

## Quick Tips for Team Leaders<sup>1</sup>

### Taking Action: Multivoting + Fist-to-Five + SBAR<sup>2</sup>

Jeff Oltmann

## Multivoting

Multivoting is a way to quantify the positions and preferences of a group by allowing each member to decide how much an option is worth to them. Each member's votes are recorded, but a decision is not necessarily reached. Multivoting gives the group information about where individual members stand and the strength of their positions. The votes are used as a springboard for identifying consensus, surfacing disagreements, and identifying the size of gaps.

### When to Use

- “Taking the temperature” of a group as it is moving toward agreement.
- Identifying areas of disagreement, misunderstanding, or differing priorities.
- There are fewer than ten options under consideration.

### Procedure

Set up a grid of names and options on a flip chart. Give each member a number of votes to distribute across the options according to their preferences. Members distribute their votes across the options to indicate their relative preferences. Use these voting guidelines:

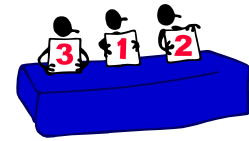
- Encourage members to spread their votes across all options to express their relative feelings about all of them. Don't lump all votes on a single favorite.
- Each person should decide how to distribute votes before recording them on the chart, to avoid being influenced by how others vote.
- Ask for and record votes by option, not by person. For each option, members should vote simultaneously by raising fingers, showing a scorecard, or similar method.

	A	B	C	D
Tom	3	1	1	1
Mary	1	1	2	2
John	1	1	3	1
Karen	1	1	2	2

<sup>1</sup> This series of “Quick Tips” articles is by Jeff Oltmann, experienced program and technology executive and principal of Synergy Professional Services, LLC in Oregon, USA. The Quick Tips offer simple approaches and models for problem analysis, gathering ideas and input from team members, facilitation and taking action. The tips offered in this series were identified or developed over two decades of helping program, project and team leaders get things done in faster, more agile ways. Learn more about Jeff Oltmann in his author profile below.

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- Allow votes of “zero” only when a person can’t live with that option.



## Considerations

1. The number of votes available to each member should be about 1.5 times the number of options.
2. The biggest value of multivoting is the discussion that follows. Facilitate a discussion of large gaps, extreme positions, and areas of agreement.
3. A variation of multivoting is “red dot” voting. All options are listed on a flipchart. Members have adhesive dots corresponding to their votes. All members simultaneously distribute their dots next to the options. The resulting visual cluster gives a picture of the group’s preference for each option. The method is fast and works well with a large group, but does not allow follow up discussion on individual disagreements because individual votes are not recorded. Thus it is good for fast sensing of the temperature, but less effective at closing gaps and building commitment.
4. To use meeting time most effectively, schedule a multivote just before a break. Allow people to finish voting during the break.
5. See the Fist to Five technique for a quick variation of this technique that is optimized for voting on just one issue.

## Fist to Five

To use this technique, the facilitator restates an action the group might take and asks the team to show their level of support. Each team member responds by holding up a closed fist or the number of fingers that corresponds to her level of support. If a team member holds up fewer than three fingers, she is given the opportunity to state her questions, objections, or recommendations for improvement. Then the team may respond, modify the idea under discussion, or generate new ideas.

This encourages several positive behaviors that may lead the team toward a higher quality decision.

- Dissenters make a case for their position to the rest of the group.
- Proponents hear and consider differing points of view.
- Everyone works together to make the proposal better.
- Reduces the chance that silent disagreement later leads to lack of support or sabotage of the course of action.

The facilitator continues the fist to five process until the team achieves consensus (everyone holds up three or more fingers) or agrees to move on to the next issue.

**Closed fist** - No. A closed fist is a way to block consensus.



**1 finger** - I have major concerns that could potentially be addressed.



**2 fingers** - I would like to discuss some minor issues or get more information.



**3 fingers** - I'm not in total agreement but I feel comfortable enough to let this proposal pass without further discussion.



**4 fingers** - I think it's a good idea and will work for it.



**5 fingers** - It's a great idea and I would like to take the lead when we implement it.



Definition modified from an entry on the agile-focused site [whatis.com](http://whatis.com)., which was retrieved 7/3/17 from <http://whatis.techtarget.com/definition/fist-to-five-fist-of-five>

## SBAR

Ever have trouble getting someone to present a concise analysis of an important situation, especially clear recommendations? Next time ask for an SBAR report, which is about one page long and has four standard sections.

- **Situation** is a concise statement of the problem.
- **Background** summarizes context about the situation, such as relevant knowledge, research, and observations.
- **Assessment** analyzes the situation and presents options.
- **Recommendation** lists the actions that the author recommends based on his or her assessment.

The SBAR technique is a concrete, easy-to-remember framework for getting the information you need to make a good decision. It has several advantages for clear communication.

- It encourages the author to avoid vagueness by assessing options and making *specific* recommendations instead.
- It's oriented toward taking action.
- The format is simple and concrete. Leaders can grasp the information in it and make good decisions quickly.
- Used consistently, it encourages discipline in critical communication and decision making.

SBAR was developed for patient safety communications by physicians at Kaiser Permanente of Colorado. It is widely used in healthcare and should be adopted in other fields.

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## About the Author



### **Jeff Oltmann**

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**Jeff Oltmann** is a seasoned leader with over 30 years of experience advising clients, managing successful technology programs, and developing new products. His specialties include strategy deployment, operational and project excellence, and project portfolio management. As principal consultant at Synergy Professional Services, Jeff advises leaders and teams in diverse sectors including healthcare, research, bioscience, and technology product development.

Jeff is the founder of the Portfolio and Project Leaders Forum. He is also on the graduate faculty of the Division of Management at Oregon Health and Science University and was previously on executive staff at IBM. He teaches portfolio, program, and project management and is a certified Project Management Professional (PMP®).

Jeff welcomes your questions and ideas. You can contact him at [jeff@spspro.com](mailto:jeff@spspro.com) or read previous articles at [www.spspro.com/article-library](http://www.spspro.com/article-library).

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