

The Practical Leader's Decision Checklist

A clear, people-centred process for making
important workplace decisions

FILLABLE WORKBOOK

Use digitally or print and complete by hand.



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Group**



Leaders regularly make decisions involving employees, hiring, priorities, processes, technology and organizational change. This workbook provides a practical way to pause, examine the situation and make a thoughtful, well-supported decision.

Use it when a decision:

- ☐ Affects employees, candidates, customers or stakeholders
- ☐ Could create a meaningful operational or financial impact
- ☐ Involves competing priorities or perspectives
- ☐ May introduce risk or unintended consequences
- ☐ Is difficult to reverse
- ☐ Requires support from others to succeed
- ☐ Involves a new process, policy, technology or workplace practice

A practical approach

- | | |
|-----------------|--|
| Pause | Make sure the issue and urgency are understood. |
| Examine | Separate facts, evidence and observations from assumptions. |
| Consider | Think about people, values, options and risks. |
| Decide | Record the reasoning, accountability and communication plan. |
| Review | Check whether the decision produced the intended outcome. |

Important

This is a general decision-support tool. It does not replace legal, financial, privacy, human resources, safety or other professional advice appropriate to the circumstances.

Part 1: Define the Decision

Start with the issue, the reason for acting and the outcome you are seeking.



1. What decision needs to be made?

Write it as clearly and specifically as possible.

2. What problem or opportunity are we addressing?

Describe the underlying issue, not only its most visible symptom.

3. Why does this decision need to be made now?

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| ☐ A problem needs to be resolved | ☐ An opportunity has emerged |
| ☐ A deadline or commitment is approaching | ☐ Employees or customers are being affected |
| ☐ A process is no longer working effectively | ☐ A risk needs to be addressed |
| ☐ Other | |

4. What would a successful outcome look like?

Part 2: Examine the Information

Distinguish verified information from assumptions and gaps.



5. What do we know?

List the facts, evidence, data or direct observations supporting the decision.

6. What are we assuming?

Identify conclusions that have not yet been confirmed.

7. What information is still missing?

8. Are we relying too heavily on any of the following?

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|--|--|
| ☐ One person's perspective | ☐ A first impression |
| ☐ An isolated incident | ☐ Incomplete or outdated information |
| ☐ Previous practices that may no longer fit | ☐ Unverified AI-generated information |
| ☐ Pressure to decide immediately | ☐ None of the above |

Part 3: Consider People and Values

Look beyond the immediate outcome to fairness, consistency and impact.



9. Who could be affected?

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|--|---|
| ☐ Employees | ☐ Leaders |
| ☐ Candidates | ☐ Customers or clients |
| ☐ Suppliers or partners | ☐ The wider organization |
| ☐ Other | |

10. Whose perspective should be considered?

Include people close to the work, responsible for implementation or affected by the result.

11. Does the proposed decision align with our stated values?

- | | | | |
|------------------------------|------------------------------------|------------------------------------|-----------------------------|
| ☐ Yes | ☐ Partially | ☐ Uncertain | ☐ No |
|------------------------------|------------------------------------|------------------------------------|-----------------------------|

How is it consistent - or inconsistent - with those values?

12. Are we applying expectations consistently?

- | | | | |
|------------------------------|------------------------------------|-----------------------------|---|
| ☐ Yes | ☐ Uncertain | ☐ No | ☐ Not applicable |
|------------------------------|------------------------------------|-----------------------------|---|

13. Could this decision unintentionally disadvantage someone?

- | | | | |
|-----------------------------------|-----------------------------------|------------------------------|--|
| ☐ Unlikely | ☐ Possibly | ☐ Yes | ☐ More review is needed |
|-----------------------------------|-----------------------------------|------------------------------|--|

Part 4: Evaluate the Options

Compare realistic alternatives, including the consequences of not acting.



14. What realistic options are available?

Option 1

Potential benefit

Potential concern

Option 2

Potential benefit

Potential concern

Option 3

Potential benefit

Potential concern

15. Have we considered the option of not acting?

☐ Yes

☐ No

What could happen if no action is taken?

Part 4: Evaluate Risk

Identify the most important risks and how they might be reduced.



16. Which areas require consideration?

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| ☐ Impact on people | ☐ Operational disruption |
| ☐ Financial consequences | ☐ Privacy or confidentiality |
| ☐ Fairness and consistency | ☐ Legal or regulatory concerns |
| ☐ Reputation and trust | ☐ Ability to implement successfully |
| ☐ Other | |

16. What are the most significant risks?

Focus on the risks most relevant to this decision rather than trying to eliminate all uncertainty.

17. How can those risks be reduced or managed?

A decision may still involve risk. The goal is to understand the risk, assign responsibility and determine whether additional advice or approval is needed.

Part 5: Make and Implement the Decision

Record what was decided and what must happen next.



18. What is the decision?

19. Why was this option selected?

Record the main evidence, considerations and trade-offs behind the decision.

20. Who is accountable for implementing it?

21. Who needs to be informed or involved?

22. How will the decision be communicated?

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| ☐ Individual conversation | ☐ Team meeting |
| ☐ Written communication | ☐ Updated policy or procedure |
| ☐ Training or guidance | ☐ Other |

23. What support will people need?

Part 5: Review the Outcome

Decide in advance how and when the decision will be evaluated.



24. When will the outcome be reviewed?

Review date

25. What will tell us whether the decision is working?

Identify observable results, feedback or measures that can be reviewed.

26. What may need to change if the intended result is not achieved?

27. What did we learn from the decision and the process used to make it?

Final Decision Check

Complete this review before proceeding.



- ☐ We understand the problem we are trying to solve.
- ☐ We separated facts from assumptions.
- ☐ We considered the people affected.
- ☐ We sought appropriate input.
- ☐ We considered more than one option.
- ☐ The decision aligns with our organizational values.
- ☐ We considered fairness, risk and unintended consequences.
- ☐ Someone is accountable for implementation.
- ☐ We have a plan to communicate the decision.
- ☐ We will review whether it produced the intended result.

Pause before proceeding

Additional professional guidance may be appropriate when a decision involves:

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|---|---|
| ☐ Employment termination or discipline | ☐ Human rights or accommodation |
| ☐ Workplace safety | ☐ Personal, confidential or sensitive information |
| ☐ Significant financial or contractual commitments | ☐ Legal or regulatory obligations |
| ☐ High-risk AI or automated decision-making | ☐ A situation requiring an impartial investigation |

Closing thought

A sound decision is not simply one that produces the preferred result. It is one reached through a clear, fair and responsible process.