The Decision Brief: A Practical Tool for Difficult Decisions

A reusable brief and completed workplace example.

Turn a difficult decision into a clear recommendation. Use this brief when priorities compete, colleagues disagree, or promising evidence leaves important questions unanswered. It helps you organize what you know, compare realistic options, and explain what should happen next.

Six sections to organize your thinking

1. Define the decision. State the question and the outcome you want.

2. Examine the situation. Separate facts, assumptions, unknowns, and limits.

3. Compare realistic options. Record each option's benefit and tradeoff.

4. Test the preferred option. Is it Right, Smart, and Sustainable?

5. Commit to a next step. Explain your choice, first action, and who must act.

6. Set the review point. Name the evidence or change that would make you reconsider.

Start with a decision of your own

Choose one decision or recommendation you need to make. Use the blank brief on the next page and write short answers. Consult Maya's completed workplace example on the following pages when you need to see how a field can be answered. Mark assumptions clearly; identify missing information and required approvals before committing.

When you want more instruction and practice

The complete $49 USD Decision Toolkit adds a book, a 38-drill workbook, three worked examples, Quick Start, Tool Selector, and reusable Decision Brief and Decision Review sheets. It offers more ways to practice and review your reasoning. The price includes applicable tax. Return to the download page to explore the toolkit.

This free guide can be used independently; no purchase is required. The blank brief is printable, not fillable. Maya's case and estimates are fictional teaching material. A sound process cannot guarantee an outcome.

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Decision Brief

Decision owner: __________________________ Date: ____________________

Decision needed by: ____________________

Use short answers. Mark assumptions clearly. If important information is missing, name how you will address it.

1. Define the decision

What must I decide?

What outcome am I trying to achieve?

2. Examine the situation

What facts can I verify?

What am I assuming, and what remains unknown?

What limits my options?

Consider time, resources, responsibilities, and what you can control.

3. Compare realistic options

Include investigating further or waiting if either is a realistic choice.

Option	Main benefit	Main risk or tradeoff
A.		
B.		
C.		

4. Test the preferred option

Preferred option: ____________________

Test	My assessment
Right: Does it respect my principles and responsibilities to others?	
Smart: Does the evidence support it, given the risks and constraints?	
Sustainable: Can I support its demands and accept its likely consequences over time?	

If an answer is no or uncertain, identify what must change before proceeding.

5. Commit to a next step

My decision and main reason:

First action: __________________________ By when: ____________________

Who needs to know or act?

6. Set the review point

What new evidence or change would make me reconsider?

Review date: ____________________

Judge the reasoning using what was knowable at the time. A good process cannot guarantee a good outcome.

Worked Example: The Overloaded Team

Illustrative scenario. The people, organization, estimates, and events below are invented for teaching. This example demonstrates a decision process, not a proven outcome.

The situation

It is Monday morning. Maya leads an operations team. After accounting for routine work, approved leave, and fixed meetings, the team has 64 hours available for project work this week. Two existing commitments are estimated to need all 64 hours: a client handover requires 40 hours, and an internal report requires 24 hours. Both are due Friday.

Her director requests an additional analysis for a Thursday planning meeting. The team estimates that the requested scope would require another 20 hours. Maya can allocate work within the team, but only the director can change the internal report's deadline. The client handover date has been agreed externally.

Maya initially wants to say yes and work out the details later. She also worries that raising the conflict will make her seem unhelpful. Neither reaction settles which work should take priority.

The estimates are planning inputs, not precise predictions. There is no spare capacity in the current plan, even before the new request. Maya needs to make the tradeoff explicit and seek a decision from the person who can authorize it.

How to read the completed brief

Read the brief on the next page, then notice three distinctions:

- **A request is not a capacity plan.** The new assignment would raise estimated demand from 64 to 84 hours. Maya does not count unapproved overtime as available capacity.

- **A preference is not evidence.** She suspects the internal report can move, but checks who uses it before treating a delay as harmless.

- **A recommendation is not authorization.** Maya recommends a tradeoff. She does not promise the new work or change a deadline on her own.

The recommended option is conditional. If the director cannot move the report, Maya must return to the other options rather than pretend that all three commitments fit.

What happens after the decision?

No successful ending is assumed. Record what the director authorizes, who is notified, and the revised commitments. At review, compare actual hours and effects with the estimates. An authorized delay may still have costs; documenting the reasoning makes those costs easier to examine.

Completed Decision Brief

Decision owner: Maya, operations team lead
Date: Monday, Week 1
Decision needed by: Monday noon, before allocating the week's project work

1. Define the decision

What must I decide?
What capacity tradeoff should I recommend before accepting the new analysis?

What outcome am I trying to achieve?
Support Thursday's planning decision while protecting the client handover and making any displaced work explicit.

2. Examine the situation

What facts can I verify?
The capacity plan shows 64 project hours available. Current task estimates total 64 hours; the new request is estimated at 20 more. These are estimates, not guaranteed durations. The director controls the internal report deadline.

What am I assuming, and what remains unknown?
I assume the internal report can move to Tuesday of Week 2 without serious harm. Its users must confirm that, and I must check next week's capacity. I do not yet know the minimum useful analysis scope.

What limits my options?
The client date is externally agreed. No extra staff or overtime is approved. I cannot unilaterally move the report deadline.

3. Compare realistic options

Option	Main benefit	Main risk or tradeoff
A. Keep current work; defer analysis	Protects current commitments	Planning meeting lacks the requested analysis
B. Move report; do full analysis	Estimated demand becomes 60 hours	Report users wait; next week's workload must fit
C. Seek a smaller scope and added capacity	May preserve all deadlines	Scope, staffing, and handoff costs are unconfirmed

4. Test the preferred option

Preferred option: B, subject to checks and director approval.

Test	My assessment
Right	Make the displaced commitment visible; consult report users and obtain authorization.
Smart	40 handover hours + 20 analysis hours = 60. Four hours remain, but estimates may change.
Sustainable	Check next week's capacity before agreeing to the new report date. Do not rely on hidden overtime.

If those checks fail, reassess A and C with the director.

5. Commit to a next step

My decision and main reason:
Recommend B because it can fit this week's estimate while protecting the client commitment. Acceptance remains conditional on a workable report date and approval.

First action: Confirm report dependencies and next week's capacity; present the options to the director. **By when:** Monday noon.

Who needs to know or act?
Director authorizes; report users confirm effects; team receives revised priorities after approval. Until then, continue existing commitments.

6. Set the review point

What new evidence or change would make me reconsider?
An immovable report dependency, no capacity next week, expanded analysis scope, or a forecast above this week's 64 hours.

Review date: Tuesday, Week 1, 10 a.m.; sooner if a trigger occurs.

Judge the reasoning using what was knowable at the time. A good process cannot guarantee a good outcome.