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Q3 Budget Triage Decision Matrices

This toolkit provides simple, visual frameworks to guide your Q3 budget triage process. Use these matrices to prioritize spend, evaluate projects, and create a strategic 'resurrection list' for next year.

1. Strategic Alignment vs ROI Matrix

Use this 2x2 matrix to quickly visualize which projects deserve priority.

	Low ROI / Impact	High ROI / Impact
Low Strategic Alignment	Consider cutting / pausing	Challenge business case
High Strategic Alignment	Re-scope or find efficiencies	Protect and double down

2. ROI Quick-Scan Table

Use this table to quickly assess which projects are worth continuing. List the key metric, current ROI (or qualitative impact), and your confidence level in the data. Ideally, you've already established KPIs for the project or initiative – but if not, define them now.

Project / Spend	Key Metric	Current ROI	Confidence (H/M/L)	Keep / Review / Cut
Example: Alliance Mgmt Tool	Adoption rate	1.5x improvement vs baseline	High-based on validated usage data from 3 consecutive months	Keep

Note: ROI can be calculated as financial ROI (net benefit ÷ cost), performance improvement (e.g., adoption rate increase vs baseline), or qualitatively (High/Med/Low) if hard numbers aren't available.

- High ROI + High Confidence = Protect or double down.
- High ROI + Low Confidence = Monitor closely before committing more resources.
- Low ROI + High Confidence = Candidate for cutting or re-scoping.

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3. Risk vs Benefit of Cutting

Prioritize low-risk, high-benefit cuts first.

	Low Benefit of Cutting	High Benefit of Cutting
High Risk if Cut	Cut last / get approvals	Evaluate carefully
Low Risk if Cut	Monitor	Cut first

4. Resurrection List

Document paused projects for future consideration.

Project	Reason for Pause	Metrics to Watch	Revisit Date	Owner