

Thoughts and Tips on the Road to Overcoming Overload



Be the Best You Can Be A Self Directed Coaching Process

This paper provides **thoughts, tips, and tools** to help leaders focus their roles and gauge personal progress. As a creative, self-motivated leader you hold many important roles on the corporate stage of your organization. These days the stages on which we perform our roles change rapidly. The pace of life and its competing priorities lead us to lose our focus and dilute our effectiveness. Effectiveness is highly dependent on our **ability to focus our roles, prioritize our objectives, and accomplish related goals.**

Believing that effectiveness and focus are personal responsibilities, the purposes of the following exercises are to:

- Help you and others you coach improve effectiveness by providing **thoughts, tips, and simple tools** that can guide leaders and knowledge workers in focusing their roles and communicate them to the important people who share the stage with them.
- Provide a simple **self management and progress tracking tool.** This same tool can also be used as a coaching tool for leaders who seek to help team members stay focused on agreed upon roles and objectives.

Each of these tools can be used independently of each other but they are more useful when used together. As these are thinking and communication tools, you will find that with practice they become easier and more profitable.

This exercise is most helpful when supported by someone you trust and who can appreciate your roles. Having such a coach in your life can help you maintain your focus and enhance your effectiveness. It may be helpful, **but not essential**, if such a coach is someone who is in a position of organizational authority over you. Please note that how often you engage in this exercise and the progress review totally depends on your personal needs and the pace of changes you are going through.

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>



[Baha & Margaret
Habashy](#)

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1. Roles:

Most of us are hired into the organization using **job titles**. These often fall short on defining priorities and the high value roles we are expected to play. As a result, the demands placed upon us by virtue of our titles are totally based on the needs, assumptions, and historical experiences of the varied individuals and groups with whom we interact. Each demand, once fulfilled, becomes a de facto part of the job title reducing our focus and adding to the ever growing to do list.

The following exercise is designed to help you prioritize your many roles. the Appendix of this paper holds a list possible roles you may play.

- Examine the sample roles listed below. To the best of your knowledge select the **5** most important roles you believe you are expected to play **on the stage of your organization. Try to avoid roles that have become common titles in your specific profession or organization. Hopefully these are roles you are good at or enjoy playing.** You may add other roles you like that you consider important.
- Prioritize the roles you selected Number the roles you selected in order of priority with **5** being most important and **1** least important.

2. Attributes:

How we do what we do is often more important than what we do. As you perform the roles you selected in Step One, what are the most important **character attributes** that you need to exhibit in performing these roles? In other words, what are the most important **adjectives** that will describe you? The following exercise can help you describe and clarify your roles. Listed below are 34 groups of attributes. To the best of your knowledge:

- A. Select the **5** most important groups you believe you are expected to demonstrate then highlight the attribute that appeals to you the most. Hopefully these are attributes that match your natural talents or skills. If you need to, add attributes that are not on the list that you feel strongly about.
- B. Number the attributes you selected in order of priority with **5** being most important and **1** least important.

3. Sphere of Accountability and Objectives:

The sphere of accountability is the stage on which your attributes are expected to shine, where your effectiveness is maximized and/ or where your key objectives are realized. The sphere of accountability is the area where you **are held accountable for specific accomplishments and outcomes**. In the sphere of accountability it is expected that you are given **authority** to make choices and you are **empowered** to take actions. The sphere of accountability is different from your **sphere**

of influence where you **may influence others' decisions and choices with no control over the outcome.**

Objectives are statements of faith reflecting what you believe you are called to accomplish in relationship to your sphere of accountability. Good objectives **can be stretching but must be realistic.** It is helpful if they are measurable or can be associated with other tangible or non tangible **goals and activities.** Good objective statements are easier to write when you start them with an **active verb.**

- A. In the table below list the **5** most important areas that you consider to be your sphere of accountability. Number these areas in order of priority with **5** being most important and **1** being least important.
- B. For each of your spheres of accountability list **1 to 5 key objectives** that you aim to accomplish in the coming next **3 – 6 months.** If you wish, you can add some long term objectives at the end.

Rating 5-1	Sphere of Accountability	Objectives
		<input type="checkbox"/> - <input type="checkbox"/> - <input type="checkbox"/>
		<input type="checkbox"/> - <input type="checkbox"/> - <input type="checkbox"/>
		<input type="checkbox"/> - <input type="checkbox"/> - <input type="checkbox"/>
		<input type="checkbox"/> - <input type="checkbox"/> - <input type="checkbox"/>
		<input type="checkbox"/> - <input type="checkbox"/> - <input type="checkbox"/>

Goals are critical in developing our focus and establishing correct life management. A life well lived is measured by the good goals we achieve. While objectives are a statement of faith of what you want to see happen, goals are your action plan of how these objectives will be realized. For each of your objectives write **SMART** goals that will guide you. **SMART** goals are:

- **S**pecific
- **M**easurable
- **A**greed upon by all concerned
- **R**easonable
- **T**ime dependant. To be time dependant your goals must be reflected in action plans or a set of activities that are recorded in your time calendar or time management tool.

4. People / Communication:

The value of our objectives is directly related to the impact we have on the people or groups with whom we interact. Very often our vital role and objectives can be compromised in the absence of a good relationship. Good communication plans are important to cultivating and protecting good relationships. Take time to list the **important people** that you need to communicate with. It is critical to be intentional and clarify your communication plans with your important people.

Please list your important people or groups noting the most helpful or preferred communication frequency, plans, tools or preferences.

Person or Group	Communication Plans, Tools or Preferences
•	<input type="checkbox"/>
•	<input type="checkbox"/>
•	<input type="checkbox"/>
•	<input type="checkbox"/>
•	<input type="checkbox"/>
•	<input type="checkbox"/>
•	<input type="checkbox"/>
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•	<input type="checkbox"/>
•	<input type="checkbox"/>
•	<input type="checkbox"/>

5. Progress Dashboard:

The objective of the following self-managed dashboard is to help you:

- A. Maintain focus amidst increasing demands and conflicting priorities
- B. Gauge individual progress towards fulfilling personal objectives that are supported, where possible, by clear measurable progress indicators
- C. Document encouraging achievements that are often ignored or forgotten
- D. Highlight issues, concerns, and critical communication with important people or groups
- E. Provide a clear communication tool in support and healthy accountability
- F. Reduce the administrative burden and possible conflicts that are often associated with performance review.

The following page provides a template that you can update weekly, biweekly or monthly.

1. HOW ARE YOU? How are you being?

Personal and family health affects our being and impacts our performance in all our roles. This **health check** is very subjective and totally depends on how you are feeling at a particular moment. Rate the spiritual, physical, emotional, and financial health of yourself and your family. In a similar manner, if you oversee others take the pulse and record the health of your team. While this is an indicator of your perceptions it serves as a good touch point, and where appropriate, a discussion opener between caring individuals.

The focused attributes refers to the character attributes that you or your team committed to focus on as you live your roles among those in your circle of accountability.

2. HOW ARE YOU DOING?

- A. Key Objectives and Milestones** are what you wish to accomplish or summary of the objectives you listed in your objectives exercise. For progress tracking indicate this period and the previous period % of completion.
- B. Key Indicators** are measurable yardsticks, outcomes or the evidence of accomplishment for your stated objectives. These must be specific. As yardsticks they indicate progress as well as possible shortfall towards the end line.
- C. Notable Achievements and Communications** are important to record especially if objectives achievements are NOT measurable. They may be the result of effective communications or rewarding relationship building activities.
- D. Issues and Concerns** highlight risks that may call for special or extraordinary actions. In this space record issues and concerns that are within your circle of accountability and where you are empowered to take corrective action. Persistent concerns that are brought forward (B/F) from a previous period should also be recorded so they are highlighted and not overlooked.
- E. Recommendations or Requested Action** document issues and/or concerns that may impact your progress **but may be out of your circle of accountability**. Here you call on the support, or the intervention of others who share the leadership stage with you.
- F. Received by/Date** is a record, if needed, of when this review was received or discussed by your coach or organizational leader.

NOTE:

Make copies of the following page for your personal use. This is to be prepared by you, not by your coach. Above all else, it is for your own benefit. File it for future reference and year end consolidation.

If you are using this as a tool to help you coach your team, make sure that **they prepare it carefully** for their individual benefits. At individual progress review or coaching session ask open ended evaluative, encouraging and supportive questions. For future reference and accountability write your observations and/ or advice on the back page for future reference and/or year end performance review.

Note: For an MS Word copy of the following template please go to
<http://www.nomoreoverload.com/Data/Templates/ProgressReport.doc>

ROLES LIST

- | | | |
|---|---------------------------------------|---|
| <input type="checkbox"/> Activator | <input type="checkbox"/> Enforcer | <input type="checkbox"/> Observer |
| <input type="checkbox"/> Administrator | <input type="checkbox"/> Enabler | <input type="checkbox"/> Organizer |
| <input type="checkbox"/> Advisor | <input type="checkbox"/> Encourager | <input type="checkbox"/> Overseer |
| <input type="checkbox"/> Advocate | <input type="checkbox"/> Enforcer | <input type="checkbox"/> Participant |
| <input type="checkbox"/> Arbitrator | <input type="checkbox"/> Entrepreneur | <input type="checkbox"/> Partner |
| <input type="checkbox"/> Authority | <input type="checkbox"/> Executive | <input type="checkbox"/> Peacekeeper |
| <input type="checkbox"/> Boss | <input type="checkbox"/> Facilitator | <input type="checkbox"/> Peacemaker |
| <input type="checkbox"/> Builder | <input type="checkbox"/> Friend | <input type="checkbox"/> Planner |
| <input type="checkbox"/> Catalyst | <input type="checkbox"/> Guard | <input type="checkbox"/> Problem solver |
| <input type="checkbox"/> Champion | <input type="checkbox"/> Guide | <input type="checkbox"/> Promoter |
| <input type="checkbox"/> Change agent | <input type="checkbox"/> Helper | <input type="checkbox"/> Prospector |
| <input type="checkbox"/> Coach | <input type="checkbox"/> Influencer | <input type="checkbox"/> Provider |
| <input type="checkbox"/> Commander | <input type="checkbox"/> Investigator | <input type="checkbox"/> Resource |
| <input type="checkbox"/> Communicator | <input type="checkbox"/> Interrogator | <input type="checkbox"/> Sounding board |
| <input type="checkbox"/> Counselor | <input type="checkbox"/> Leader | <input type="checkbox"/> Supporter |
| <input type="checkbox"/> Craftsman | <input type="checkbox"/> Listener | <input type="checkbox"/> Teacher |
| <input type="checkbox"/> Creator | <input type="checkbox"/> Manager | <input type="checkbox"/> Team player |
| <input type="checkbox"/> Decision maker | <input type="checkbox"/> Mediator | <input type="checkbox"/> Trendsetter |
| <input type="checkbox"/> Diplomat | <input type="checkbox"/> Mentor | <input type="checkbox"/> Troubleshooter |
| <input type="checkbox"/> Developer | <input type="checkbox"/> Model | <input type="checkbox"/> Visionary |
| <input type="checkbox"/> Devil's advocate | <input type="checkbox"/> Motivator | <input type="checkbox"/> Watchdog |
| <input type="checkbox"/> Director | <input type="checkbox"/> Negotiator | <input type="checkbox"/> Whip |

Character Adjectives or Attributes

- **Ambitious**, Energetic, Goal oriented, Hard working, Motivated, Self disciplined
- **Action Oriented**, Impatient, Learning, Practical, Results oriented, Tenacious
- **Adaptable**, Calm, Flexible, Productive, Reassuring, Responsive
- **Analytical**, Dispassionate, Interrogative, Logical, Objective, Rigorous
- **Coordinative**, Adaptable, Creative, Flexible, Innovative, Resourceful
- **Belief and Values Oriented**, Altruistic, Dependable, Family-oriented, Responsible, Spiritual
- **Commanding**, Clear, Confrontational, Direct, Honest, Risk taking
- **Communicative**, Articulate, Captivating, Conversational, Descriptive, Expressive
- **Competitive**, Aggressive, Aspiring, Challenging, Driving, Striving,
- **Connected**, Accepting, Caring, Considerate, Humble, Spiritual
- **Consistent**, Balanced, Ethical, Even handed, Fair, Unprejudiced
- **Context Oriented**, Counterintuitive, Experienced, Interrogative, Perceptive, Reflective
- **Deliberate**, Careful, Contemplative, Private, Serious, Vigilant
- **Developing**, Challenging, Coaching, Encouraging, Helpful, Nurturing,
- **Disciplined**, Efficient, Exact, Orderly, Predictable, Structured,
- **Empathetic**, Anticipating, Appreciative, Kind, Sensitive, Understanding
- **Focused**, Collaborative, Efficient, Goal oriented, Independent, Impatient
- **Futuristic**, Energizing, Foresighted, Inspirational, Motivating, Visionary
- **Harmonious**, Agreeable, Deferential, Non-confrontational, Peaceable, Personable
- **Ideas Oriented**, Abstract thinking, Contemplative, Conceptual, Creative, Visionary
- **Inclusive** , Accepting, Connecting, Loyal, Non-judgmental, Social
- **Individualizing**, Encouraging, Impatient, Intuitive, Listening, Observant
- **Acquisitive**, Quick to learn, Inquisitive, Interested, Interrogative, Studious
- **Intellectual**, Inquisitive, Introspective, Reflective, Studious, Thoughtful,
- **Studious**, Assimilative, Energetic, Inquisitive, Motivated, Studious
- **Maximum Oriented**, Demanding, Discriminating, Focusing, Productive, Refining
- **Positive**, Energetic, Energizing, Enthusiastic, Light-hearted, Optimistic
- **Relational**, Caring, Close, Genuine, Risk taking, Sharing
- **Responsible**, Conscientious, Dependable, Ethical, Hardworking, Available
- **Restorative**, Analytical, Fixing, Identifying, Rekindling, Resuscitating
- **Self-Assured**, Certain, Confident, Independent, Risk taking, Self-confident
- **Significance oriented**, Achieving, Credible, Focused, Goal oriented, Independent
- **Strategic**, Intuitive, Observant, Predicting, Problem solving, Reflective
- **Woo-Charismatic**, Conversational, Friendly, Initiating, Networking, Sociable

Progress Dashboard

Prepared by: _____

Prepared on: _____

I. HOW ARE YOU?

Indicate your opinion on a scale where 5 = Excellent, 4 = Very Good, 3 = Good, 2 = Fair, 1 = Bad

Health Check	Spiritual	Emotional	Physical	Financial	Focused Attributes
Personal/ Family					
Those You Lead					

2. HOW ARE YOU DOING?

A. Key Objectives and Milestones	Planned Completion Date	%Complete This Period	% Complete Last Period
1.			
2.			
3.			
4.			
5.			
B. Key Indicators Where Possible Relate to Objectives, Goals or Budget.	Target or Budget	To date Value / %	Balance Remaining
1.			
2.			
3.			
4.			
5.			
C. Notable Achievements and Communication This Period			
1.			
2.			
3.			
4.			
5.			
D. Issues and Concerns This Period or Brought Forward from Previous Reviews			
1.			
2.			
3.			
4.			
5.			
E. Recommendations or Requested Action This Period or Brought Forward from Previous Reviews			
1.			
2.			
3.			
4.			
5.			
Received by _____		Date _____	

NOTES