

Organizational Impact Score

Rate initiatives against the KPIs your organization already tracks, adjust for how sure you are, and see which work moves the numbers that matter most.



Impact

How much each initiative would move each KPI, scored from 0 to 5 and weighted by what matters most.



Confidence

How sure you are of those impact estimates. A guess counts for less than a number backed by data.



Ease

How hard it is to deliver, from 1 for very hard to 5 for easy. It separates big bets from quick wins.

HOW TO USE THIS TOOL

1 Set your KPIs

Keep the defaults or swap in the KPIs you track. Weights must total 100 (page 2).

2 List initiatives

Name up to six initiatives you are weighing (page 3).

3 Score impact

Rate each initiative from 0 to 5 on every KPI (page 4).

4 Check and rank

Add ease, then review the rank and suggested action (page 5).

5 Learn from it

See a worked example and common mistakes (pages 6 and 7).

FILL IT IN ON SCREEN

Click any field and type. Fields outlined in cyan are yours to fill in. Blue shaded fields calculate for you. Totals and ranks update automatically in Adobe Reader and most desktop PDF viewers. If your viewer does not calculate, use the matching Google Sheet, which does the same math and also works on a phone.



You fill in



Calculates for you

Step 1. Set your KPIs and weights

Use the KPIs your organization already tracks. Edit any name, weight, or measure. Weights must total 100. Two blank rows are ready for your own.

Organization or team	Time horizon (for example next 12 months)	Owner	Date

KPI	Weight	How we measure it	Current baseline and target
Revenue growth	20	New and expansion revenue	
Customer retention and satisfaction	15	Churn, renewals, NPS	
Cost savings and efficiency	15	Hours saved, cost avoided	
Strategic alignment	15	Fit with top company priorities	
Market reach and competitive position	10	New segments, win rate	
Risk and compliance reduction	10	Incidents, audit findings	
Team productivity and engagement	10	Cycle time, capacity freed	
Learning and data value	5	New insight or reusable capability	
	0		
	0		
Total weight (must equal 100)			

TIPS FOR CHOOSING KPIS

Pick the six to ten measures leadership already reviews. If you cannot measure a KPI today, say how you would. Give the most important KPIs the most weight, and keep any single weight at 30 or less so one measure cannot decide everything.

Step 2. List your initiatives

Name up to six projects, features, or bets you are weighing. Keep each description to what changes for customers or the business.

1 Initiative name What it is and who it helps Owner Rough cost or effort	2 Initiative name What it is and who it helps Owner Rough cost or effort	3 Initiative name What it is and who it helps Owner Rough cost or effort
4 Initiative name What it is and who it helps Owner Rough cost or effort	5 Initiative name What it is and who it helps Owner Rough cost or effort	6 Initiative name What it is and who it helps Owner Rough cost or effort

KEEP THE LIST HONEST

Compare initiatives of a similar size. If one item is a quarter of work and another is a multi year program, split the big one into phases. Fewer, clearer initiatives give a better ranking than a long list.

Step 3. Score the impact

For each initiative, rate how much it would move each KPI over your time horizon. Leave a cell blank if it does not apply.

SCALE: 0 None 1 Minimal 2 Small 3 Moderate 4 Strong 5 Transformational

KPI	Weight	Initiative 1	Initiative 2	Initiative 3	Initiative 4	Initiative 5	Initiative 6
Impact score (0 to 100)							
Confidence in estimates (%)		75	75	75	75	75	75
Confidence adjusted score							

Confidence guide: 100 means backed by data, 75 an informed estimate, 50 mostly a guess. Impact score = sum of (weight x impact) divided by 5, so an average impact of 3 scores 60.

Step 4. Review the ranking and decide

Add how easy each initiative is to deliver. The tool ranks by confidence adjusted score and suggests an action.

Initiative	Impact	Confidence	Adjusted	Ease 1 to 5	Rank	Suggested action

HOW TO READ THE SUGGESTED ACTION

Do now: adjusted score 50 or more and ease 3 to 5. Big bet: score 50 or more, ease 1 or 2. Quick win: score under 50, ease 4 or 5. Revisit: everything else. Treat scores within 5 points as tied.

CHECK THESE BEFORE YOU COMMIT

Move your two heaviest weights by 5 points. If the order changes, the ranking is sensitive. A high score with 50 percent confidence is a hypothesis, so find the cheapest test first.

OUR DECISION

Top priority

Sequencing and dependencies

What we will not do now, and why

Assumptions to test first

Approved by

Review date

Worked example (sample numbers)

Decision: Annual roadmap planning for a B2B software product team. All figures are illustrative.

KPI	Weight	Onboarding	Usage dashboard	SSO and audit	Release automation	AI assistant	Marketplace
Revenue growth	20	5	3	4	0	1	3
Customer retention and satisfaction	15	5	4	4	1	3	1
Cost savings and efficiency	15	2	1	1	4	4	0
Strategic alignment	15	4	3	4	3	3	2
Market reach and competitive position	10	3	2	4	0	2	5
Risk and compliance reduction	10	0	0	5	3	1	0
Team productivity and engagement	10	1	1	0	5	3	1
Learning and data value	5	3	5	1	2	4	2
Impact score (0 to 100)		64.0	47.0	62.0	42.0	50.0	35.0
Confidence (%)		80	70	90	90	50	60
Confidence adjusted score		51.2	32.9	55.8	37.8	25.0	21.0
Ease (1 to 5)		3	3	2	4	2	4
Rank		2	4	1	3	5	6
Suggested action		Do now	Revisit	Big bet	Quick win	Revisit	Quick win

What this shows: SSO and audit logs ranks first on adjusted score but is hard to deliver, so it is a big bet to plan and fund. Self serve onboarding is close behind and easier, so it starts now. Release automation scores lower on impact but is easy, so it fits as a quick win alongside.

DECISION

Start self serve onboarding now. Fund SSO and audit logs as a planned big bet. Slot release automation in as capacity allows.

NOT NOW

The AI assistant has high potential but only 50 percent confidence. Run a small pilot first.

REVISIT

Rescore after the next quarter, or sooner if renewal data changes.

Using the result well

FOUR MISTAKES TO AVOID

- 1 Scoring everything a 4 or 5.**
Spread your scores. If every initiative looks high impact, the ranking tells you nothing.
- 2 Using KPIs nobody tracks.**
If you cannot measure a KPI, you cannot tell whether the work succeeded. Start with what leadership already reviews.
- 3 Treating the score as the decision.**
It starts the conversation. Dependencies, timing, and capacity still matter, so use the rank with judgment.
- 4 Scoring alone.**
Have two or three people score on their own, then compare. The gaps show where the team really disagrees.

Need a second set of eyes?

We help leadership teams tie product investment to the KPIs that matter, as part of Fractional CPO + and Product Strategy engagements, from choosing the right measures to building the roadmap.

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