Embracing the Tension:
Managing Team Workloads

COMPLETE TRANSCRIPT

Module Overview
Welcome back to managing the unconventional. In this module we're going to be talking about managing your team's workload. We're going to talk about why managing workload is always a challenge, how to engage your team in exploring several strategies for managing workload, and what to do with key insights you gain as you experiment and evaluate. When you're ready download the viewing guide, work your way through the content, and then check out the additional resources we've put together in the next steps section.

Embrace and Engage

The Tension that Thriving Organizations Embrace
Managing team workload is always an interesting challenge. The first thing to realize is that this is not a *problem* to solve, it is a *tension* to manage. A problem to be solved is fixable. Solvable. We can make it go away. But workload is a tension that needs to be managed. It is never going to go away, and that's not a bad thing.   One of our unique traits as humans is that we have an opposable digit. This allows us, if we apply the right tension to do some pretty cool things...hold a pen, or throw a curve ball. Tension can be good if we manage it well. The organization, if it's healthy and growing, is always on this horizon of creating more work to do and determining when more hands are needed. There should be not too little and not too much work, and that's where the organization thrives, is by striking a balance, although balance may not be the right word. because truly it's next to impossible to achieve, it requires constant monitoring and adjusting and tweaking the dials to get it to work right for that season. In fact, this is part of what makes leadership so necessary. This system, your team's workload, is the system that you own, and it's perfectly designed to get the results that you're currently getting. We're going to look at different strategies you can explore to help manage this particular tension together. Let's take a look at how.

Engage Your Best Resource
The starting point for managing any tension is to get it on the table, so getting your team engaged in the conversation is the first step. This can include both one on one conversations as well as team gatherings. bringing your team together to have some good brainstorming and dialogue around this. how are we doing at managing a team workload? You're going to surface some great awareness of the system that you're managing. what's working? what's not working> what can we do about that? This is a great place to assess and evaluate what the current system looks like, how are workloads being distributed, how is the timing of workflows working out, what are some of the problem areas. Are we over or under on our capacity? Work to get that perspective on the table and create some awareness. With that awareness we can begin to explore the options for adjustments you can make to manage the team's workload. we could divide those into 2 types of adjustments. What could you do with the workload itself, and what

moves can you make with your people? In the next video we'll start by taking a look at dials that you may be able to tweak with the actual work itself.

Explore and Experiment

Workload Maneuvers

Ok, so we've engaged our team and created some awareness around the current situation. Now we're ready to start exploring and experimenting with options together. If there isn't enough work to keep everyone busy that's a great opportunity for you to grow and build the impact of your team by taking on new initiatives. In *this* module we're going to focus on things to try when you are feeling stretched as a team. So first let's walk through 3 things that you could do with the work itself: Accommodate, Eliminate, and Prioritize.

Accommodate. The first option we'll explore is accommodation of work, this is about taking advantage of scheduling and organizational rhythm to shift the timing of the work. Ideally, we might not want projects to all launch or come due at the same time. As you look at the regular rhythms of workloads, is there any work that could be shifted to a different time frame to help distribute the load. The goal here isn't necessarily that workloads to be equally distributed. Having higher productivity seasons where we push hard, followed by lower productivity seasons when we can recover may be something you do intentionally, as long as we avoid extremes of having impossible break neck pushes that burn everyone out, or times when we're just sitting around. In your viewing guide you'll find an exercise where you can roughly sketch out the fluctuation of your workloads over the course of the year. This might be an enlightening exercise to have your team members do individually.

Eliminate. Can we simplify our workload at all by getting rid of some of the things we do? There are 2 ways to look at this. First we can just ask, is there any work that we can just stop doing? Can any of our processes be simplified or streamlined? Secondly is there any work that could be eliminated by automation? Are there any duplicatable processes that could be automated? In other words, this isn't something that someone has to do manually over and over. Or maybe it is something that has to be done manually, but because we are doing it so many different ways and there's not a clear process it just takes extra time. So can we can refine the process, know exactly what the steps are, and make that an easier task that takes less time to accomplish? Really this is a process of looking at your workflows and looking at your procedures and just saying 'are these the most effective way to do it? Is there unnecessary work happening anywhere that we can just eliminate and simplify our process. .

Prioritize. Probably one of the key things as a manager is the prioritize. Prioritize. There are always going to be more key and important outcomes than you have resources to be able on deliver. Which means you're going to have to be identifying and keeping in front of you what *are* the priority outcomes so you can resource those things heavily. By implication this also means there are important outcomes that you are NOT going to resource. The hard part is people will always be screaming at you about the things not

getting done, which is why it's so important for you to know why you are not resourcing those things, because you have other key out right now that are more important. this is probably one of the biggest things you do as a manager is prioritize, say "these are the top three things right now." And recognize that these decisions are never perfect. Often you have incomplete information and you're on a rushed timeline and you have to decide. You're going to make imperfect choices and when you get the feedback that we need to shift priorities, that's OK, don't worry about what happened, move forward, reallocate resources. You're doing the best you can with the information you have to make decisions and move things forward, but ultimately you will have to prioritize certain things and remove resources from other things.

People Maneuvers

The other way we could think about this is what can you do with your people? What are the dials you can tweak with them? We're going to look at 3 people maneuvers that may be helpful: Collaborate, Rotate and Reallocate.

Collaborate. You can collaborate. In other words where does it make sense to put multiple people on one body of work? sometimes you can get a multiplied impact, maybe it's a hard task that is just nice doing with other people, or maybe truly it's more productive when you have that second hand there. I also would recommend thinking outside the box here, sometimes you could look outside your team and see if there's an ebb and flow of work that would make sense. Sometimes my people are not in their highest season when somebody else is and Vice Versa. Is there any way with some cross training that we could do some sharing of the work, or sharing of resources and help each other out when the loads are a bit heavier?

Rotate. The second people lever that you can pull is rotate. Rotate people. When there's a big project going on that's ongoing or a kind of work that's ongoing you can pull people off that and put others on. Give people a break from that work. You rotate them through it.

Reallocate. how can I alleviate some of my people by taking work away from them and giving it to someone else? 2 approaches here. First is through bringing in additional help. This could be interns that could come in and share some of that work for a season with my team. Are there places that I could call in for some reinforcements to alleviate some of the work from my team? The second approach is redistribution of works. Is there work that could be redistributed from one person to another on my team. You'll want to look individually at each of your' team member's capacities and ask yourself is there any work that could be shifted from one person to another. And while it's tempting to think about is this fair or not fair, really your job as a manager is to make sure the work gets done. So that s not the issue. The issue is where is there capacity and could it make sense to shift work from one person to another. Are there any circumstances that would make outsourcing work a good option?

Evaluate and Elevate

Unearthing Key Insights

As you experiment with these solutions you'll want to evaluate constantly. This is an ongoing thing, remember this is not a problem to solve, it's a tension to be managed. We want to be trying different things out. Asking as we go how did that work? Evaluating, tweaking the dials again. Keeping this conversation on the table with our team is a good idea, maybe that's' monthly or bi-monthly that we are re-looking at some of things we are trying. And evaluating them and constantly experimenting.

As we are experimenting and evaluating and tweaking dials, there are key insights that you can be sharing up with your supervisor. One could be things that are working. "Hey, we figured this works out pretty well. Maybe we want to share that information with other teams." The second could be concerns, maybe you've identified some gaps in our processes, some bodies of work that nobodies owning, or maybe just that persistent concern that maybe we are undermanned and we really do want to be thinking about adding headcount here. These are the types of things that you don't' want to manage alone. You want to be elevating these conversations with your supervisor and keeping that communication flowing.

As we close this module out, remember there are some additional resources attached to this module, so be sure to check those out. please reach out if we can support you in any way we'd be happy to. Have a great day and thanks for what you do as leaders!