



WORKBOOK

TIME AND OVERWHELM

*Transformation*

CAREERVOLT, LLC



# INTRODUCTION

KUDOS TO YOU! YOU HAVE HAD ENOUGH OF PUTTING ASIDE YOUR REAL PRIORITIES IN PLACE OF MANAGING THE DAY TO DAY FIRES. INSTEAD, YOU ARE COMMITTING TO RECLAIM CONTROL OF YOUR TIME AND ENERGY, TO RECONNECT WITH THE JOY IN YOUR WORK.

WE'RE HERE TO HELP YOU BECAUSE 1) WE'VE BEEN IN YOUR SHOES AND 2) WE KNOW THAT IT IS POSSIBLE TO ESCAPE THE OVERWHELM AND CRAFT THE WORKDAYS AND CAREER THAT YOU DESIRE. THE FIRST STEP IS REMEMBERING THAT YOU HAVE THE POWER TO DO SO.

USE THIS WORKBOOK TO HELP YOU IDENTIFY WHAT PARTS OF YOUR WORK ENERGIZE YOU, AND WHAT PARTS ZAP YOU...

WHAT YOU WANT TO DO MORE OF, AND WHAT YOU'D RATHER NOT DO AGAIN...

AND WHICH STRATEGIES YOU WILL IMPLEMENT TO RETURN TO AN ENERGIZING AND PRODUCTIVE WORKDAY THAT FULFILLS YOU.

TO YOUR SUCCESS!  
JESSICA, SHEILA, AND THE CV TEAM



## GOAL GETTER

# SET YOUR GOAL

ACHIEVING OUR GOALS DEPENDS ON WHETHER WE TAKE ACTION. USE THE TABLE BELOW TO UNDERSTAND THE "WHY" OF YOUR GOALS.

GOAL: ex: To seek a major grant award within 12 months

WHAT WILL THIS GIVE YOU?  
ex: The funding to move Project 1 forward

AND WHAT WILL THIS GIVE YOU?  
ex: Resources/data for publications and for keeping people employed

AND WHAT WILL THIS GIVE YOU?  
ex: Demonstration of productivity/fundability to support promotion/tenure

AND WHAT WILL THIS GIVE YOU?  
ex: Job security

SO, WHY IS THIS GOAL IMPORTANT?  
ex: I'll be able to keep doing cool stuff with good people

## 3-STEP

# PROCESS

## Delegate–Decline–Design

### STEP ONE

OFFLOAD: GET ALL THE ACTIVITIES OUT OF YOUR BRAIN AND ONTO THE PAGE. THINK ABOUT WHAT'S TAKING UP YOUR TIME DAY TO DAY, WHAT'S ON YOUR LIST WAITING FOR YOUR ATTENTION, WHAT'S COMING DOWN THE LINE

### STEP TWO

PUT A \* NEXT TO ITEMS THAT REQUIRE YOUR SPECIFIC EXPERTISE OR SKILLS

PUT A ? NEXT TO ITEMS THAT SOMEONE ELSE COULD HANDLE

PUT AN X NEXT TO ITEMS THAT YOU CAN'T NECESSARILY DELEGATE BUT DON'T WANT TO DO

### STEP THREE

PLAN THE NEXT ACTIONS:  
WHAT IS ONE STEP YOU CAN TAKE TO DELEGATE ONE ACTIVITY (OR GET CLOSER TO DELEGATING)?  
WHAT CAN YOU DROP?  
WHAT STRATEGY CAN YOU DESIGN FOR COMPLETING THE "DO IT" ITEM?

# OFFLOAD YOUR BRAIN

TYPICAL ACTIVITIES OR WAYS YOU SPEND YOUR TIME

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
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UPCOMING ACTIVITIES OR ITEMS THAT KEEP  
FALLING OFF YOUR LIST/KEEP YOU UP AT NIGHT

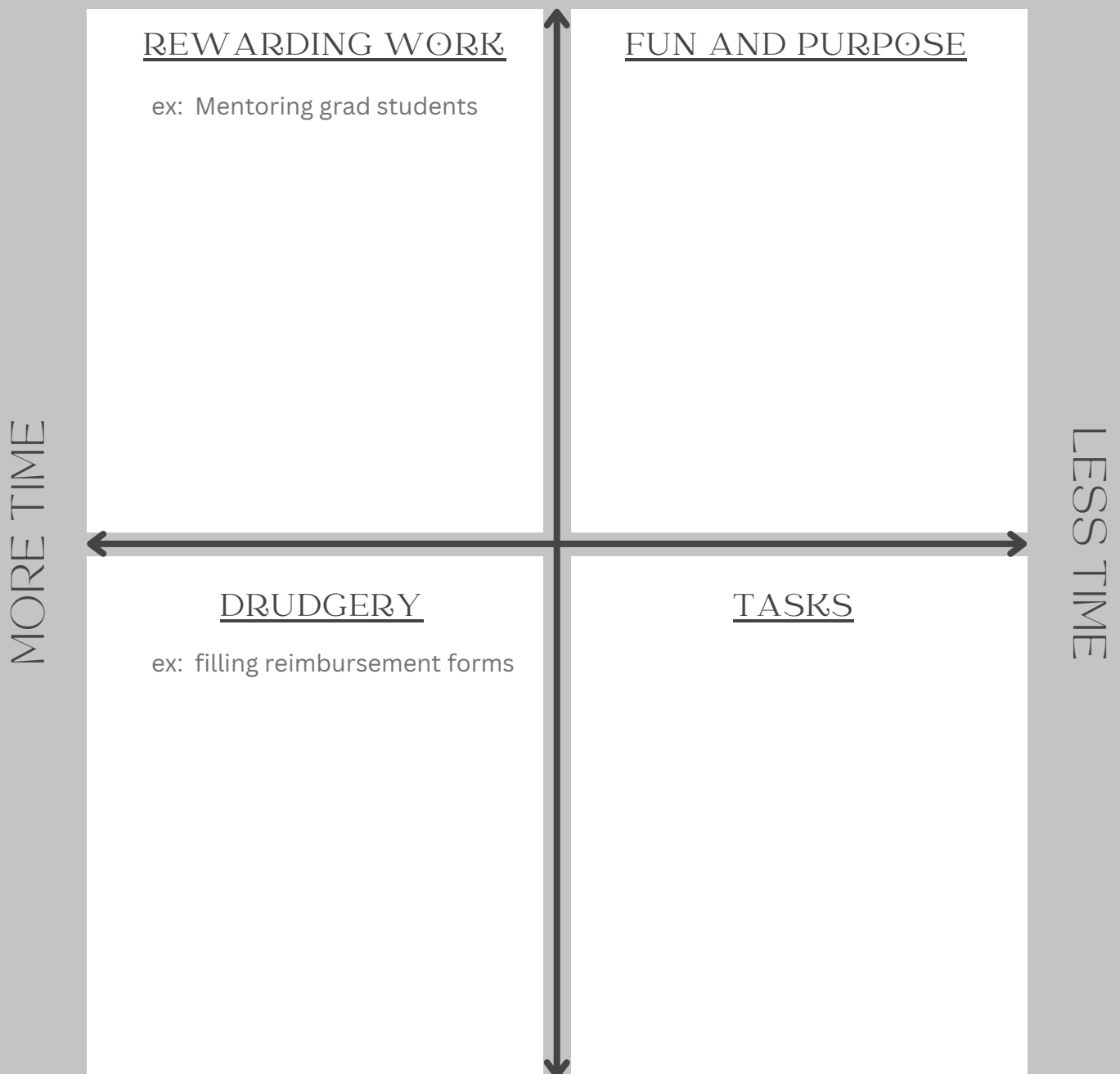
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## ZONE OF GENIUS

# TIME & ENERGY MATRIX

THE TIME & ENERGY MATRIX IS A GREAT WAY TO VISUALIZE WHAT PARTS OF YOUR WORK ENERGIZE YOU, AND WHAT PARTS DRAIN YOU, AND HOW TO BEST ALLOCATE YOUR TIME TOWARD THEM.

MORE ENERGIZING



LESS ENERGIZING

# DELEGATE-DECLINE-DESIGN

MOVE YOUR ACTIVITIES TO THE DESIRED BOX

## DELEGATE (NOW OR IN FUTURE)

ex: Reimbursement forms  
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## NEXT BEST STEP

ex: Identify an assistant (e.g., on Upwork) to occasionally support  
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## DECLINE, DROP, OR DO LESS OF

ex: leading grad student recruitment  
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## NEXT BEST STEP

ex: Plan and practice conversation to turn down this opportunity for right now  
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## DESIGN

ex: write manuscript on recent findings  
\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## NEXT BEST STEP

ex: 1. determine if any part of this could be delegated  
\_\_\_\_\_

2. plan writing timeline and block calendar  
\_\_\_\_\_

\_\_\_\_\_

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# FIRE PREVENTION

Fires that keep coming up	How I can solve the root cause proactively	Specific steps	By when
ex: submitting paperwork at the last minute	schedule a "paperwork afternoon" each month	block out a 3-hour "meeting" with myself every 1st Thursday	5pm today



# SYSTEM

# EMAIL TRIAGE

ORGANIZE	<p><u>FILTERS</u></p> <p>FILTERS AUTOMATICALLY DIRECT MESSAGES FROM CERTAIN PEOPLE OR CERTAIN TOPICS TO WHERE YOU WANT THEM</p>	<p><u>SUBFOLDERS</u></p> <p>KEEP LIKE MESSAGES TOGETHER FOR EASIER SEARCH/RETRIEVAL</p>
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!	<p><u>REPLY &lt;24 H</u></p> <p>MESSAGES THAT NEED QUICK ATTENTION FROM YOU</p>
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2	<p><u>REPLY</u></p> <p>NEED YOUR ATTENTION, BUT NOT TIME-RESTRICTED</p>
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3	<p><u>FYI</u> <u>(NO REPLY REQUIRED)</u></p> <p>PLACE READ/UNREAD MESSAGES HERE TO REVIEW LATER</p>
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4	<p><u>REPLIED</u></p> <p>MOVE MESSAGES FROM BOX 1 AND 2 HERE WHEN YOU'VE DEALT WITH THEM</p>
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# EMAIL HABIT TRACKER

WEEK OF: \_\_\_\_\_

	EMAIL BEHAVIOR	OUTCOME
MON	Ex: having email open all day	
TUE	Ex: checking email twice/day	
WED		
THU		
FRI		
SAT		
SUN		

# COUNTERING BARRIERS

# FACILITATE SUCCESS

WHEN THINKING ABOUT YOUR NEW HABITS, WHAT ARE SOME POTENTIAL BARRIERS THAT COULD PREVENT PROGRESS OR ADOPTION? WHAT ARE SOME COUNTERACTIONS YOU COULD TAKE TO AVOID OR OVERCOME THAT OBSTACLE?

## POTENTIAL OBSTACLE

## PLAN TO COUNTERACT

Ex: Want to delay checking email but I see my laptop on the way to the kitchen each morning, and stop to take a quick peek

Ex: I put my laptop in my bag before bed to create bigger barrier to the “quick peek”

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## REFLECTION NOTES

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# DECISION TREE

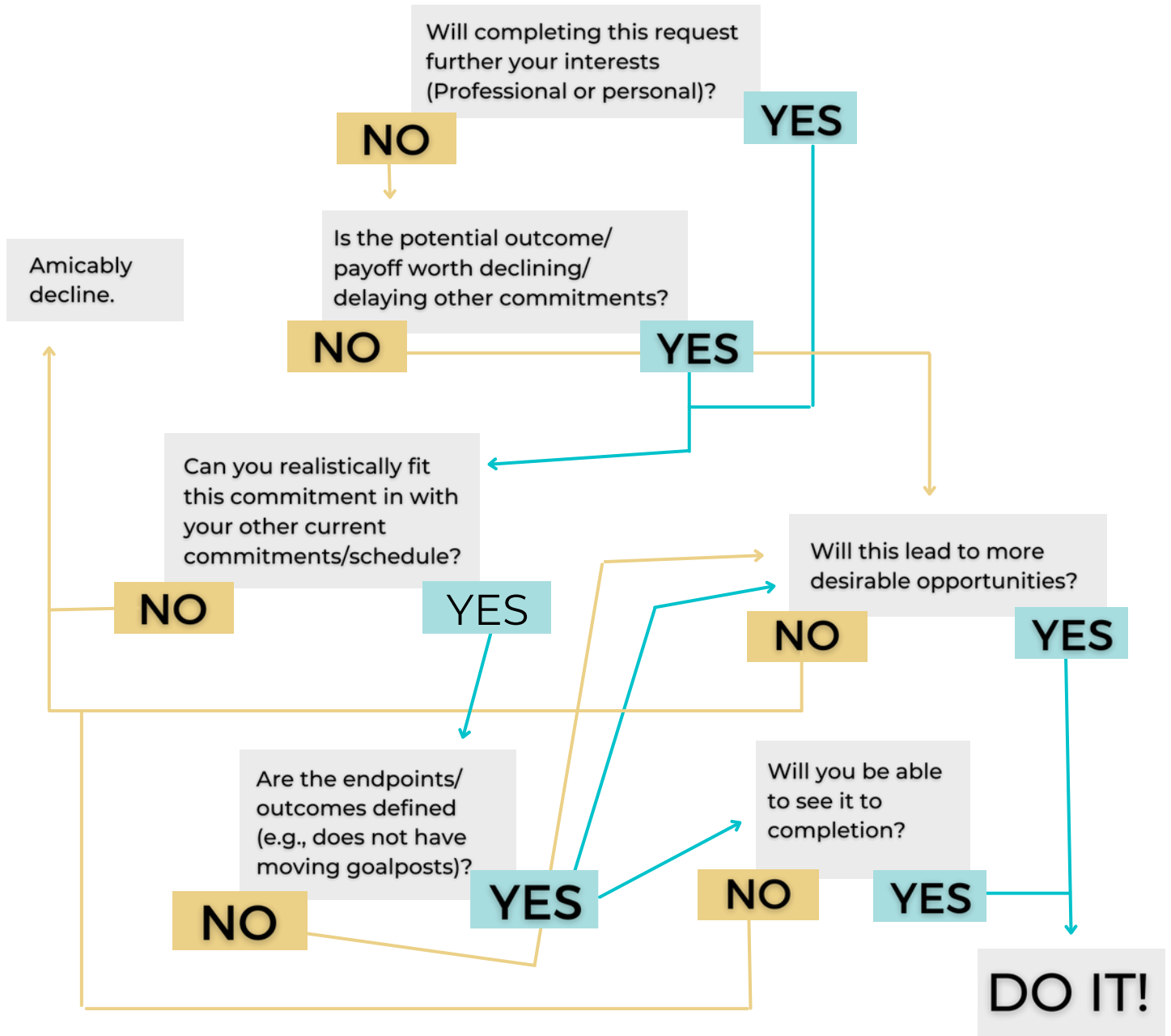
Demands on your time are only going to Increase.

Can you do all... the... things? NO!

This decision tree might help you decide when to say YES and when to say NO

"HEY DR. X., CAN YOU PLEASE DO....?"

Not all requests will be polite questions. Some may sound more like demands, or be presented by someone in a position of power.



## REMEMBER

- Saying no is not the end of the world
- Learning to say no is a skill you will develop
- Saying no allows you to fulfill your other commitments
- You don't have to explain your no

## REMEMBER

- Define your responsibilities and your time commitment before you say yes
- Stick to your guns
- It is OK to say no if the responsibilities/ time commitment changes from what you initially agreed to

## DECIDING TO DECIDE

# GIVE YOURSELF GUARDRAILS

OTHERS WILL ALWAYS TEST OUR BOUNDARIES. PUTTING GUARDRAILS IN PLACE CAN HELP YOU TO BETTER DEFEND YOUR BOUNDARIES OR KNOW WHEN TO ALLOW SOME FLEXIBILITY.

WHEN I OVERCOMMIT I FEEL...	ex: frazzled, anxious, sleepless
WHAT I WILL ASK MYSELF BEFORE I DECIDE WHETHER TO COMMIT	ex: How does it feel if I imagine saying yes right now?
HOW I WILL HELP MYSELF BE CONFIDENT IN MY CHOICE	ex: I considered the trade offs carefully and I know this is the best decision right now
WHAT WORDS WILL I USE TO SAY NO CONFIDENTLY AND EFFECTIVELY	
WHO I MIGHT HAVE MORE DIFFICULTY SAYING NO TO	
WHAT I GAIN WHEN I DEFEND MY BOUNDARIES	

G.R.O.W. TOWARD YOUR GOALS

# CREATE A STRATEGY TO PRIORITIZE YOUR PRIORITIES

HOW DO YOU WANT YOUR DAY-TO-DAY PRIORITIZATION TO LOOK? WHAT'S THE CURRENT REALITY? ONCE YOU KNOW THIS YOU CAN ASSESS YOUR OPTIONS FOR CHANGE AND CHOOSE SOMEWHERE TO START.

GOAL	REALITY OF TODAY	OPTIONS	WHAT ACTION(S) I WILL TAKE
ex: make daily progress on [big priority]	ex: constantly growing to-do list, and tackling low-priority items keeps me from getting to the big priority	ex: 1. delegate low-priority items 2. do/complete all low-priority items first 3. do big priority first 4. create a time-limited period for doing low-priority items 5. create a non-negotiable period for doing big priority item 6. ignore all low-priority items 7. go live on an island where no one can reach me	ex: create a non-negotiable period early in the day for my big priority

# Notes