



Decision Making and Problem Solving

Competencies

"This Deep Dive draws from one of the Areas of Competence in the [Career Development Manager/Leader Competency Framework](#). Through reflection, analysis of real situations, and practical activities, you'll explore how this part of the framework shapes your leadership practice."

The Challenge Ahead

In human services, choices often come with complexity and nuance. Leaders navigate ambiguity by balancing priorities, adapting to change, and making informed choices even in challenging situations. Whether responding to a crisis, allocating limited resources, or resolving team conflict, the quality of decisions shapes outcomes for clients, staff, and the organization.

Many leaders experience uncertainty when weighing competing factors or fear making the "wrong" call, especially when client well-being is involved. Others rely on intuition or habit, missing the structured thinking that leads to stronger results. Sometimes decisions happen in isolation, overlooking the value of diverse perspectives.

This resource invites you to build decision-making capacity—your own and your team's—so choices become thoughtful, inclusive, and action-oriented. It's about shifting from reactive to reflective, from stuck to strategic.

The Leader's Role in Problem Solving and Decision Making

You're likely reading this because you see that the only way things are going to get better regarding our role isn't to have all the answers, instead, let's look at your role as the architect of a space where the smartest decisions come to life! This means:

- Framing problems clearly so others can engage meaningfully
- Gathering and analyzing relevant data without getting lost in it
- Encouraging diverse perspectives and surfacing creative options
- Balancing urgency with reflection, and courage with humility
- Taking ownership — not just of the decision, but of its impact

When you model thoughtful decision-making, you empower your team to do the same. Over time, this builds a culture of shared accountability, continuous learning, and adaptive leadership.

In this resource, you'll find discussion guides and frameworks you can use in your decision making to improve the quality and impact of your choices.

1. Problem Clarification Discussion Guide
2. Generate and Evaluate Options
3. Reflect on Decision Making



Using these resources with your team will improve their clarity and commitment to decisions, and give you the advantage of their perspectives and insights.





Exercise 1: Clarify the Problem

Albert Einstein is reported as saying, *“If I were given one hour to save the planet, I would spend 59 minutes defining the problem and one minute resolving it.”*

This quote captures what this step – Clarify the Problem – is about. This step is about looking deeply at the problem, and includes challenging the way you see it in order to reveal more clarity so you can select solutions effectively. In this step you gather as much information as possible, and consider what you believe, feel, and think about the problem. Taking time to gather information, and challenge your own assumptions and beliefs about the problem can redefine the issue and provide avenues to solutions that you may not have considered before. Doing this process with your team also contributes to their learning, strategic thinking, and ability to tackle tough problems on their own.

Use this discussion guide to really clarify the problem and understand the way you interact with the problem before you go on to solve it. You may have heard of the “5 Whys” or “Causal Analysis” approaches to get beyond symptoms and identify root causes; this captures many of the same elements.

Discussion Guide

Work through the questions below with your team, documenting discussion as you go. Use open-ended prompts like “What else?” to drive the discussion deeper.

- What is the presenting issue?
- What are the underlying causes?
 - What else?
 - What else?
- Who is affected, and how?
- What assumptions are we making?
- What data do we have?
- What data is missing or unclear?
- What do staff, clients, or partners say? How do we know?
- What patterns or contradictions are emerging?
- What additional information do we need to move forward?





Discussion Guide (Sample)

Scenario: Exploring data and feedback on intake experience

What is the presenting issue?	Clients disengage after their first intake appointment.
What are the underlying causes?	Intake feels transactional; staff are rushed; clients don't feel heard or supported.
Who is affected, and how?	Clients miss out on services; staff feel ineffective; funders see poor outcomes.
What data do we have?	Drop-off rates by unit; client satisfaction scores; staff time logs.
What data is missing or unclear?	Qualitative feedback from clients; staff perspectives on intake challenges.
What do staff, clients, or partners say?	Staff say they're rushed; clients say intake feels impersonal. No formal surveys, largely anecdotal.
What patterns or contradictions are emerging?	High drop-off correlates with rushed intake and low satisfaction.
What additional information do we need to move forward?	Client interviews; best practices from peer organizations.





Exercise 2: Diverge and Converge on Solutions

Step 1: Generate Options

After taking time to carefully clarify the problem, take a similar approach to selecting solutions. Avoid rushing to the first solution that comes to mind. Encourage divergent thinking before converging on a solution. Working with your team, ask each staff member to take on a “persona,” and think about the problem from the perspective of that persona. Ensure you give each persona time to think about their perspective and share it with the group so that everyone gets the benefit of their perspective before converging on a decision.

Personas could represent the perspectives and well-being of various interest holders related to your work, such as:

- board members
- clients
- funders
- peer organizations

Personas could also include different ways of thinking, for example

- data driven and fact focused
- empathy and emotion oriented
- risk resistant and safety seeking
- compelled by change and creativity
- powered by positive thinking and optimism

Note: If this exercise appeals to you, you may want to learn more about Edward de Bono’s “Six Thinking Hats” as a problem solving and decision making technique.

Step 2: Evaluate Options

A structured decision matrix or criteria checklist can assist to evaluate options, give you a clear rationale for the decision that you can share with interest holders, and illustrate how many possible solutions might be workable in the event your first choice doesn’t work out.





Worksheet 1: Decision Matrix

Purpose

Evaluate options using weighted criteria to support informed, transparent decision-making.

Assign a score (e.g., 1–5) for each criterion and then measure each option according to the criteria you’ve set. Doing this exercise as a team creates an opportunity to find consensus on both the criteria and the assessment of each option. When you and your team cannot find consensus, that’s generally a good indicator that you need more information. When you complete the decision matrix, add up the total scores for each option to indicate which option ranks highest. If you have more than one option that meets the criteria, then you have a back up plan. This approach will also help you communicate the “why” behind your decisions to interest holders.

Option	Criteria 1	Criteria 2	Criteria 3	Criteria 4	Total Score	Notes
Option A						
Option B						
Option C						

Scoring: 1 = Low, 5 = High





Worksheet 1: Decision Matrix (Sample)

Scenario: Choosing between three intake redesign options

Option	Criteria 1	Criteria 2	Criteria 3	Criteria 4	Total Score	Notes
A: Add 15-minute rapport-building segment	5	4	5	4	18	High impact, moderate time cost
B: Train staff in trauma-informed intake	4	3	5	3	15	Requires external trainer
C: Automate intake with online form	2	5	2	5	14	Easy to implement, low engagement

Scoring: 1 = Low, 5 = High





Step 3: Reflect and Learn

Every decision is a chance to build wisdom. When you and your team engage in reflective discussion after a decision has been made and implemented, you foster an environment in which people are safe to discuss challenges and uncertainty, and in which setbacks foster learning. As people learn, they'll use more effective decision making habits and achieve better outcomes.

Use this decision debrief discussion framework to improve your reflective discussion and build the decision making capacity of your team and thereby your organization's outcomes.





Worksheet 2: Decision Debrief Template

Purpose

Reflect on the decision making process to capture lessons and improve future decisions.

Prompt	Response
What worked well in this decision process?	
What surprised us or didn't go as expected?	
What would we do differently next time?	
What feedback have we received from others?	
What follow-up actions are needed?	





Worksheet 2: Decision Debrief Template (Sample)

Scenario: Reflecting after implementing Option A: Add 15-minute rapport-building segment to intake

Prompt	Response
What worked well in this decision process?	Staff appreciated being involved; clients responded positively to the change.
What surprised us or didn't go as expected?	Some staff felt unsure how to use the extra time effectively.
What would we do differently next time?	Provide a short guide or script for rapport-building.
What feedback have we received from others?	Clients felt more respected; staff felt more connected to their work.
What follow-up actions are needed?	Develop a coaching session to support staff in using the new intake format.

