



Embracing the Tension

Managing Team Workloads

viewing guide

Getting Started

1. Module Overview

Welcome back to managing the unconventional! In this module we're going to be taking a closer look at managing your team's workload. The goal is:

1. to understand why managing workload is always _____ >
2. how to engage _____ in exploring several strategies
3. what to do with key insights you gain as you _____ and _____.

Embrace and Engage

2. The Tension that Thriving Organizations Embrace

There's a difference between a *problem* to _____ and a *tension* that needs to be _____.

Draw the tension that thriving organizations manage well:



To think about...In what ways do you *own* the system?

*“Every system is
perfectly designed
to get the results
it gets.”*

W. Edwards Deming

3. Engage Your Best Resource

The starting point for managing any tension is to _____.

Here's a starter list for team conversation questions, add 2 questions of your own:

- how are we doing at managing a team workload?
- what's working?
- what's not working? what can we do about that?
- how are workloads being distributed?
- how is the timing of workflows working out?
- Are we over or under on our capacity?
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EXERCISE: Check out the *Capacity Snapshot Tool* in the additional resources section.

Capacity Snapshot Tool

Team Member	Jan	Feb	Mar	April	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
I am overextended and backlog is increasing												
I have to overextend to meet demand, have backlog												
I am at full capacity, able to keep up if I don't let up at all												
I have plenty to do and can keep up with a little margin												
I really could take on more work												
There isn't enough for me to do												

Time Frame (you can use months of the year or substitute an alternate time frame)

What are the two kinds of adjustments you can make to manage workload?

- 1.
- 2.

Explore and Experiment

4. Workload Maneuvers

What are the 3 maneuvers available to you with the work?

1. _____ - Taking advantage of timing, scheduling and rhythm.
2. _____ - Simplifying through purging, process improvement and automation.
3. _____ - Determining what NOT to resource.

What other maneuvers could you add to this list? Which of these is the most viable option to explore at this point?

5. People Moves

What are the dials you can tweak with in terms of people moves?

1. _____ - Multiplying effort by sharing work.
2. _____ - Cycling people on and off of a body of work.
3. _____ -

Evaluate and Elevate

6. Unearthing Key Insights

Think of some insights to share with your supervisor using this framework:

Things you've discovered were an improvement or have been work well	
Pieces of work that aren't being owned	
Communication gaps that create more work	
Situations you feel like adding personnel would make a big difference	

7. A LEADER'S PERSPECTIVE: Interview with Lisa Pike, Enviro

What from Lisa's perspective resonated with you?

What principle could be applied in your context? What would that look like?

8. Additional Resources

As we close this module out, remember there are some additional resources to check 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!

Articles

[Effectively Manage Team Workload](#)

[Dividing Your Team's Workload](#)

[How to Manage a Heavy Workload without Increasing Staff or Losing Efficiency](#)

Tools

The Capacity Snapshot Tool (below)

Team Workload Brainstorm Guide (below)

CAPACITY SNAPSHOT TOOL

Team Member:	Jan	Feb	Mar	April	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
I am overextended and backlog is increasing												
I have to overextend to meet demand, have backlog												
I am at full capacity, able to keep up if I don't let up at all												
I have plenty to do and can keep up with a little margin												
I really could take on more work												
There isn't enough for me to do												

Time Frame (you can use months of the year or substitute an alternate time frame)

Instructions:

1. The purpose of this tool is to gain awareness on how a team member views his/her own workload and capacity.
2. Assess and indicate where you feel your capacity is at along the specified time frames. e.g. "I am full capacity..." in January and February but come down to "I could take on more work" in March and April, etc.
3. Gather the snapshots from team members and look for trends, gaps or any helpful insight that might help you make workload decisions.

Team Workload Brainstorm Guide

Questions to Drive Brainstorming around Workload

Can we accommodate any of our work better by adjusting the timing/scheduling or rhythm?

Where would it help to add more people to a body of work? Are there any cross-functional partners we could help or reach out to for help?

What work could be eliminated by purging, improving process or automation?

Are there any projects, functions or bodies of work where we could give each other breaks by rotating responsibility?

What do we need to NOT resource right now? What are the top 3 most important initiatives/functions at the moment?

Is there any work that could be shifted from one person to another? Do we have access to interns? Could that make sense? Are there any work items that make sense to outsource?