're Not Alone

Too many requests, shifting priorities, and unclear ownership can turn everyday work into constant chaos.

This workshop will provide you with simple tools to help you regain clarity and build more consistent ways of working.



TODAY'S PURPOSE:
Build your personal playbook for getting work done.

By the end of this session, you will have the start of your own **Defensive Fundamentals Playbook:** a practical set of tools to help you manage competing demands, reduce confusion, and work more consistently.

This session is not about adding more work.
It is about building simple systems that help you make decisions faster and work with greater clarity.

What is a Defensive Fundamentals Playbook?

A **Defensive Fundamentals Playbook** is a practical collection of tools, templates, and habits you can use when work feels busy, unclear, or reactive.

What to include:

- A go-to **prioritization** method
- **Role clarity** tools for your context
- Checklists or templates for **recurring** work
- **Shortcuts** for common decisions

What your playbook should be:

- **Personal:** Tailored to YOU and YOUR work right now
- **Practical:** Easy to reference
- **Simple:** Short, usable, and focused
- **Accessible:** Stored where you already work

Goals for Today's Session

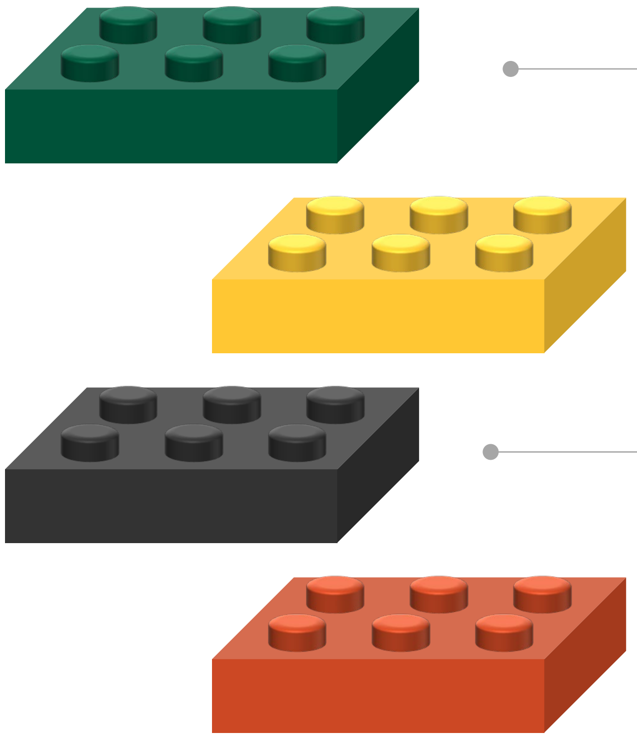
1 Discover (or rediscover) practical tools to **identify what is urgent, prioritize competing demands, clarify roles and responsibilities, and standardize your day-to-day work.**

2 Determine which tools and approaches **align best with your specific work context and challenges.**

3 Define next steps for **using and maintaining your Defensive Fundamentals playbook.**

What You’ll Build Today

Today, you will begin building your personal Defensive Fundamentals Playbook grounded in **four fundamentals:**



Triage & Prioritize
Decide what needs attention first when things feel urgent!

Establish Operational Clarity
Clarify roles, ownership, and decision-making.

Build Repeatable Processes and Systems
Reduce rework by documenting or automating recurring tasks.

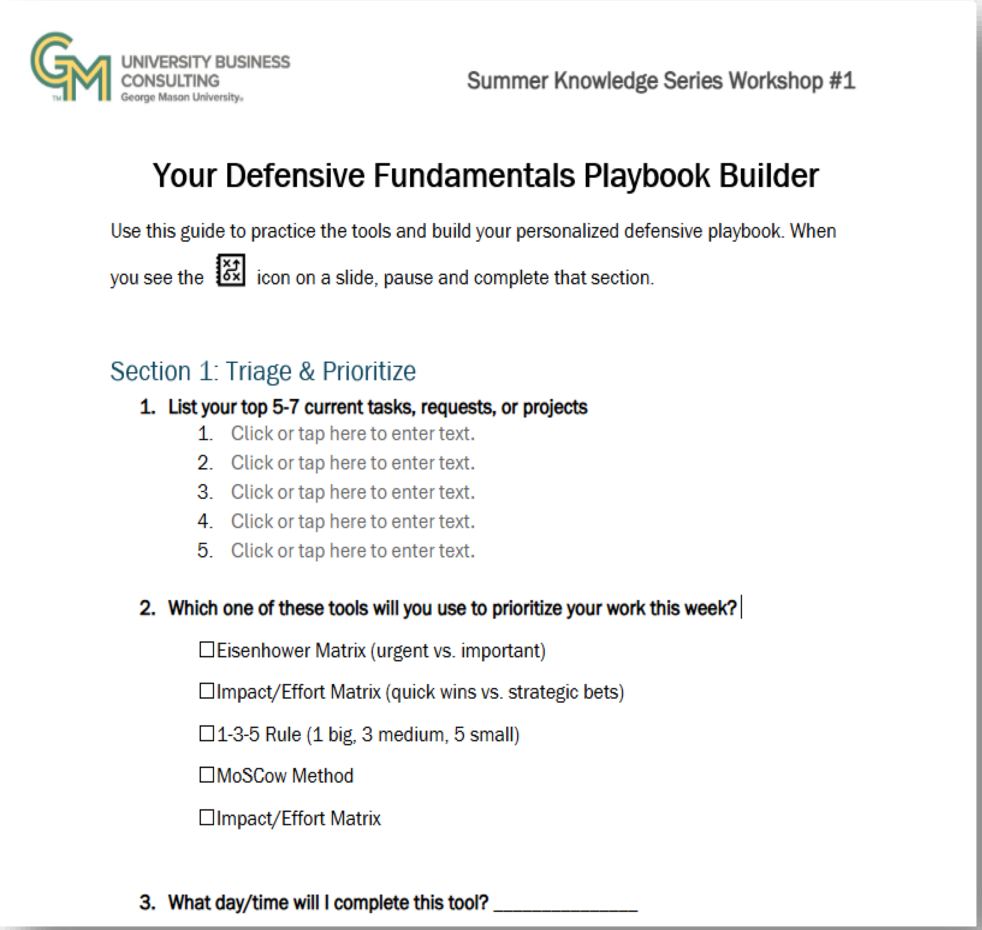
Continuous Improvement
Keep your tools and habits current as work evolves.

How This Session Works

During this session, use the **Defensive Playbook Builder** template to practice the tools and create your personalized playbook.

When you see the icon on a slide, pause for 2 minutes to complete the section in your Defensive Playbook Builder.

The Playbook template is attached to today's calendar invitation.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Summer Knowledge Series Workshop #1

Your Defensive Fundamentals Playbook Builder

Use this guide to practice the tools and build your personalized defensive playbook. When you see the icon on a slide, pause and complete that section.

Section 1: Triage & Prioritize

1. **List your top 5-7 current tasks, requests, or projects**
   1. Click or tap here to enter text.
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   3. Click or tap here to enter text.
   4. Click or tap here to enter text.
   5. Click or tap here to enter text.
2. **Which one of these tools will you use to prioritize your work this week?**

   ☐Eisenhower Matrix (urgent vs. important)

   ☐Impact/Effort Matrix (quick wins vs. strategic bets)

   ☐1-3-5 Rule (1 big, 3 medium, 5 small)

   ☐MoSCow Method

   ☐Impact/Effort Matrix
3. **What day/time will I complete this tool?** ______________

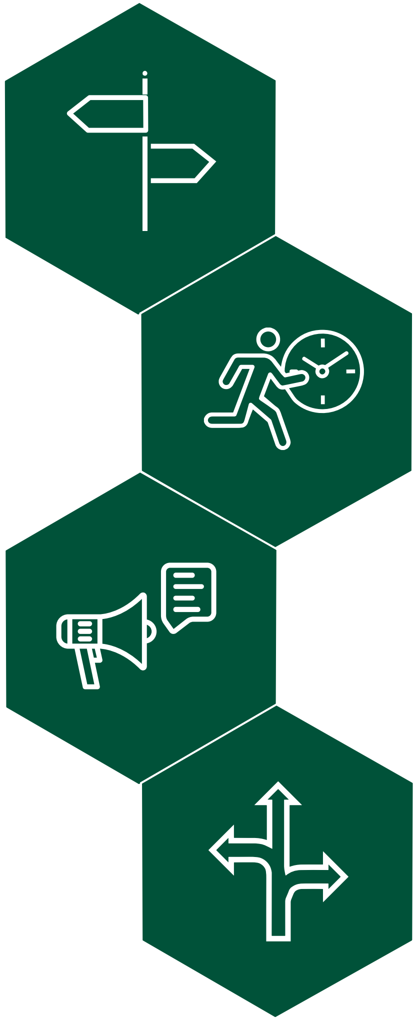
Section 1: Triage & Prioritize

*How to decide **WHAT** to work on when everything feels urgent*

The Challenge

When everything feels URGENT, you can fall into common traps:

Decision paralysis for competing priorities



Chasing short-term wins

Saying yes to whoever asked last or loudest

Losing time between switching tasks

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Two Steps: Triage and Prioritize

Triaging and Prioritizing work together helps you focus on high-value work and avoid getting stuck on low-impact tasks.

Step 1: Triage "The Now"

Triaging helps you quickly sort incoming work based on **urgency, risk, and required action.**

Goal: Decide what needs **immediate attention today**.

Timeframe: Immediate (minutes to hours).

Step 2: Prioritize "The Next"

Prioritizing helps you decide when a task should be completed based on **impact, timing, and available capacity.**

Goal: Organize your tasks to ensure tasks and goals are completed.

Timeframe: Scheduled (days, weeks, or quarters).

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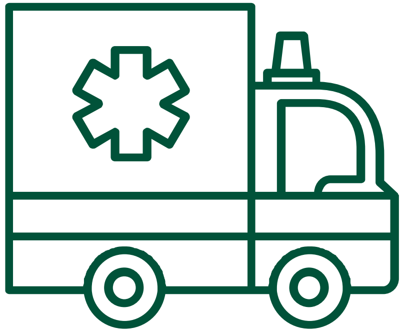
Step 1: Triage "The Now"

Triage helps you quickly sort incoming work and **make fast, confident decisions about what deserves your attention right now**

Tools	Use When You Need To…
Eisenhower Matrix	Distinguish between what's **urgent** and what's **important**
Importance, Complexity, and Urgency	**Compare tasks** when everything feels like a **priority**
1-3-5 Rule	Plan your day based on **realistic capacity** *(1 big, 3 medium, 5 small tasks)*

For more in-depth descriptions of these tools, please see the appendix slides.

Tool Deep Dive: **Importance, Complexity, and Urgency**



I	**Importance**
C	**Complexity**
U	**Urgency**

The ICU framework is a prioritization and decision-making tool. It helps individuals or teams evaluate work based on impact, effort, and time sensitivity, ensuring resources are focused on the right priorities at the right time.

Importance: Measures the overall value, impact, or strategic significance of a task, initiative, or decision. High-importance work contributes directly to key goals and outcomes.

Complexity: Assesses the level of effort, coordination, risk, or problem-solving required. More complex work may require additional planning, expertise, or cross-functional collaboration.

Urgency: Evaluates how quickly action is needed based on deadlines, business needs, dependencies, or potential consequences of delay.

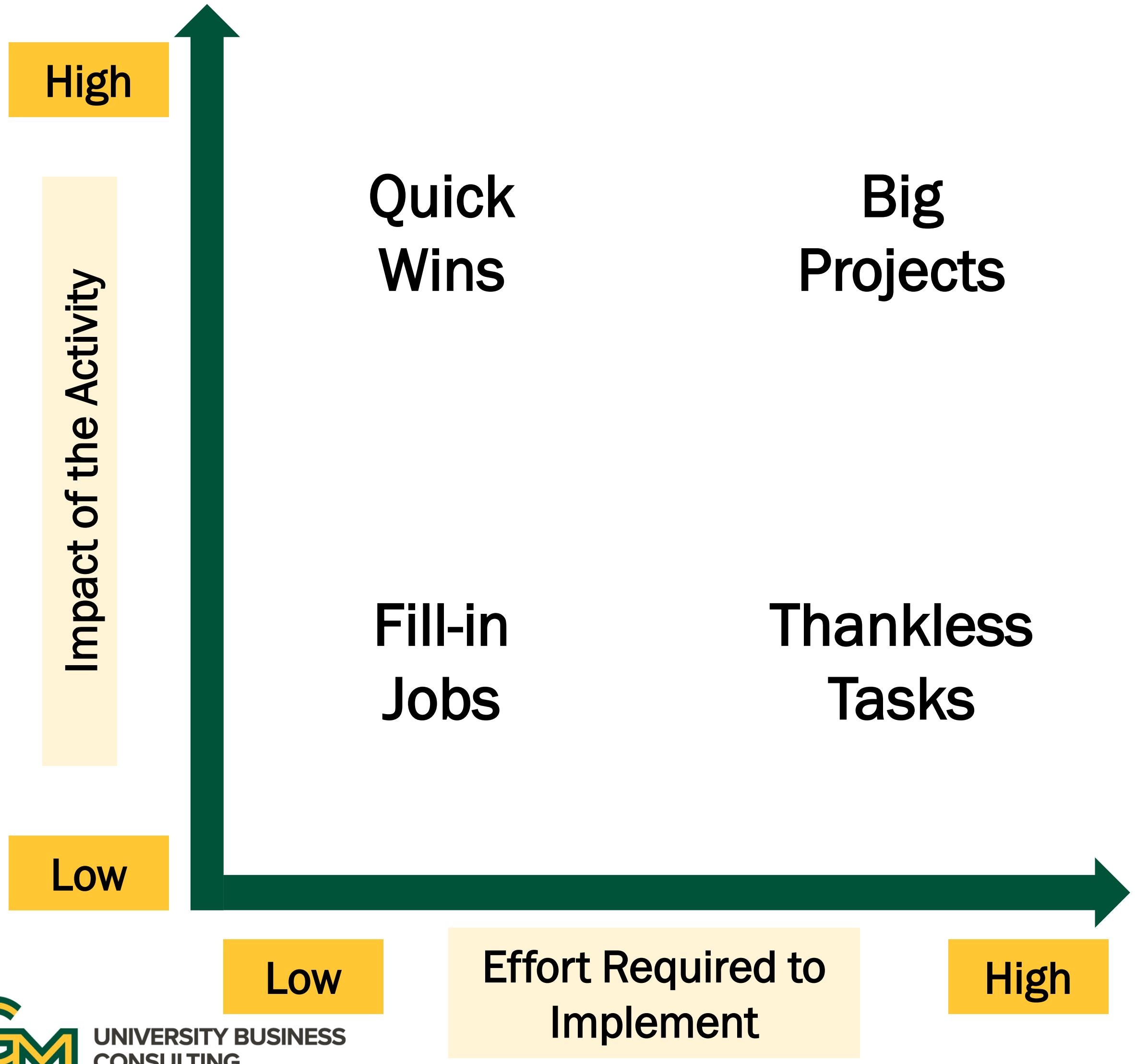
Step 2: Prioritize "The Next"

Prioritization helps you decide what order to complete your tasks based on your goals, capacity, and tradeoffs.

Tool	Use When You Need To...
MoSCoW Method	Align on what's essential versus nice to have with a group of people
Impact/Effort Matrix	Find quick wins and decide what's worth investing time and resources into

For more in-depth descriptions of these tools, please see the appendix slides.

Tool Deep Dive: Impact/Effort



The matrix helps you focus on which tasks **delivers the most value for the least effort,** ensuring smarter prioritization.

- **Quick Wins:** Do these first; great for building momentum.
- **Big Projects:** Strategic, long-term initiatives that require planning and time; worth pursuing but not quick fixes.
- **Fill-Ins:** Nice to have, so you can do them when time allows, but you don't need to prioritize; provide small incremental benefits.
- **Thankless Tasks:** Lowest priority and you can generally skip, if you can; they drain resources without meaningful return.

Your Turn!

In your **Defensive Playbook Builder**, find **section 1.**

- Complete Question 1 (*List 5-7 current tasks*)
- Review the types of prioritization tools in the Appendix, and then answer Question 2 (*Which one will you use*?)
- In Question 3, commit to a specific time when you'll use this tool to help yourself/your team prioritize

Section 2: Operational Clarity

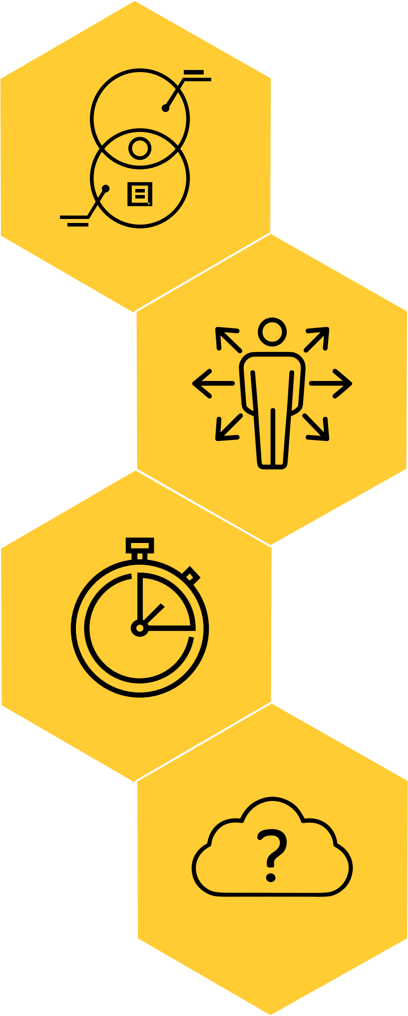
How to clarify roles, ownership, and decision-making

The Challenge

Do any of these situations sound familiar to you?

Tasks are duplicated or dropped

People assume someone else is handling it



Decisions are delayed

Ownership is unclear

Operational Clarity Tools

Operational clarity tools help you define roles, align stakeholders, and agree on how work gets done.

Tool	Use When You Need To...
RACI Matrix	Clarify who is Responsible, Accountable, Consulted, and Informed on a task
Project Charters	Align on scope, goals, deliverables, and roles with a group
Timeline/Project Plan	Sequence work and assign ownership over time
Stakeholder Map + Engagement Strategy	Manage communications and set expectations with a group
Decision Tree	Map out decision paths and identify escalation paths

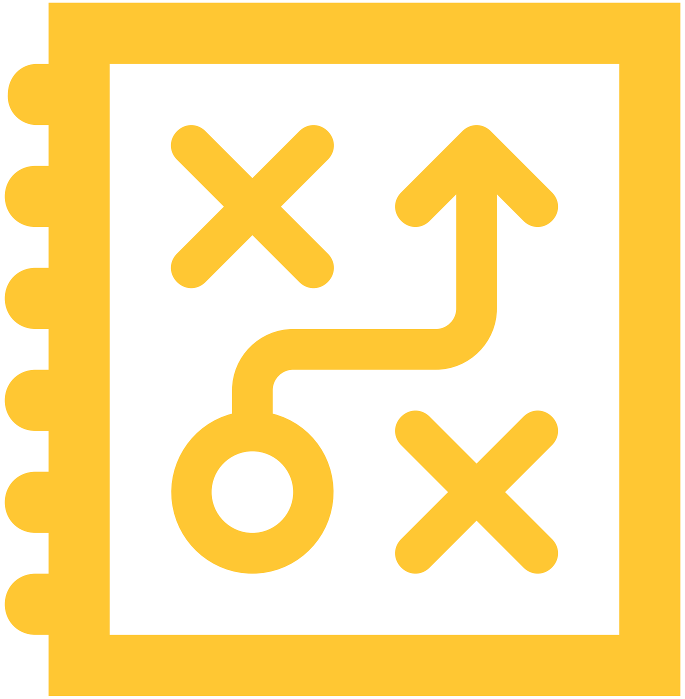
For more in-depth descriptions of these tools, please see the appendix slides.

Tool Deep Dive: RACI Matrix

Strategic Planning RACI Matrix

Responsible (R) – Does the work **Accountable (A)** – Final approval/ authority; every column should have <u>one</u> accountable person **Consulted (C)** - Provides input **Informed (I)** – Kept updated	**Strategic Plan Framework** Establish Governance	Conduct environmental scan	Develop Mission, Vision & Values	Develop guiding principles and definition of done	Develop Strategic Pillars & Outcomes	Finalize Strategic Planning Framework
Sponsor				R		
Strategic Planning PM Team	A	R	A	A	A	A
Steering Committee	R	C	R	R	R	R
Pillar Working Groups			I	I	I	
Stakeholders (Student, Faculty, Staff, Alumni)		C	C		C	

Your Turn!



In your **Defensive Playbook Builder**, find **section 2.**

- Complete Question 1 (*One task/project where roles need clarity*)
- Review the types of role-clarifying tools in the Appendix, and then answer Question 2 (*Which one will you use*?)
- In Question 3, commit to a specific time when you'll use this tool to help yourself/your team clarify roles and responsibilities

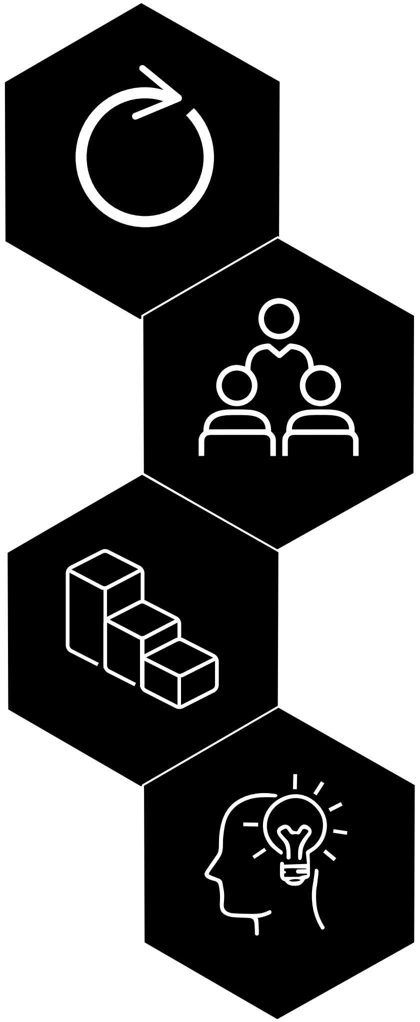
Section 3: Build Repeatable Processes and Systems

How to reduce rework and make recurring work easier

The Challenge

Do these sound familiar to you?

The same task is recreated each time



Onboarding depends on asking one person

Important steps get missed

Quality varies depending on who does the work

Repeatable Processes & Systems Tools

These tools help you **create consistency, reduce errors, and make routine work more efficient** by documenting repeatable steps.

Tool	Use When You Need To...
Checklists	Ensure routine tasks are completed consistently overtime
Templates	Standardizing recurring documents and communication
Standard Operating Procedures	Document tasks that require consistency or handoffs across people
Process Mapping	Understand and improve workflows or identify bottlenecks
Intake Form/ Request Tracker	Manage and track incoming work consistently

For more in-depth descriptions of these tools, please see the appendix slides.

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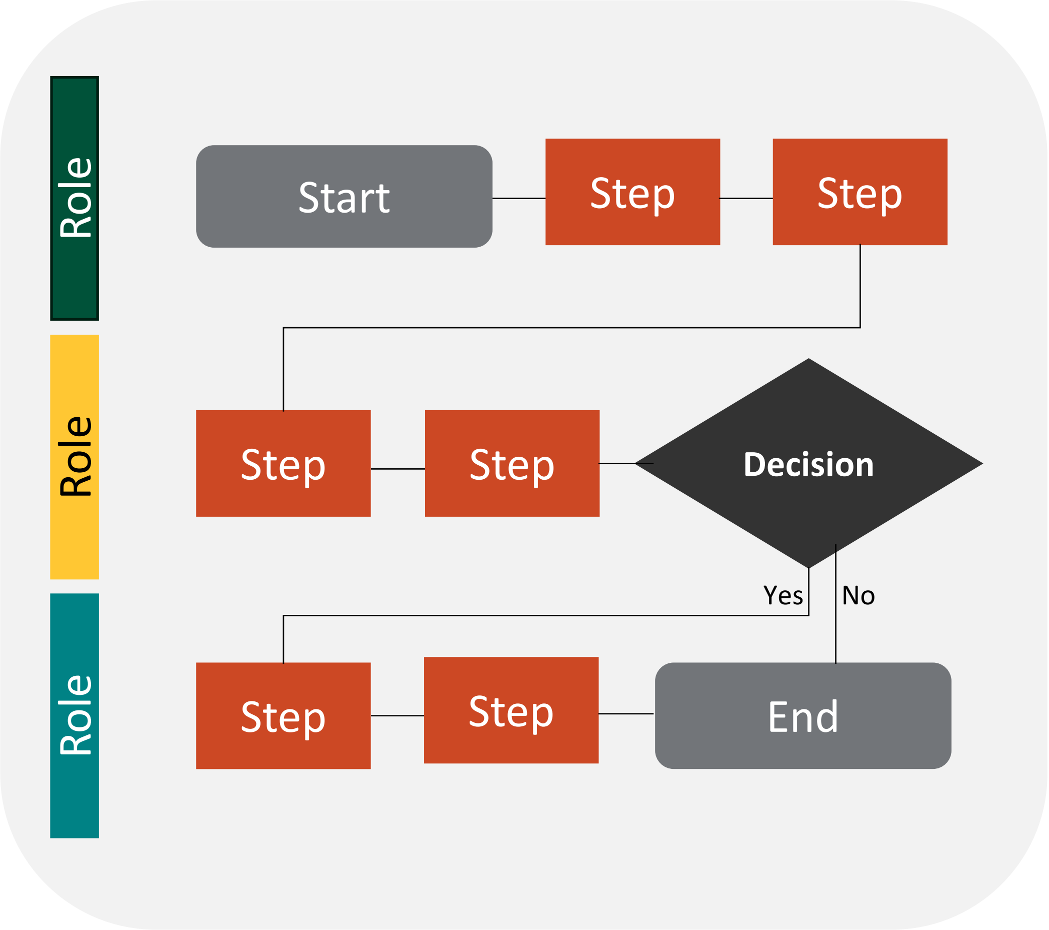
Tool Deep Dive: Process Mapping



Process mapping is a tool for clarity and shared understanding. It takes complex, often messy workflows and turns them into a shared visual story, making it easier to improve, standardize, and execute with confidence.

Visualizes the Workflow: Lays out each step in a process from start to finish, making workflows easier to see and understand.

Clarifies Roles and Handoffs: Shows who is responsible at each step and highlights where work is passed between people or teams.

Identifies Gaps and Inefficiencies: Reveals bottlenecks, delays, or redundant steps. Helps pinpoint where things break down.

Supports Improvement: Serves as a foundation for refining processes and helps move from reactive to more structured, repeatable workflows.

AI Assistant: Your Playbook-Building Partner

Patriot AI

PatriotAI is a suite of six AI agents co-developed with the Mason community, offering secure, university-managed access to support learning, teaching, research, and administration.

Microsoft Copilot

Copilot helps George Mason faculty, staff, and students work more efficiently; from drafting content and analyzing data to summarizing documents and answering complex questions.

zoom AI Companion

Zoom AI Companion helps you work smarter with real-time AI support in **Meetings, Recordings, and Whiteboards.**

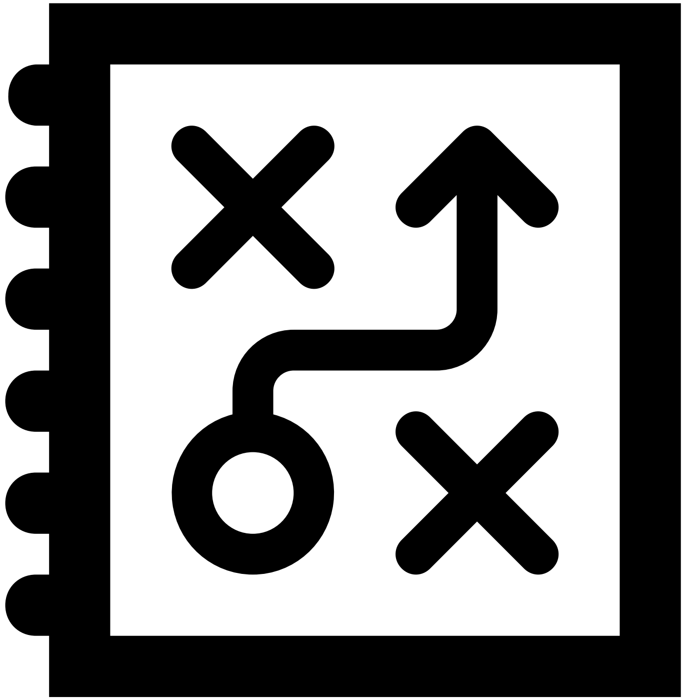
Important: Use AI to accelerate drafting and reflection, but always review outputs for accuracy, tone, privacy, and institutional context.

Build Repeatable Processes and Systems with AI

Use these prompts to help you turn recurring work into reusable checklists, templates, SOPs, process maps, and request trackers.

Checklists	• Create a step-by-step checklist for onboarding a new staff member in my department.
Templates	• Create a reusable template for a weekly division update email that a department leader can send to staff.
Standard Operating Procedures	• Write a step-by-step SOP for processing student travel reimbursement requests in a university office.
Process Mapping	• Map the current process for approving a new academic program proposal from initial concept through final approval.
Intake Form / Request Tracker	• Design an intake form for faculty and staff who request communications support for events, announcements, or student-facing campaigns.

Your Turn!



In your **Defensive Playbook Builder**, find **section 3.**

- Complete Question 1 (*One task that is repeated but inconsistent*)
- Review the types of tools in the Appendix, and then answer Question 2 (*Which one will you use*?)
- In Question 3, commit to a specific time when you'll use this tool to help yourself/your team enhance consistency and efficiency

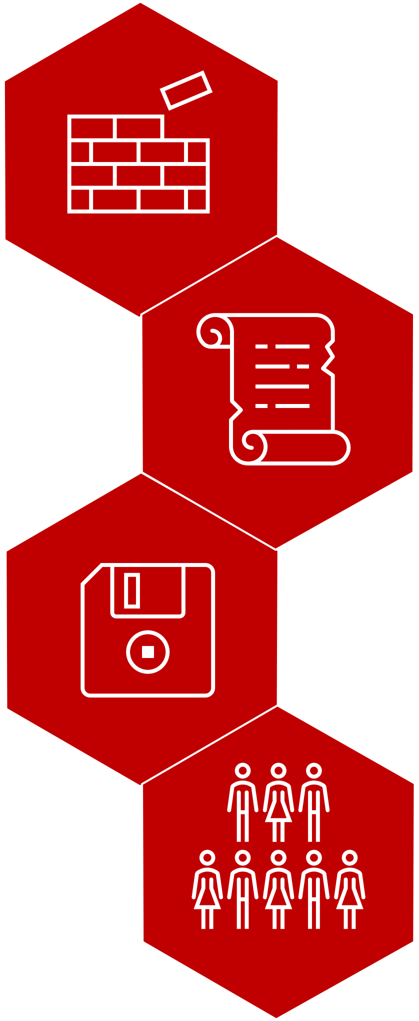
Section 4: Continuous Improvement

Keep your tools and processes current as work evolves.

The Challenge

Do these sound familiar to you?

Tools are created once and rarely revisited



Teams keep using outdated versions

Processes no longer match how work is done

New priorities, roles, or student needs are not reflected

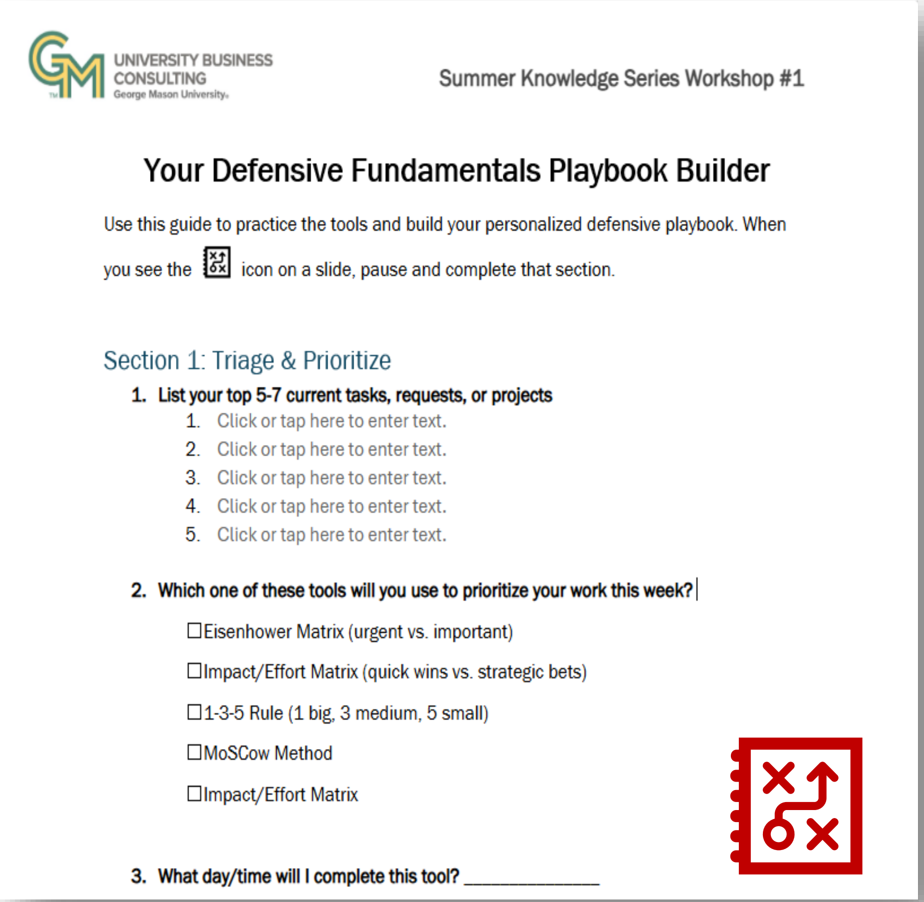
Continuous Improvement Tools

Use these tools to pause, reflect, and improve how work gets done across projects, meetings, and recurring responsibilities.

Tool	Use When You Need To...
Lessons Learned	Gather structured team feedback on what went well and what to change
Start, Stop, Continue	Gather structured feedback on practices to begin, discontinue, and sustain
Defensive Playbook Review	Review your **Defensive Playbook** on a set cadence to keep it current, useful, and aligned with how work actually happens

For more in-depth descriptions of these tools, please see the appendix slides.

Tool Deep Dive: Defensive Playbook Review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Summer Knowledge Series Workshop #1

Your Defensive Fundamentals Playbook Builder

Use this guide to practice the tools and build your personalized defensive playbook. When you see the icon on a slide, pause and complete that section.

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   - ☐Eisenhower Matrix (urgent vs. important)
   - ☐Impact/Effort Matrix (quick wins vs. strategic bets)
   - ☐1-3-5 Rule (1 big, 3 medium, 5 small)
   - ☐MoSCow Method
   - ☐Impact/Effort Matrix
3. What day/time will I complete this tool? ____________

Open your calendar right now! Block 15 minutes this Friday at 9:30 AM. Label it **Defensive Playbook Review.** In that protected time for personal reflection, you'll answer three questions:

- What tool did I use this week?
- Did it work?
- What needs to change?

Wrap Up

How to move forward with your Playbook

Keeping Your Playbook Relevant

A playbook only works if you revisit it.

Build a Simple Review Habit:

Pause: What is feeling harder than it should?

Reflect: What worked well? What created friction?

Refine: What should you update, remove, or add?

Good Times to Review:

- Weekly planning
- After a major project or event
- When responsibilities change
- When a tool stops being useful

Now You Have Your Own Playbook

1

Triage & Prioritize

You learned about how to **decide** what to work on when everything feels urgent.

2

Operational Clarity

You learned about how to **clarify** roles, ownership, and decision-making.

3

Build Repeatable Processes & Systems

You learned about how to **reduce** rework and make recurring work easier.

4

Continuous Improvement

You learned about how to **keep** your playbook useful over time.

Continue to iterate in all sections and use tools, such as AI, throughout the process

UBC 2026 Summer Series

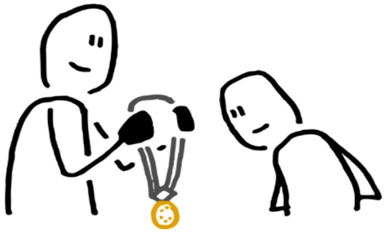
The summer 2026 series, **Winning this Season: Building Your Personal Playbook for Stewardship, Strategy, and Leadership in Uncertain Times**, will position attendees as intentional and empowered stewards of resources, people, and change – balancing operational discipline (defense), strategic adaptation (offense), and human-centered leadership (coaching).

Offensive Moves – Adapting and Coordinating in a Complex Institution

Wednesday, July 8 | 12 – 1 PM

Primary Focus: Helping faculty and staff collaborate effectively across units while aligning to institutional priorities and external shocks.

Register here.



Coaching Your Team – Accountability, Well-Being, and Communication

Tuesday, August 11 | 12 – 1 PM

Primary Focus: Equipping supervisors, project leads, and informal leaders to support people amid sustained change.

Register here.

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More information and prior session materials are available on our website: https://consulting.gmu.edu/summer-series/

Have More Questions?

UBC now offers 30-minute office hour slots to any George Mason University faculty or staff interested in learning more about UBC's **service offerings** or to talk through a **current issue** you're facing.

This resource is helpful if you're unclear how UBC can help or if you just want to talk with a member of our team with no strings attached.

Office hours sign-up link

GMU AI Community of Practice

Join the AI Community of Practice to stay connected and keep learning.

The AI COP is a community of non-instructional faculty and staff who are growing in our AI knowledge through learning, experimenting and sharing as we use it to do our work and serve Mason.

AI Community of Practice

University Business Consulting

consulting.gmu.edu

ubc@gmu.edu

We want your feedback! →

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- Importance, Complexity, and Urgency
- 1-3-5 Rule
- MoSCoW Method
- Impact/Effort Matrix

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- RACI Matrix
- Project Charters
- Timeline/Project Plan
- Stakeholder Map + Engagement Strategy
- Decision Tree

Section 3: Build Repeatable Processes and Systems

- Checklists and Templates
- Standard Operating Procedures (SOPs)
- Process Mapping
- Intake Form/Request Tracker
- Bonus: AI Prompts

Section 4: Continuous Improvement

- Lessons Learned
- Start, Stop, Continue
- Defensive Playbook Review

Section 1 Tools & Templates

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Eisenhower Decision Matrix

Eisenhower Decision Matrix

	Urgent	Not Urgent
Important	Do	Decide
Not Important	Delegate	Delete

The matrix helps you prioritize based on urgency and importance, encouraging you to spend more time on meaningful work and important tasks, rather than just reacting to urgency.

Do First: Urgent + Important – requires immediate attention and includes critical tasks with consequences if delayed.

Decide/Schedule: Not Urgent + Important – high-value, strategic activities that are often tied to long-term goals; plan and allocate time deliberately.

Delegate: Urgent + Not Important – needs quick action but not your personal involvement; frees you up for higher-value work

Delete/Eliminate: Not Urgent + Not Important – distractions or non-essential tasks that add little to no value; avoid or minimize.

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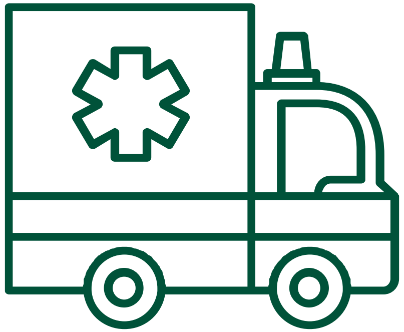
Importance, Complexity, and Urgency



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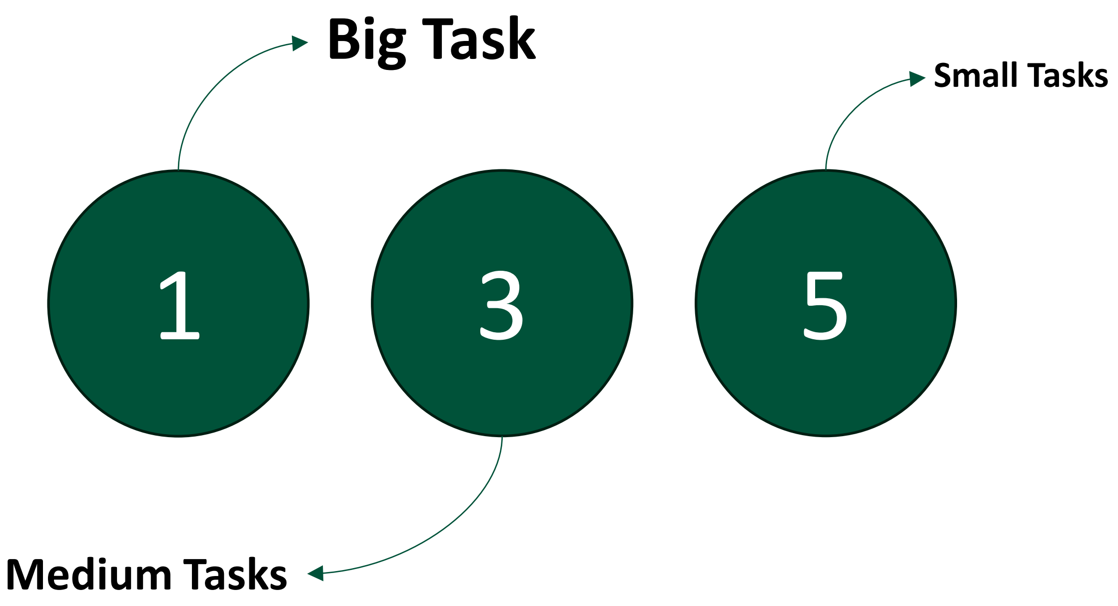
1-3-5 Rule



The 1-3-5 rule helps you set realistic daily goals, balancing ambition with manageability so you can stay productive without feeling overwhelmed.

1 Big Task: This should be your main priority for the day and requires the most time and focus. If you complete this, it means it was a productive day!

3 Medium Tasks: These tasks are important but less intensive. They support your broader goals but should be achievable within the day.

5 Small Tasks: These tasks are quick wins and simple to complete, such as administrative work, emails, and other minor to-dos. They help build momentum and clear clutter.

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MoSCoW Method

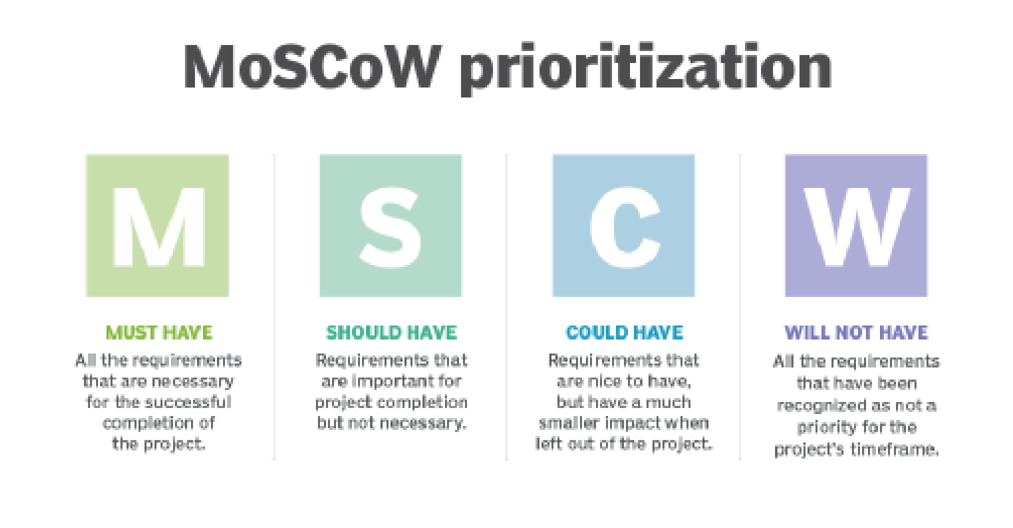

Image from Tech Target

The MoSCoW Method helps you prioritize requirements clearly, ensuring teams focus on what truly matters while managing expectations and avoiding overload.

Must Have: These are critical, non-negotiable requirements, and project(s) fail without them. This should be the highest priority.

Should Have: These are important, but not vital. They add significant value, but workarounds may exist. Include if time and resources allow.

Could Have: These are nice-to-have features. They are lower-impact and usually provide optional enhancements to projects. Include only if capacity remains.

Won't Have (for now): Out of scope for the current timeframe and should be intentionally deferred.

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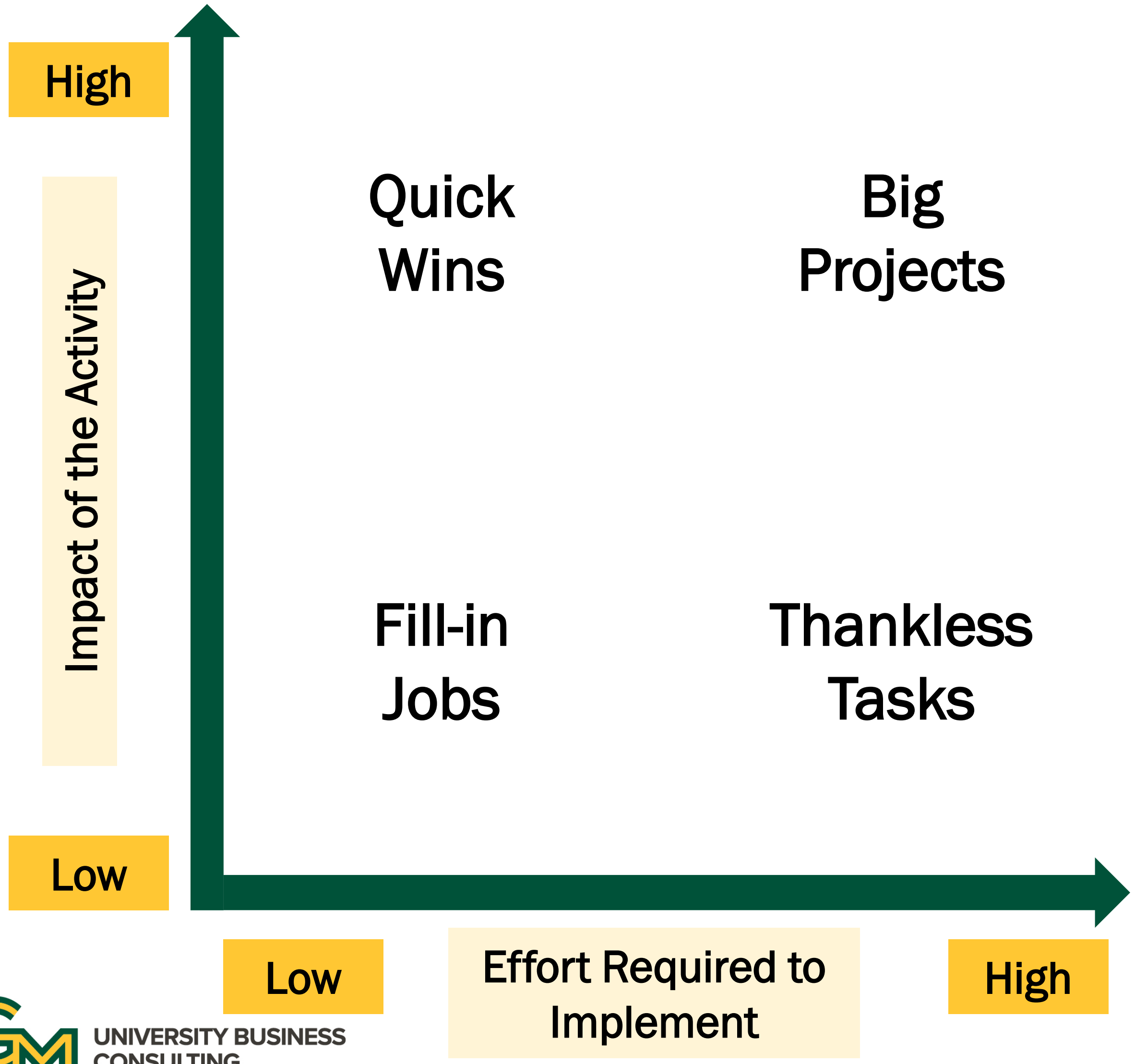
Importance, Complexity, and Urgency	**Compare tasks** when everything feels like a **priority**
1-3-5 Rule	Plan your day based on **realistic capacity** *(1 big, 3 medium, 5 small tasks)*
MoSCoW Method	Align on what's essential versus nice to have with a group of people
Impact/Effort Matrix	Find quick wins and decide what's worth investing time and resources into

Impact / Effort Matrix



The matrix helps you focus on which tasks **delivers the most value for the least effort,** ensuring smarter prioritization.

- **Quick Wins:** Do these first; great for building momentum.
- **Big Projects:** Strategic, long-term initiatives that require planning and time; worth pursuing but not quick fixes.
- **Fill-Ins:** Nice to have, so you can do them when time allows, but you don't need to prioritize; provide small incremental benefits.
- **Thankless Tasks:** Lowest priority and you can generally skip, if you can; they drain resources without meaningful return.

Section 2 Tools & Templates

Tool	Use When You Need To...
RACI Matrix	Clarify who is Responsible, Accountable, Consulted, and Informed on a task
Project Charters	Align on scope, goals, deliverables, and roles with a group
Timeline/Project Plan	Sequence work and assign ownership over time
Stakeholder Map + Engagement Strategy	Manage communications and set expectations with a group
Decision Tree	Map out decision paths and identify escalation paths

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RACI Matrix

Strategic Planning RACI Matrix

Responsible (R) – Does the work **Accountable (A)** – Final approval/ authority; every column should have <u>one</u> accountable person **Consulted (C)** - Provides input **Informed (I)** – Kept updated	Strategic Plan Framework					
	Establish Governance	Conduct environmental scan	Develop Mission, Vision & Values	Develop guiding principles and definition of done	Develop Strategic Pillars & Outcomes	Finalize Strategic Planning Framework
Sponsor				R		
Strategic Planning PM Team	A	R	A	A	A	A
Steering Committee	R	C	R	R	R	R
Pillar Working Groups			I	I	I	
Stakeholders (Student, Faculty, Staff, Alumni)		C	C		C	

The RACI Matrix helps you clarify roles and responsibilities, reducing confusion and ensuring accountability across teams and projects.

Responsible (R): The person who does/the people doing the work. They execute the task or deliverable. There can be multiple people responsible, but roles should be clear.

Accountable (A): The single owner of an outcome and ensures the task is completed correctly. Only one "A" per task is generally used to avoid confusion.

Consulted (C): Subject matter experts or stakeholders who provide input and feedback.

Informed: Those informed are kept up to date on progress or decisions, but are not directly involved in the execution.

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Project Charters

Project Charter Example

Project Name	IVR Project		
Project Sponsor	Dave Sponsor	Project Manager	Alice Michaels
Date of Project Approval	8th Mar 2015	Last Revision Date	17th Apr 2015
Project Description	To introduce a new automated telephone system to ensure all calls get answered.		
Scope	A IVR system will be introduced to assist the sales team in taking orders, and also to ensure no orders are missed. The system is only to help the sales team at this stage, other teams such as support are out of scope.		
Business Case	To increase orders per sales team member by 20% from current levels. To reduced unhandled calls to 0%. To increase customer satisfaction by 10 points.		
Constraints (in priority order)	Time	4 months	
	Budget	4 developers + 1 sales team rep	
	Scope	TBD	
	Quality	Prioritize time & budget over quality	
Project Deliverables	An IVS system to assist the sales team + training for the sales team + support during the first operational month of the system.		
Benefits (measurable results)	See KPIs below + business case above		
	KPI	Baseline	Goal
	Orders per sales person pd	20	24
	Unhandled calls pd	11	0
	Customer satisfaction	17	27
Steering Committee	CEO	Project Team	Sales Rep
	Finance Director		4x developers TBD
	Sales Director		
Key Stakeholders	Name	Success Criteria	
Risks	No team members have any previous experience of IVR setup, so there is a chance we've hugely underestimated the work involved.		

Image from Digital Project Manager

A project charter is a foundational alignment tool that doesn't go into deep detail but ensures everyone agrees on the why, what, and who before a project and work begin, reducing rework and confusion later. Project charters don't have to be exactly the same, but some components usually include:

Purpose/Objectives: Defines why the project exists and clearly states goals and desired outcomes. Aligns stakeholders on what success looks like.

Scope: Outlines what is included in the project, and just as importantly, what isn't. Helps prevent scope creep and sets clear boundaries from the start.

Key Stakeholders: Identifies sponsors, team members, and impacted parties, and clarifies who is involved and their interest in the project. Often aligns well with tools like the RACI Matrix.

High-Level Timeline & Milestones: Provides an approximate schedule or major checkpoints. It does not have to be a detailed plan, but more of a directional view of progress that sets expectations early.

Risks & Assumptions: Highlights known risks upfront and documents assumptions the project is based on. Helps teams anticipate challenges early.

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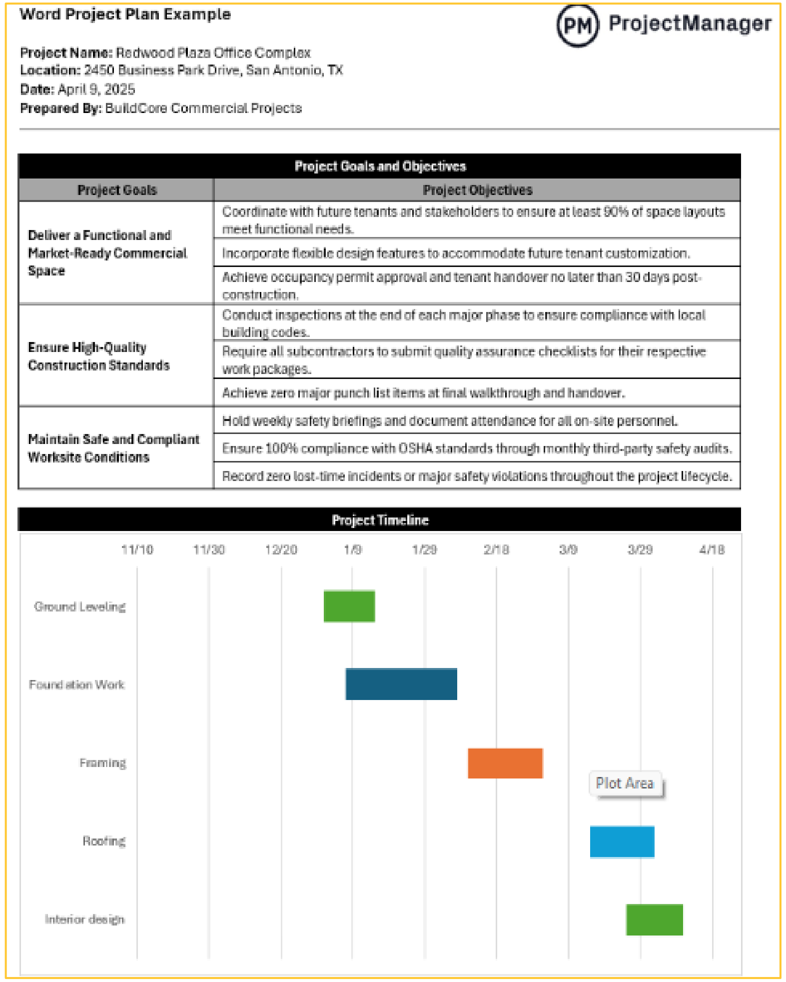
Project Plan & Timelines



Word Project Plan Example

PM ProjectManager

Project Name: Redwood Plaza Office Complex
Location: 2450 Business Park Drive, San Antonio, TX
Date: April 9, 2025
Prepared By: BuildCore Commercial Projects

Project Goals and Objectives	
Project Goals	**Project Objectives**
Deliver a Functional and Market-Ready Commercial Space	Coordinate with future tenants and stakeholders to ensure at least 90% of space layouts meet functional needs.
	Incorporate flexible design features to accommodate future tenant customization.
	Achieve occupancy permit approval and tenant handover no later than 30 days post-construction.
Ensure High-Quality Construction Standards	Conduct inspections at the end of each major phase to ensure compliance with local building codes.
	Require all subcontractors to submit quality assurance checklists for their respective work packages.
	Achieve zero major punch list items at final walkthrough and handover.
Maintain Safe and Compliant Worksite Conditions	Hold weekly safety briefings and document attendance for all on-site personnel.
	Ensure 100% compliance with OSHA standards through monthly third-party safety audits.
	Record zero lost-time incidents or major safety violations throughout the project lifecycle.

Project Timeline

Image from [Project Manager]

A Project Plan is an execution tool that translates strategy into a clear, time-bound roadmap, helping teams stay organized, on schedule, and accountable throughout the project. Project Plans don't have to be exactly the same, but some components usually include:

Task Breakdown: Lists all activities required to complete the project, often structured into phases or a work breakdown structure. Turns high-level goals into actionable steps.

Timeline & Milestones: Connects tasks to specific dates or timeframes and highlights key checkpoints and deliverables. Provides visibility into progress.

Sequencing & Dependencies: Identifies the order of tasks and shows what must happen before something else can start, helping avoid bottlenecks and delays.

Resource Allocation: Assigns people, time, and tools to each task and ensures the workload is balanced and realistic. Links closely with roles & the RACI Matrix.

Tracking & Updates: Used to monitor progress against the plan. Helps identify delays, risks, or adjustments needed. You can visualize this with Gantt charts or other similar tools.

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Stakeholder Map + Engagement Strategy

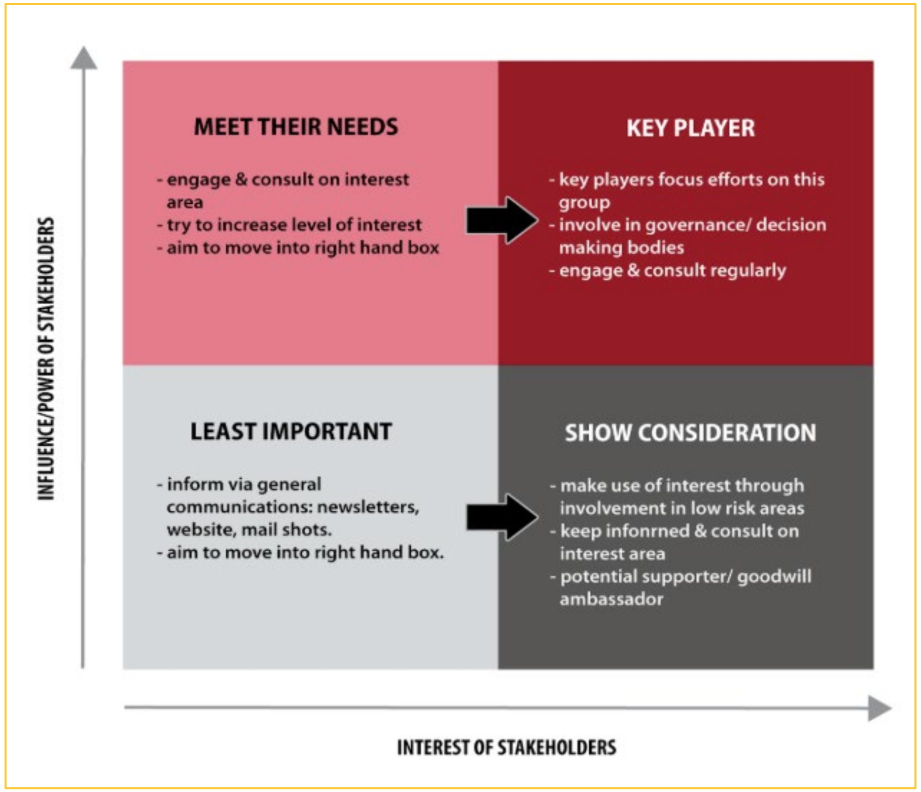

Image from Wondershare

A stakeholder map and an engagement strategy are relationship and communications tools to ensure the right people are informed, involved, and managed appropriately, which is critical for project success. Some components of maps and strategies include:

Stakeholder Identification: Lists individuals/groups impacted by the project, including the internal team and external partners.

Stakeholder Mapping: Categorizes stakeholders based on influence and level of interest. Examples of this include common groups: manage closely, keep satisfied, keep informed, or monitor.

Engagement Strategy: Defines how to interact with each stakeholder group and tailors the approach based on their needs, influence, and expectations.

Communications Plan: Specifies what information is shared, how often, and through which channels. Examples can include status reports, meetings, and dashboards.

Expectation Management: Align stakeholders on goals, timelines, and constraints. This addresses concerns early and proactively, building trust.

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Decision Tree

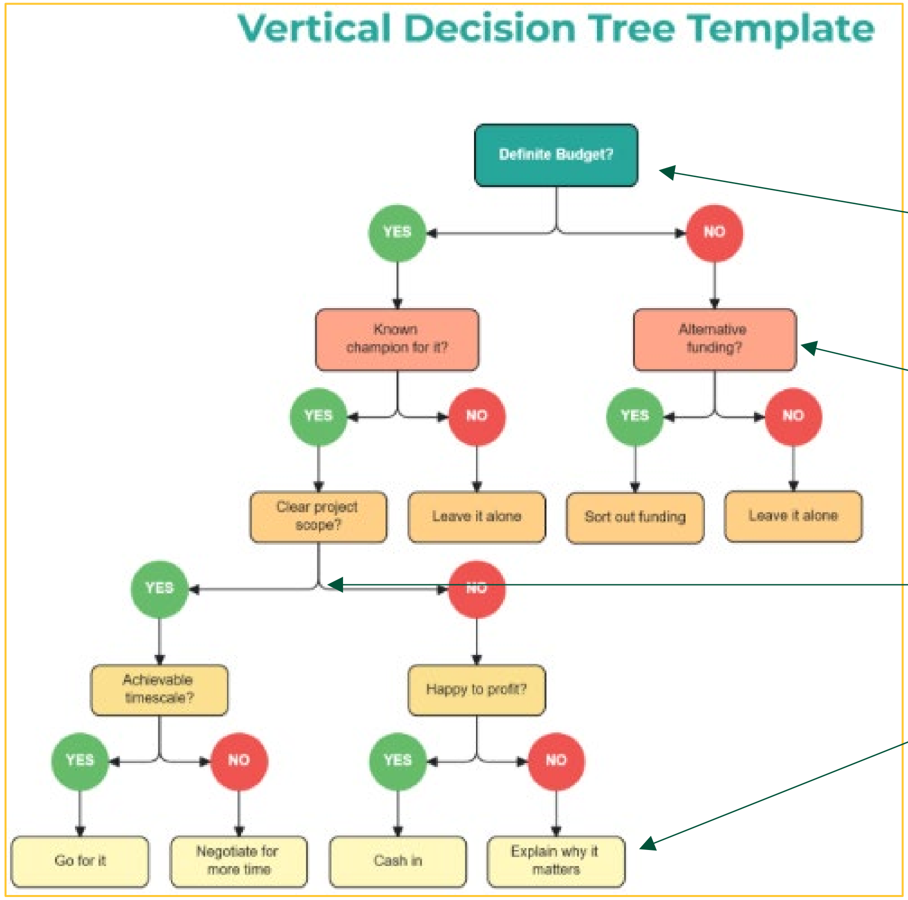

Image from Template

A decision tree is a structured decision-making tool that helps break complex choices into clear, visual pathways, making it easier to evaluate options, anticipate outcomes, and choose the most effective course of action.

Decision Points: Points where a choice must be made and represent different options or actions. Typically shown as branches from a single point.

Possible Outcomes: Each decision leads to distinct outcomes. Helps visualize best, worst, and most likely scenarios and encourages structured thinking.

Pathways & Consequences: Shows how one decision leads to another, making dependencies and downstream effects clear.

Final Outcomes: End results of each decision path. Can be compared to determine the best option. Supports data-driven decision-making.

Probability & Impact (optional): Assigns likelihood to each outcome and may include estimated costs, benefits, or risks. It is not required, but it can be powerful to quantify decisions, not just visualize them.

Section 3 Tools & Templates

Tool	Use When You Need To...
Checklists	Ensure routine tasks are completed consistently overtime
Templates	Standardizing recurring documents and communication
Standard Operating Procedures	Document tasks that require consistency or handoffs across people
Process Mapping	Understand and improve workflows or identify bottlenecks
Intake Form/ Request Tracker	Manage and track incoming work consistently

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Checklists & Templates

Checklists:

Checklists are a focus and clarity tool. They help you move forward when things feel chaotic by turning overwhelm into simple, actionable steps.

- ✓ Simplifies decisions: Break work into small, clear steps and reduce mental load. Help you focus on "what's next" instead of everything at once.
- ✓ Ensures Consistency: Standardize repeatable tasks and prevent missed steps or errors, especially under pressure or tight deadlines.
- ✓ Creates Momentum: Easy to start and complete items quickly and builds a sense of progress.
- ✓ Externalize Thinking: Get tasks out of your head and onto paper/tools to free up space for higher-priority thinking.

Templates:

Templates are a speed and consistency tool. They help you work faster and smarter by removing uncertainty and giving you a reliable framework.

- ✓ Provides Structure: Templates give you a starting point when you don't know where to begin and reduce time spent figuring out format/content.
- ✓ Save Time and Effort: Eliminate the need to recreate common documents or processes and speed up the implementation of tasks.
- ✓ Improves Quality and Completeness: Built-in prompts ensure important information isn't missed and encourage more thorough outputs.
- ✓ Reduce Decision Fatigue: Limit the number of choices you need to make and let you focus on content instead of structure or design.

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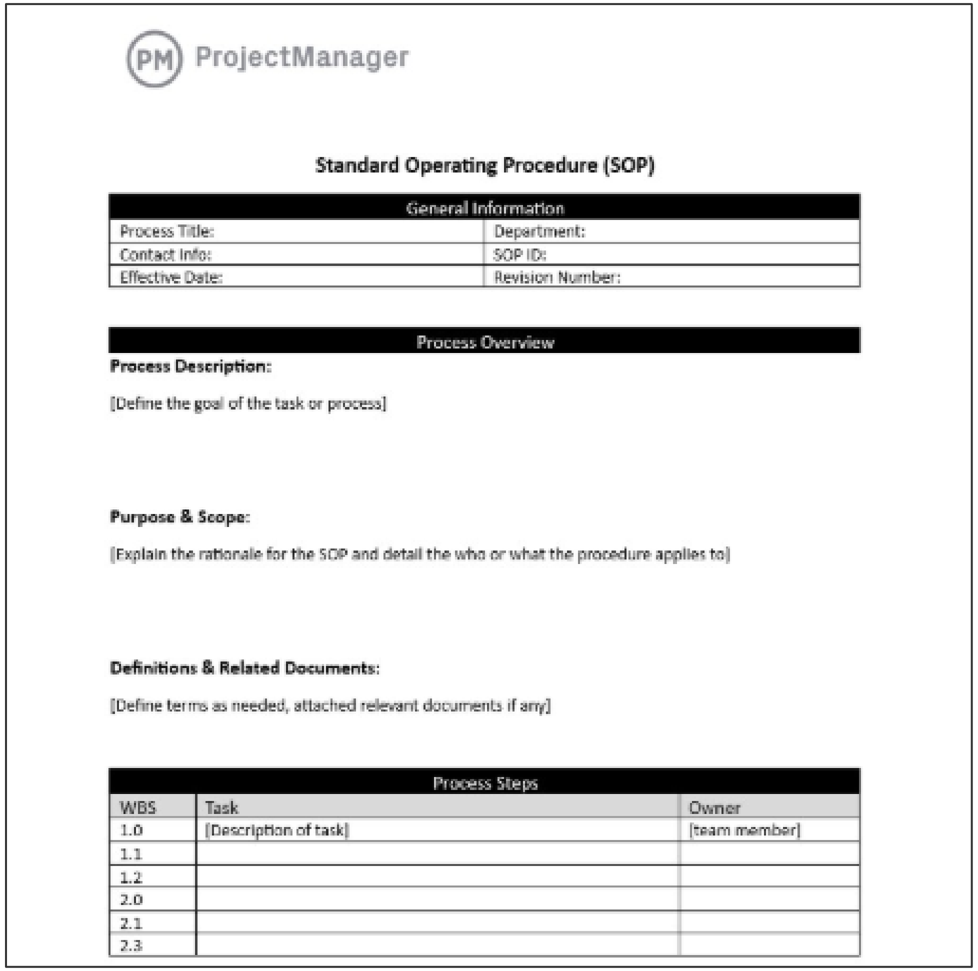
Standard Operating Procedures (SOPs)


PM ProjectManager

Standard Operating Procedure (SOP)

General Information	
Process Title:	Department:
Contact Info:	SOP ID:
Effective Date:	Revision Number:

Process Overview

Process Description:

[Define the goal of the task or process]

Purpose & Scope:

[Explain the rationale for the SOP and detail the who or what the procedure applies to]

Definitions & Related Documents:

[Define terms as needed, attached relevant documents if any]

Process Steps

WBS	Task	Owner
1.0	[Description of task]	[team member]
1.1		
1.2		
2.0		
2.1		
2.3		

Image from [Project Manager]

SOPs are a stability and clarity tool. They create structure in moments of urgency by giving you a reliable, repeatable way to get things done. It's best to work on SOPs in slower times so they can be relied on during busier peaks.

Step-by-Step Guidance: Demonstrate how to complete a task from start to finish and remove guesswork.

Save Time and Effort: Ensures tasks are performed the same way every time, reducing errors, rework, and variability.

Knowledge Capture: Documents processes so they don't "live in someone's head," making it easier to onboard new team members.

Scalability and Efficiency: Enables teams to handle more work without reinventing processes and supports delegation and cross-training.

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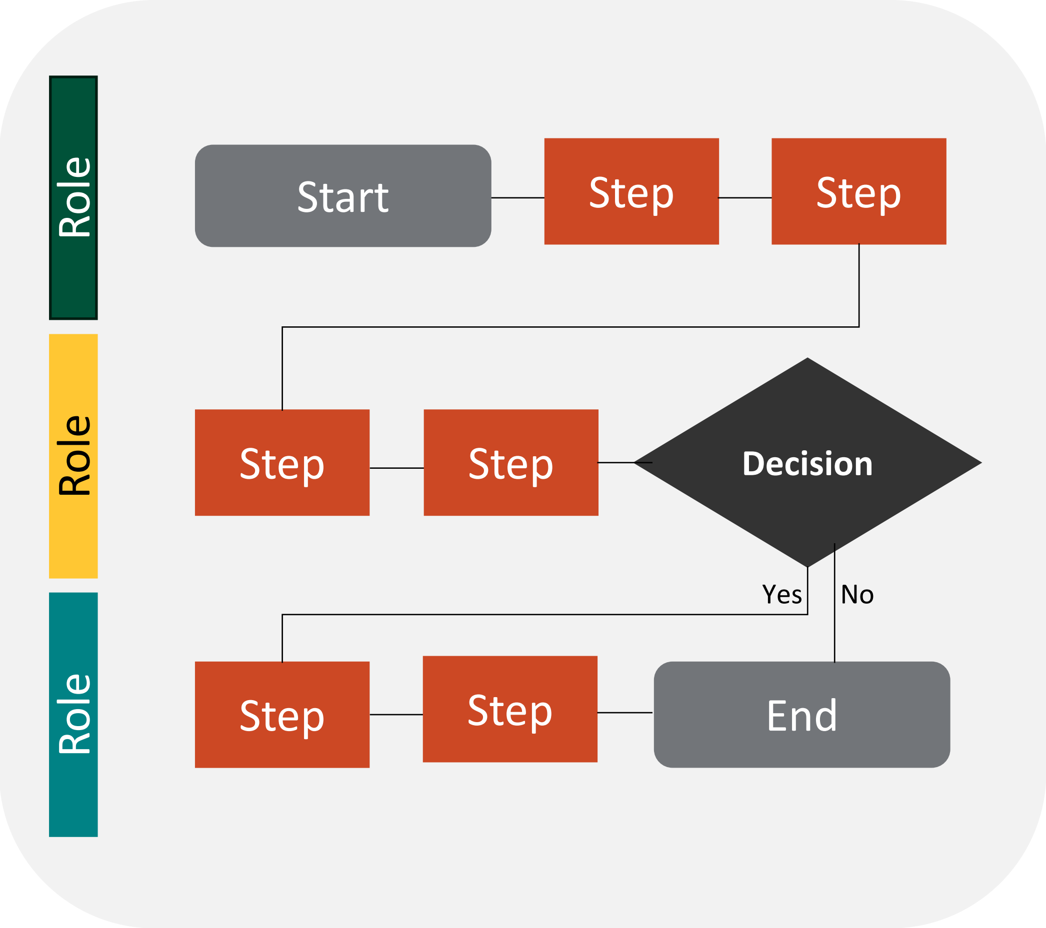
Process Mapping



Process mapping is a tool for clarity and shared understanding. It takes complex, often messy workflows and turns them into a shared visual story, making it easier to improve, standardize, and execute with confidence.

Visualizes the Workflow: Lays out each step in a process from start to finish, making workflows easier to see and understand.

Clarifies Roles and Handoffs: Shows who is responsible at each step and highlights where work is passed between people or teams.

Identifies Gaps and Inefficiencies: Reveals bottlenecks, delays, or redundant steps. Helps pinpoint where things break down.

Supports Improvement: Serves as a foundation for refining processes and helps move from reactive to more structured, repeatable workflows.

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Intake Form/Request Tracker

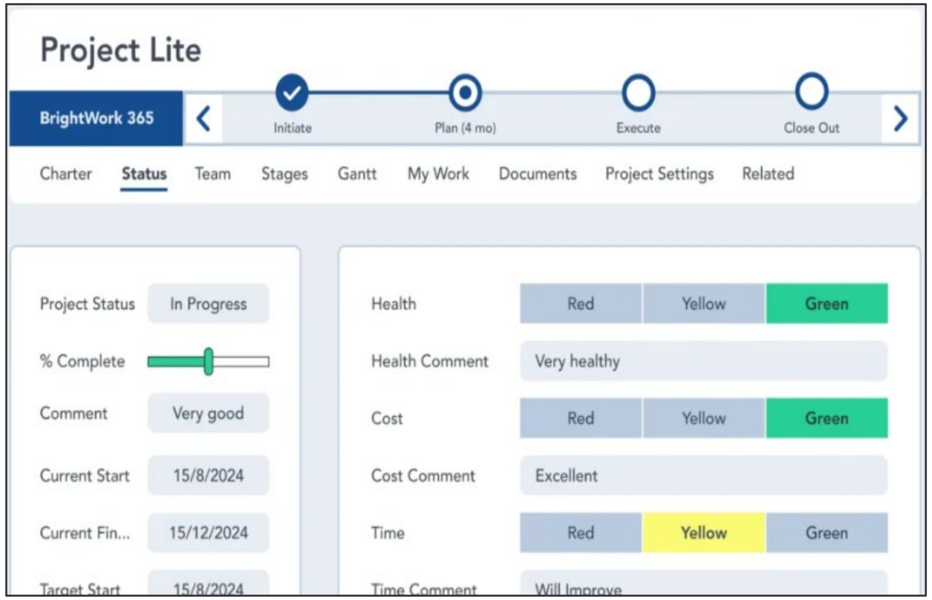

Image from [BrightWork]

An intake form or a request tracker is a control and visibility tool. It turns scattered, urgent asks into an organized, manageable workflow so teams can prioritize effectively and stay focused.

Centralized Request Capture: Collects all incoming work requests in one place and ensures nothing gets lost in emails, chats, or meetings.
Standardized Information: Uses consistent fields (e.g., request type, priority, deadline) and reduces back-and-forth due to missing details.

Prioritization: Enables quick assessment of urgency, impact, and effort, helping teams decide what to do first.
Tracking and Transparency: Shows status of requests (e.g., new, in progress, completed) and keeps stakeholders informed without constant updates.
Workload Management: Provides a view of team capacity and volume of requests and supports better planning and resource allocation.

Build Repeatable Processes and Systems with AI

Checklists

- "Create a repeatable checklist for preparing a dean's weekly leadership meeting."
- "Create a step-by-step checklist for onboarding a new staff member in my department. "

Templates

- "Create a reusable template for a weekly division update email that a department leader can send to staff."
- "Draft a standard project update template for a campus initiative such as implementing a new advising process or student service improvement."

Standard Operating Procedures

- "Write a step-by-step SOP for processing student travel reimbursement requests in a university office."
- "Create an SOP for responding to shared department inbox inquiries from students, faculty, and external partners."

Process Mapping

- "Map the current process for approving a new academic program proposal from initial concept through final approval. commonly occur."
- "Create a simple process map for planning a campus event with multiple partners such as academic departments, student affairs, communications, and facilities."

Intake Form / Request Tracker

- "Design an intake form for faculty and staff who request communications support for events, announcements, or student-facing campaigns."
- "Build a standardized intake and triage process for campus partners submitting requests to an institutional effectiveness or assessment team. "

Continuous Improvement Tools

Use these tools to pause, reflect, and improve how work gets done across projects, meetings, and recurring responsibilities.

Tool	Use When You Need To…
Lessons Learned	Gather structured team feedback on what went well and what to change
Start, Stop, Continue	Gather structured feedback on practices to begin, discontinue, and sustain
Defensive Playbook Review	Review your **Defensive Playbook** on a set cadence to keep it current, useful, and aligned with how work actually happens

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Lessons Learned

Lessons Learned Template

Today's Date: 1/2/2023
Project Name: My Project
Project Manager: George Washington
Notes: (add any extra info here)

PM ProjectManager

WIN or ISSUE	Describe What Happened	What Was the Impact?	How Does This Change Future Projects?
WIN	time tracking system with the team to test whether or not productivity would improve	We saved 200 hours of time and delivered the work 2 weeks early	We will roll out time tracking to all teams in the company
ISSUE	project was out sick for 2 weeks and there was no available replacement, so we had to wait for her	The project was delayed 4 weeks and the client was upset. A $25,000 credit was issued to the client	We need to have redundancy in the IT department to ensure there is always someone available
WIN	The client was so happy with the final presentation that she offered us a 2 year exclusive contract!	This contract is going to double our revenue growth over the next 2 years	The new style of in-person client presentation should be used on more projects, when possible.

Image from Project Manager

Lessons Learned is a continuous improvement and knowledge-sharing tool. It helps teams reflect on experiences, capture insights, and apply what was learned to improve future work, decision-making, and outcomes.

Captured What Worked Well: Identify successful approaches, decisions, and practices that should be repeated.

Identify Opportunities for Improvement: Reflect on challenges, gaps, or missteps to better understand root causes and avoid repeating issues.

Promote Knowledge Sharing: Preserve valuable insights and experiences so they can be shared across teams, projects, and future initiatives.

Strengthen Future Execution: Turn experiences into actionable recommendations that improve planning, communication, collaboration, and overall effectiveness over time.

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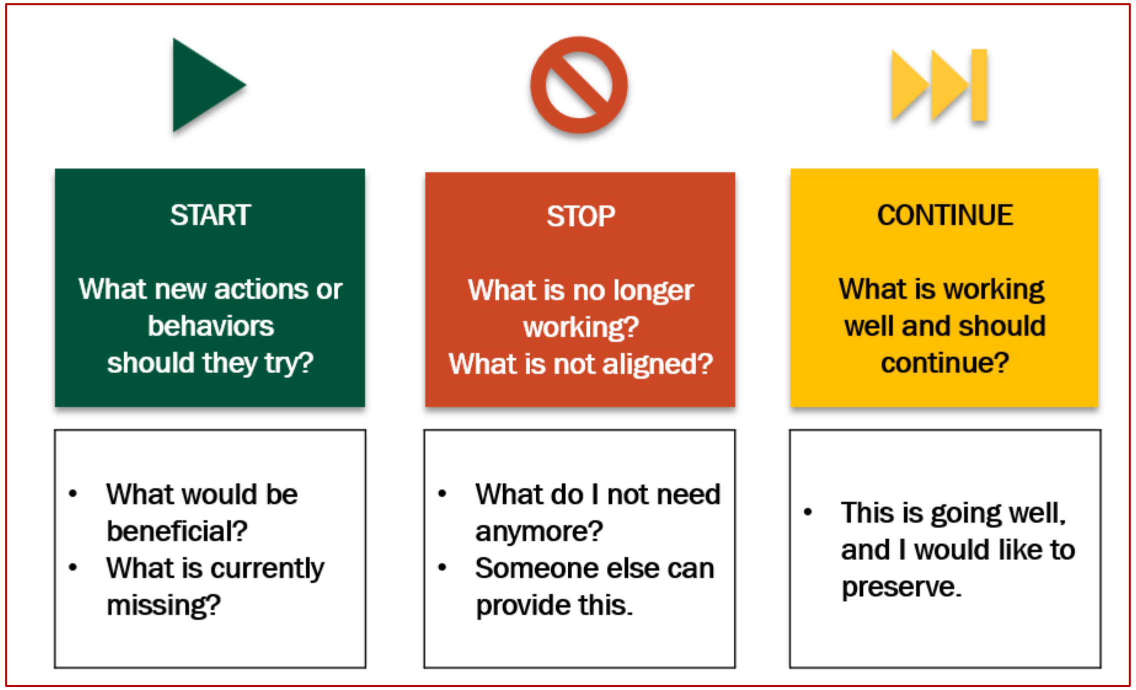
Start, Stop, Continue



The Start, Stop, Continue activity helps teams reflect on behaviors, processes, and best practices to improve collaboration and performance through actionable feedback.

Start: New actions, ideas, or behaviors the team should begin doing to improve outcomes, efficiency, or engagement. You can ask: “What would be beneficial?” and “What is currently missing?”

Stop: Activities, habits, or processes that are ineffective, create friction, or no longer add value. You can ask: “What do I not need anymore?”

Continue: Existing practices and behaviors that are working well and should be maintained or reinforced. You can ask, “What is going well, and what would I like to preserve?”

Continuous Improvement Tools

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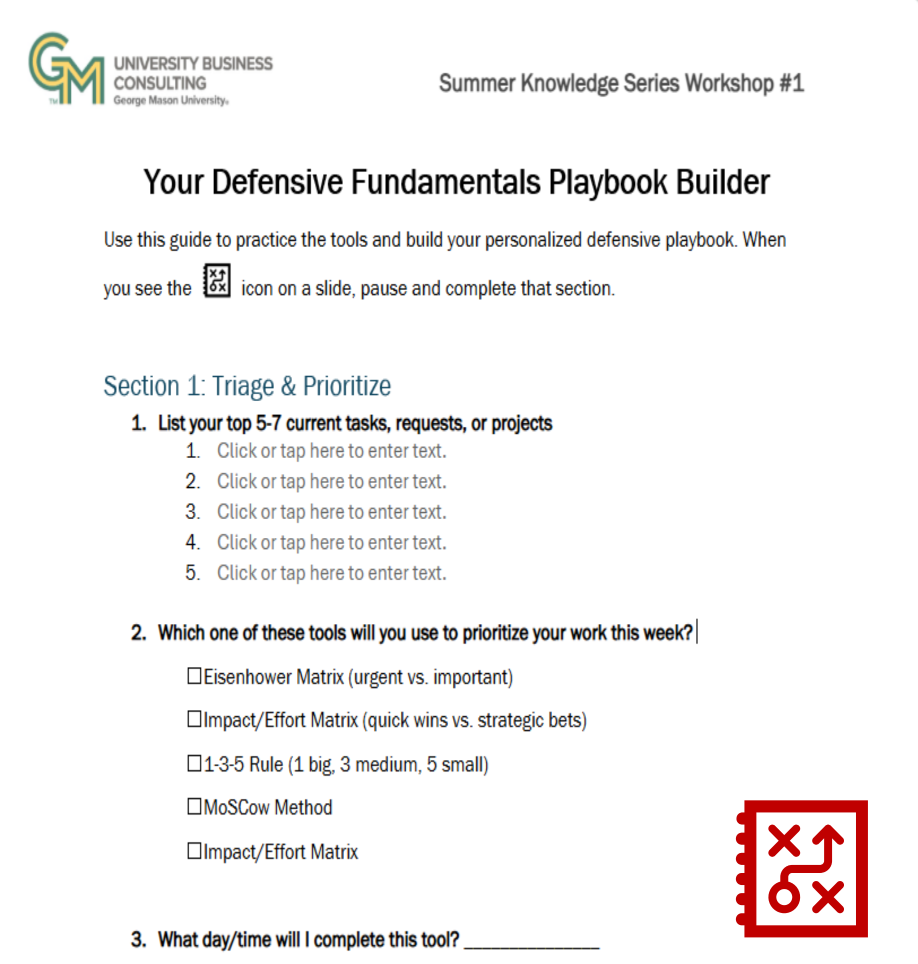
Defensive Playbook Review



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Summer Knowledge Series Workshop #1

Your Defensive Fundamentals Playbook Builder

Use this guide to practice the tools and build your personalized defensive playbook. When you see the icon on a slide, pause and complete that section.

Section 1: Triage & Prioritize

1. List your top 5-7 current tasks, requests, or projects
   1. Click or tap here to enter text.
   2. Click or tap here to enter text.
   3. Click or tap here to enter text.
   4. Click or tap here to enter text.
   5. Click or tap here to enter text.
2. Which one of these tools will you use to prioritize your work this week?
   - ☐Eisenhower Matrix (urgent vs. important)
   - ☐Impact/Effort Matrix (quick wins vs. strategic bets)
   - ☐1-3-5 Rule (1 big, 3 medium, 5 small)
   - ☐MoSCow Method
   - ☐Impact/Effort Matrix
3. What day/time will I complete this tool? ____________

In regular, protected time for personal reflection, you can answer the following questions to ensure your playbook is updated:

- What tool did I use this week?
- Did it work?
- What needs to change?