

ASSESSMENT:

Where is there room to raise the bar in how you (and your people) manage priorities and workloads?

You can use this informal assessment tool to gain awareness for yourself or to assess others. It's also good to use as a tool to facilitate a clear, productive discussion.

It's broken down into key best practices corresponding to the following four areas of priority/workload management:

- **Personal Planning Practices**
- **Resisting the Noise**
- **Organizing Information**
- **Balance, Energy & Engagement**

ASSESSMENT: Personal Planning Practices

0 = NO OPPORTUNITY TO RAISE THE BAR▶ 10 = BIG OPPORTUNITY TO RAISE THE BAR

Planning. We all know how to plan but in a busy environment are we planning as consistently as we should?

- a. Yearly performance goals, special projects, leadership intentions and other strategic priorities are well mapped out, so that I know where to start, and what needs to be done by when.
- b. Priorities are being communicated well. I'm on the same page as my leader and my team are on the same page as me.
- c. Team meetings and one on one's reflect a reasonable balance between immediate issues and longer term priorities.
- d. My own development/ growth plan is in place. I'm clear on where I want my career to go and how I need to develop myself in order to get there.
- e. I'm good at keeping my long term priorities visible - making sure that they stay "in sight and in mind".
- f. The concept of "slowing down to speed up" is understood well. I resist the pressure to react, even when things are busy, taking the time to stop, think and put a plan together.
- g. I invest 15-30 minutes into weekly planning and 5-15 minutes into daily planning consistently. (as opposed to jumping into email first thing every morning)
- h. I dedicate (block off) a reasonable amount of time each week on my calendar to work on my true priorities, particularly those that tend to stay on the back-burner too often.
- i. My planning includes intentions around behaviours - how I want to "be". i.e. "today I want to really listen, inspire enthusiasm, appreciate the people around me, etc."

Opportunity to raise the bar?

ASSESSMENT: Resisting the Noise

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Resisting the noise. Are there times when we could react less? Are there situations where we could spend less time on small wins so that we have more time for big wins?

- a. Overreacting to some email.
- b. Reacting to some requests before clarifying real expectations and deadlines.
- c. Tasks that could and should be delegated to someone else.
- d. Being too involved in some tasks & issues (resisting the desire to control and have it done our way)
- e. Meeting time that could be shortened or even eliminated. (or at least planned better with more advance notice)
- f. Perfection. When is good enough, good enough?
- g. Time spent reaching consensus on lower priority issues.
- h. Taking on stray cats (tasks, requests, projects that may be fun, interesting and even add some value, yet ultimately detract from higher priorities).

Opportunity to raise the bar?

ASSESSMENT: Organizing Information

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Organizing. Capturing information so that we know where to get what we need, when we need it.

- a. My files and contact information—electronic and paper-based—are very well organized and as a result I always know exactly where to go to get information when I need it. (I never waste time looking for documents, e-mails, phone #'s, etc.)
- b. I am good at keeping my Inbox clear of all non-action messages.
- c. I keep my workspace clean of unnecessary clutter/ paperwork.
- d. I am good at tracking all of my tasks & follow-ups in one place (as much as possible) so that I can prioritize effectively and I don't stress myself out worrying about what I might be forgetting.
- e. I understand how task features of Outlook can help me track tasks and organize projects.
- f. I understand how to use email features of Outlook, like rules, organize and flags, to filter out low priority email and organize the email that I need to respond to.

Opportunity to raise the bar?

ASSESSMENT: Balance, Energy & Engagement

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Opportunity to raise the bar?

- a. I engage in personal interests/hobbies/passions that keep my attitude positive, engaged and energized.
- b. I put time into personal relationships and friendships that keep my attitude positive, engaged and energized.
- c. I set personal goals.
- d. I am clear on the link between the work I do and “What’s in it for me”.