A Framework for Managing Your Capacity

For high-achieving humans, slowing down often feels hard. Even unnatural. Perhaps it seems out of the question.

> *"If I can accomplish it, then I should accomplish it."* seems to be a pervasive underlying belief.
>
> Another common one is "*I've already said I'd do it, so I need to follow through*".
>
> A third is "*but I want to do/accomplish these things*".

So how do you reconcile being at/over personal capacity, with your own reasons for being in that situation (and any external ones)?

Use this framework as a tool for a practical exploration of your work-life portfolio.

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1. Check your mindset.

For achievers, one aspect of identity is the ability to accomplish difficult things and/or many things. The thought of taking some items off their plate feels like failure or lack of follow through. If that's you, I'll offer a reframe:

> "By choosing to take some items off my plate, I demonstrate my ability to strategically prioritize how I spend my time. I choose to proactively adapt to changing circumstances instead of being rigidly beholden to decisions made under past circumstances."

To be clear, I'm not suggesting that you simply drop the ball and not do something that someone else is counting on. But I will ask that you be open to the fact that many things in work and life can and should be (re)negotiated. In fact, the ability to (re)negotiate timelines, scope, responsibility, etc., with others in your personal and professional life is a critical skill for all modern adults. If you aren't yet comfortable with (re)negotiating, that's okay. It's a skill that anyone can cultivate.

If you still want to follow through on something just because you said you'd do it, despite changing circumstances, you're being stubborn not helpfully reliable.

So, take a few deep breaths. Reread the reframe quote if it is helpful. And commit to keeping an open mind throughout this process.

2. Compile all of the items that are in your work-life portfolio at the moment.

- If you already have a trusted system for capturing your active (and stalled or upcoming) projects, next actions, and ideas/possibilities you are ready to do a quick review to see if anything needs to be added before moving on. For capacity management, you'll focus on your existing and upcoming projects, not necessarily the next action list for each. Depending on the format of your trusted system, you may find it helpful to print out or put into spreadsheet form your list of projects.

- If you don't have a trusted system in place yet, you'll need to do a brain dump into a spreadsheet, text document, or old school paper notebook. Focus on capturing what's currently on your plate, personally and professionally and what is coming up soon.

3. Go through several iterations of categorizing each item in your portfolio.

Start with the first bullet below and read through your captured list, noting each item that fits the category. Then move to the second bullet and add its category to applicable items on your list. As you work down the list of bullets, some of your portfolio items will be assigned to multiple categories and some may be unassigned.

- (**T**) Is this item **Time sensitive** in the immediate future? It's helpful to know what these items are since they will likely *not* be good candidates for taking off your plate if you've already committed to them.

- (**E**) Is this an item you get some **Enjoyment** from doing? Enjoyment in this sense doesn't have to be pure fun or limited to personal/social activities. It could be something in your professional portfolio that you find really interesting to work on or to be involved in.

- (**D**) Could this item possibly be **Delegated** to someone else to complete? Don't focus on whether it would be a hassle to delegate it or if you'd rather do it yourself. In a later iteration you'll come back and rate the ease/hassle/feasibility of delegating an item.

- (**L**) Could this item be done **Later** when you have more bandwidth? In a later iteration you'll come back and rate the ease/hassle/feasibility of changing the timeline for the item's completion.

- (**C or I**) Is this item **Critical** to you or **Important** to you (personally or professionally)? A critical item could be moving a loved one into skilled nursing care or leading a high-stakes initiative that you could lose your job over. An important item might be attending all of your child's soccer games, achieving a known metric at work that earns you a bonus, or be an item that is part of a larger sequence of events such as earning a certification that will open new career opportunities to you down the line.

Now look at the items on your list that have not been included in a category. If it is helpful to you, come up with some new categories for them. It's also fine if they are not assigned a category.

4. Assign an intensity to each item in the Enjoyment, Delegation, and Later categories.

- For each item you assigned an E, give it a number from 1 to 5 where E5 is the highest level of enjoyment. Remember that assigning something E1 still means you enjoy it enough to put on the enjoyment list.
- For each item you assigned a D, D5 means something is pretty straightforward to delegate and D1 means yes technically you could delegate it but it would be a big hassle, etc.
- For each item you assigned an L, L5 means it would be relatively easy to put the item on hold and do it in the future and L1 means it would take quite a bit of renegotiation with others to do it later.

5. Review the items again and determine which can be reduced in Scope (S) from what you originally planned.

Whether or not you want to scale back, think about whether there is a reasonable lesser version or minimum viable version that would be acceptable. I like to think about doing "C" level work versus "A+" work. The grade of C represents an average outcome … and sometimes that is perfectly fine (yes, really). Remember, just because you already rated something as Critical or Important doesn't mean it can't also be scaled back.

Jot down some ideas for what the reduced scope could look like. What does a "C" level outcome look like? Are you in control of the scope yourself? If not, what would have to be renegotiated and with whom in order to scale back?

When you reduce the scope, does it make it easier/possible to Delegate? Does it change your Enjoyment level? Does it change the timeline to either Time sensitive or Later?

6. Make some decisions about what you will defer until later, will delegate, and will plain old not do.

There isn't any magic formula for this. It's up to your discretion.

To make your decisions, it can also be helpful to think through the downsides or consequences that may need to be planned for.

For items you are deferring, make sure you set a reminder of some sort to bring them back to your attention for review and a decision to act or defer again. You could defer them for a specific length of time and put a reminder in your calendar or you could put them on a list called "To Review Once a Quarter", etc.

For items you will delegate, jot down the parameters for what a successful outcome looks like, any pitfalls that must be avoided, timeline expectations, and how you'd like the person to communicate with you re questions or issues while they are working on it.

Give yourself a gold star or pat on the back for every item that you decide to remove from your portfolio completely and have no one do :)

7. Make a plan for renegotiating.

If you need to gain others' buy-in or permission to bow out (i.e., defer indefinitely), delegate, defer, or change scope, then take some time to jot down your rationale and approach.

Regardless of the approach you are advocating, it can be helpful to anchor the conversation in priorities. For example, if the conversation is with your boss you might start by reiterating the priorities that you are working on and explain that you've identified the responsibilities/initiatives/projects/tasks that you aren't able to move forward on until the other priorities are achieved. You have thought through some options for delegation, deferment, and modifications to scope/scale and would like to discuss.

8. Refactor your list of projects and implement your plan.

It's now time to clean up your revised list of projects. Some items will have remained unchanged, but you'll now have several items listed under "Projects to Delegate" or "Projects to Renegotiate" as well. And your "Deferred Projects" or "To Do Later" list will have several additions.

Start working through your delegation and renegotiation conversations.

9. Repeat this exercise as needed.

You may wish to include a quick version of this in your weekly review or monthly review. It can also be your go-to tool for whenever you are feeling overwhelmed.

10. Let me know how it's going.

Reach out with questions or feedback at: https://beburnoutproof.com/Connect.html