

White Paper on the Road to Overcoming Overload



Title Imposed Roles (Part 2)

There is an old saying, “If you want to get something done, give it to a busy person.” Douglas Khan is one of these busy people. Doug is a Finance director in a fast moving industry and a demanding organization. As a highly motivated professional with a CA, CPA, and MBA, he is known in the organization as one who gets things done. Since finance touches almost all aspects of the business Doug is often asked or drafted to join strategic planning committees, marketing teams, quality improvement teams, and many ad hoc committees.

Doug’s life has become constant back-to-back meetings, urgent demands, and a growing list of expectations. Doug has fallen victim to “**Title Imposed Roles**”.

In any organization individuals and functions are given **titles**. The demands created by these titles are often dictated by the biases and needs of others. Ill-defined **title imposed roles** cause us to react to the urgent and excessive demands created by others. This often leads to miscommunication, disappointment, distractions, ineffectiveness, and/or burnout.

For example, by virtue of his title, “**Finance Director**”, the demands placed on Doug are often based on the assumptions and the historical experiences of those around him. Title imposed roles drive professionals like Doug to lose their focus and react to unrealistic expectations rather than a commitment to **BE and DO** the best that they can.

How about you? Most of us are like Doug. If properly motivated, we desire to give the highest value possible to our community and to those who are important to us. While we wish we could do more, we struggle with the burdens placed upon us. We try to prioritize but our “To Do” lists get longer and our goals seem to be more elusive.

The objective of this paper is to help you overcome “**Title Imposed Roles**”. Our goal is to give you a **building tool** that could help you define your roles, focus and

Note:

* This whitepaper is extracted from our book Overloaded? From overload to balanced living. See inside the book at www.amazon.com

* If this page was sent to you by a friend we invite you to subscribe to our e-letter “On The Road To Overcoming Overload.” Please go to <http://www.nomoreoverload.com/request.asp>



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prioritize based on the highest value roles that you can play on your various stages of life.

How Do You Define Critical Roles?

In a sentence, we recommend that you define your roles based on what you wish **TO BE**, not based on what you are asked **TO DO**.

Back in the 1600's Shakespeare presented us with wonderful imagery. He told us that **the whole world is a stage and all men "and women" are players on it. We each have our entrances and our exits and each, at different times, plays many parts.** On the stage of life we have an opportunity to play many roles. Conflicting priorities happen when we engage on **too many stages, play too many roles,** and/or take on **"title imposed roles"**. Success depends on our ability to choose the most appropriate highest value roles and fulfill them with excellence. We encourage you to prioritize and focus on **the roles that bring the greatest impact to the lives of the people most important to you.**

On a theatrical stage the success of an actor is not so much based on his or her ability to recite the text or act the motions as much as it is on the ability to embody the qualities and attributes of the character he or she portrays. On a theatrical stage what we are expected **TO BE** directs and defines what we are expected **TO DO**, not the other way round.

The same applies on the stage of life. Your success is not based so much on the **DO** part of your role as it is on the **BE** part of the role. What you are expected **TO BE** should drive and define what you are expected **TO DO**. Regretfully, we often focus on **DOING** all that is demanded and neglect **BEING** the right character in relationship to our important people.

Solution

Let us assume that, like Doug, on the professional stage of your organization you hold an important function. For that function you are given the title **"Manager"**. The expectations this title places on you will vary based on who is addressing you, their assumptions, and what they expect you to do for them.

Moving away from **"title imposed roles"** allows you to redefine your presence on that stage by breaking your functional title into more specific roles such as **coach, model, resource, overseer, watchdog etc.** Having done this, you can decide which of these roles deliver the highest value and deserves your focus.

Diagram 1 is a process highlighting that:

1. **Your functional title** is made up many of **roles**.
2. The best way to define each of these roles is to associate what you are expected to **BE** to a set of attributes or adjectives.
3. Attributes can guide you in expressing your role in clear **objectives**. Objectives are a statement of faith that indicates what you would like to see happen as a result of playing your roles.
4. Objectives can be translated into **SMART** goals.

SMART goals should be articulated in Specific, Measurable, Agreed upon, and Time dependent activities that are reflected in your diary and time commitment

Diagram 1 highlights that a **function** is made up of **roles**. The best way to define each of these roles is to associate what you are expected to **BE** to a set of attributes or adjectives. These attributes can guide you in expressing your role in clear **objectives** that can be translated into SMART goals and activities.

Objectives are different from goals. **Objectives** are a **statement of faith** that indicates what you would like to see happen as a result of playing your roles. Clear objectives can be translated into goals. **SMART** goals should be articulated in Specific, Measurable, Agreed upon, and Time dependent activities. **SMART** goals are reflected in your diary and time commitments. This will help you focus, prioritize and communicate what you expect **TO DO**.

Having identified and communicated your higher value roles and objectives, you will be empowered to eliminate or delegate lower value roles and objectives. Your clearly expressed roles and objectives will give you the tool to filter out the demands created by **title imposed roles**.

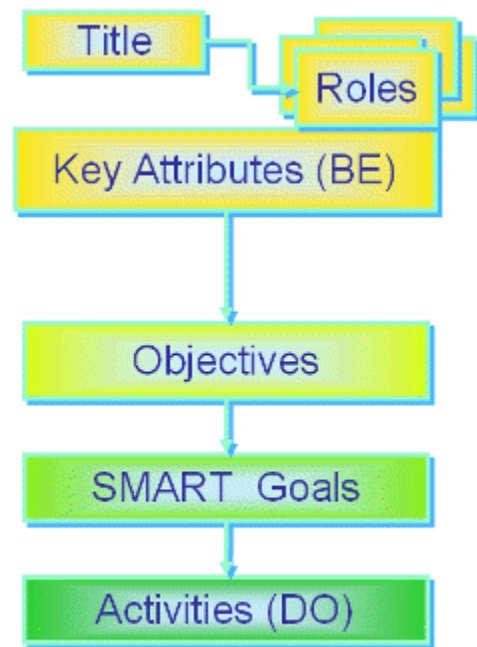


Diagram 1

Exercise:

The following detailed three part step-by-step exercise will help you develop, define, communicate, and negotiate your high value roles to the important people around you.

PART ONE: Developing Your Roles:¹

1. Take a blank sheet of lined writing paper and give it the heading **“TO BE”**. On the left side mark a column wide enough to place a one-word list of roles.
2. List all the reasonable roles that relate to your professional stage. Be creative but realistic, avoiding commonly used titles.
3. Take another blank lined sheet. On the top half of this sheet write the heading **“TO DO” Objectives**. Here you will record what you wish to see happen as a result of playing your roles. On the bottom half write the heading, **“ELIMINATE – DELEGATE”** Here you will write what you can eliminate or delegate in order to have more space to focus on your higher value roles.
4. Now you have a **simple survey form**. Take this set of two papers and make ten photocopies of each to use later in the validation process.
5. Find a place where you can have some good thinking time. Consider your talents and abilities. Recall the roles you have enjoyed the most. Recall compliments and positive feedback you have received. Let these thoughts direct your biases and opinions.
6. On the first survey paper, take the **“TO BE”** sheet of roles you listed and choose the five roles that **you deem most valuable** and prioritize them 5 to 1, with 5 being the most important role.
7. Against each of the five top roles **write the five best adjectives or character attributes** that you believe most accurately describe this role. For example, if you choose the role **“coach”**, appropriate attributes may be **“disciplined, knowledgeable, wise, committed, and available**. Prioritize these attributes on a scale of (5 to 1) with 5 being most important

¹ For a template and tables listing roles and attributes, please e-mail your request by [Clicking here](#).

8. Take time to contemplate the attributes you selected for your important roles. What positive images do they communicate? How do you picture your priorities and activities changing to fulfill such attributes?
9. On the “TO DO” sheet list the **top objectives** you wish to **accomplish** if you were to succeed in that role. Start every statement with an active verb. Prioritize the **top 5 objectives** rating them as **5 to 1**. This list can later help you form your tangible and non-tangible **SMART** goals. Where possible, be specific and realistic.
10. There is a simple fact; you can never start something without stopping something. List what you could eliminate or delegate in order to make room for your new or revised roles. Write your thoughts down. Again prioritize this list on a scale of 5 to 1 with 5 being most likely to eliminate or delegate.
11. Now you have a picture of what you wish your role **TO BE** and **TO DO**. This picture is a powerful one based on your personal biases and interest but to make it most effective it must be validated by your important people.

PART TWO: Validating Your Roles:

On a theatrical stage the success of an actor is highly dependent on the support and cooperation he or she has from others who share the stage. The same applies on the stages of life. With this in view, we believe that while you are ultimately responsible for selecting and defining your roles and objectives these need to be validated and supported by your important people.

You may ask how to define important people. Using the metaphor of a sports team where you are the captain of that team, we suggest that there are two groups that form your important people. They are:

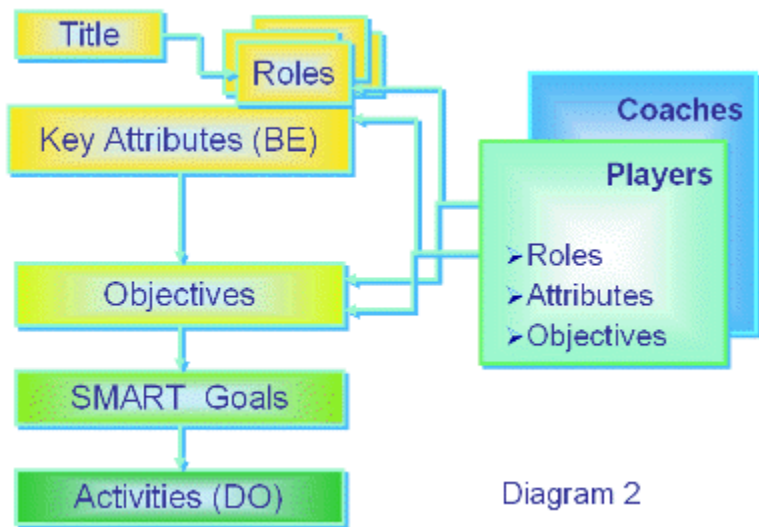


Diagram 2

1. **The people who HELP you define and shape your roles.** These are people who are interested in your development and can help give positive input into your life. These we will call your **coaches** and

2. **The people who are most CRITICAL to the achievement of your objectives and goals.** These are people who are open to your positive input into their lives. These we will call your **players**.

Diagram 2 illustrates the following steps and will guide you in validating your roles.

1. Having completed the process of recording your own roles, attributes, and objectives, you need similar survey input from your important Coaches and Players. Your **survey participants** should include:
 - a. **At least 5 coaches.** Consider people whom you look up to - people who can give positive input into your life and help you in defining your roles. These could be people you strongly respect or people to whom you are accountable.
 - b. **At least 5 Players.** Consider people who complement you on the stage. These are likely people who are critical to the achievement of your objectives and goals.
2. Take the ten sets of photocopies you made in Step 4 of Part One. Provide each of the ten important people you listed with one set each. Explain the process you completed in Part One without revealing the input you wrote.
3. Ask your important people to follow the same process and to provide you with their input as they consider how you can improve **the impact you can make** on their lives and others.
4. Ask them to return the completed sheets to you within two weeks.

Please note that important people will differ depending on the stage of life you are considering. They will also differ based on the role you are considering or the roles you want to play.

PART THREE: Enhancement:

1. Once you have received the input of your important people you have an excellent **thinking and discussion tool**. You will no doubt see some opinions that will differ from yours. You may notice that:
 - a. Your input was biased by your personal talents and desires and that is good.
 - b. The input of your coaches may be biased by the growth opportunities they see for you in your various roles. That is very good.
 - c. The input of your players may be biased by what they see as their need and what they expect you to do for them. That is natural.

2. Do not discount the wise and sincere input of your important people. Take time to:
 - a. Review the input you have received with your important people.
 - b. Use their input to enhance your role definitions and refocus your objectives. Do this without abdicating your ultimate responsibility to define your roles and committing to your own objectives.
3. Write a clear and simple definition of your top five roles using the most descriptive attributes.
4. Write the five most important objectives that you wish to focus on indicating what you would like to see happen as well as the SMART goals and activities you would undertake to achieve such accomplishments. Be sure to add a target completion date for each activity.
5. Share your final copy of roles, objectives, and goals with your important people. Where appropriate, seek their help in holding you accountable to the needed disciplines.
6. Now you are ready to implement your successful role strategy by training yourself for the most valuable roles and attributes as well as acting to execute the most valuable objectives.

What you have created here is a **dynamic tool - not a static job description or a restrictive straitjacket**. This tool needs to be frequently tuned in relationship to your changing world. As your world changes, or even periodically, review your roles and attributes, your objectives and goals. Communicate frequently with your important people, making appropriate changes to enhance the impact you have on them and others.

Applying Your Role to the Differing Stages of Life:

The process we shared can be applied to the varying stages of life. Life stages are many but they can be placed in three groups.

- **The Personal / Family stage** includes interactions with yourself, immediate, and extended family.
- **The Business/ Professional stage** includes colleagues, employers, employees, customers, suppliers, and regulators.

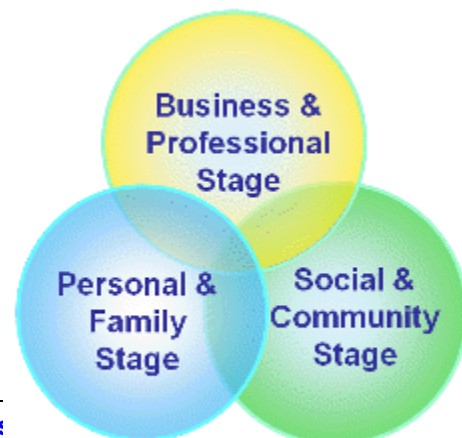


Diagram 3

- **The Social / Community stage** includes aspects of your community, social, and political life.

In **Diagram 3** you will note the overlapping circles. This overlap is designed to highlight the fact that great benefit can be realized if you can play similar roles on differing stages. This will help you leverage similar attributes and develop similar goal related disciplines.

For example, if you have chosen to act as a coach on the Business Stage it could be of great value if you see yourself as a coach to teenage children on the Family Stage and/or a coach to a community fundraising event. In a similar manner, if you were called on to be a controller of the family finances you may find this experience helpful as you try to control critical projects at work or volunteer to control some operational tasks in your community hospital.

Leveraging your skills:

Having applied the concepts and process we described above, you will find that the same is transferable to the organizational realm. Used with creativity this tool can be applied to most organizational functions or committees.

Summary:

- Life demands will always increase. Misled by our titles, others impose expectations upon us that are based on their assumptions and biases. This is often a cause for overload.
- Life provides you with the opportunity to play many roles on its various stages. We encourage you to raise your value contribution by focusing on your highest value roles and their related objectives and goals.
- While seeking the input of a few important people, take ownership of this evolving process that can impact your professional, personal, and social life.

The value of our lives is not measured by what we make but rather by the impact we leave on the lives we touch while on the stage of life.

Play your role with excellence. Have some fun doing it.

It is worth it.

*The names and titles are changed. The experience is based on participants in our [Overcoming Overload Workshop](#).