

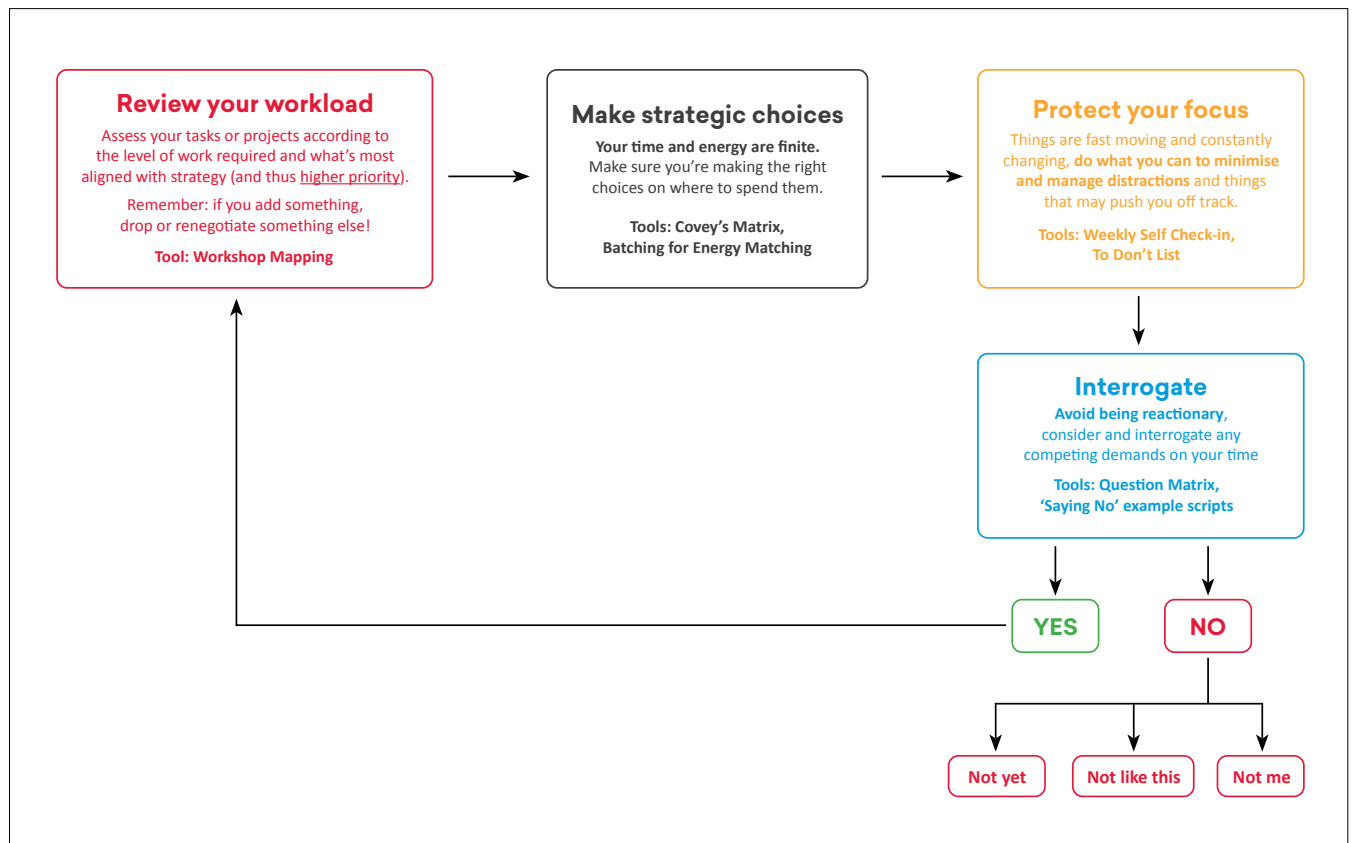
# The **EDGE**

## Priority setting & Focus Toolkit

April 2022

# Focus on priorities

When you're feeling overloaded or overwhelmed, use this flowchart and the tools we've provided to help get you organised and back on track.





# **Reviewing your workload**



# Workload Mapping

It can be overwhelming *thinking* about all the things you have to do. But beyond a daily to-do list, what's your system for organising your work/projects? One way to really determine your bandwidth against your capabilities is by making it visual!

1. Start by mapping out 1-2 weeks' work (or more) by **priority levels**.
2. Next, identify the **level of work** required for each task or activity.
3. Finally, **analyse** your work map. Are all your tasks in the right week or level of priority? Can some things be delegated or can you get help on them? On what level is the majority of your time being spent?

Week of

<b>High priority</b>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>
<b>Medium priority</b>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>
<b>Low priority</b>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>	<div><input type="radio"/> L1 <input type="radio"/> L2 <input type="radio"/> L3</div>



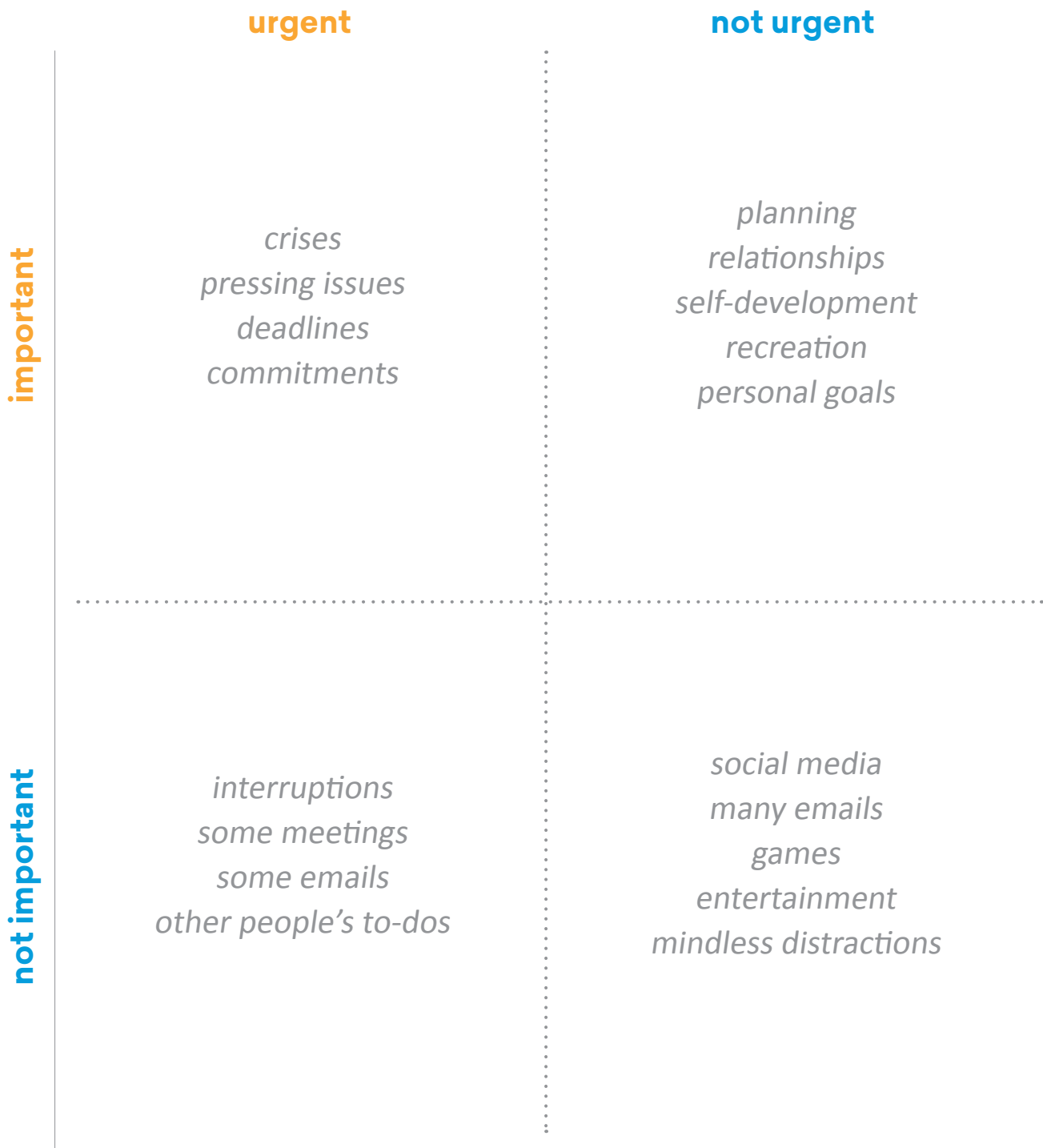
# **Making strategic choices**



# Covey's Matrix

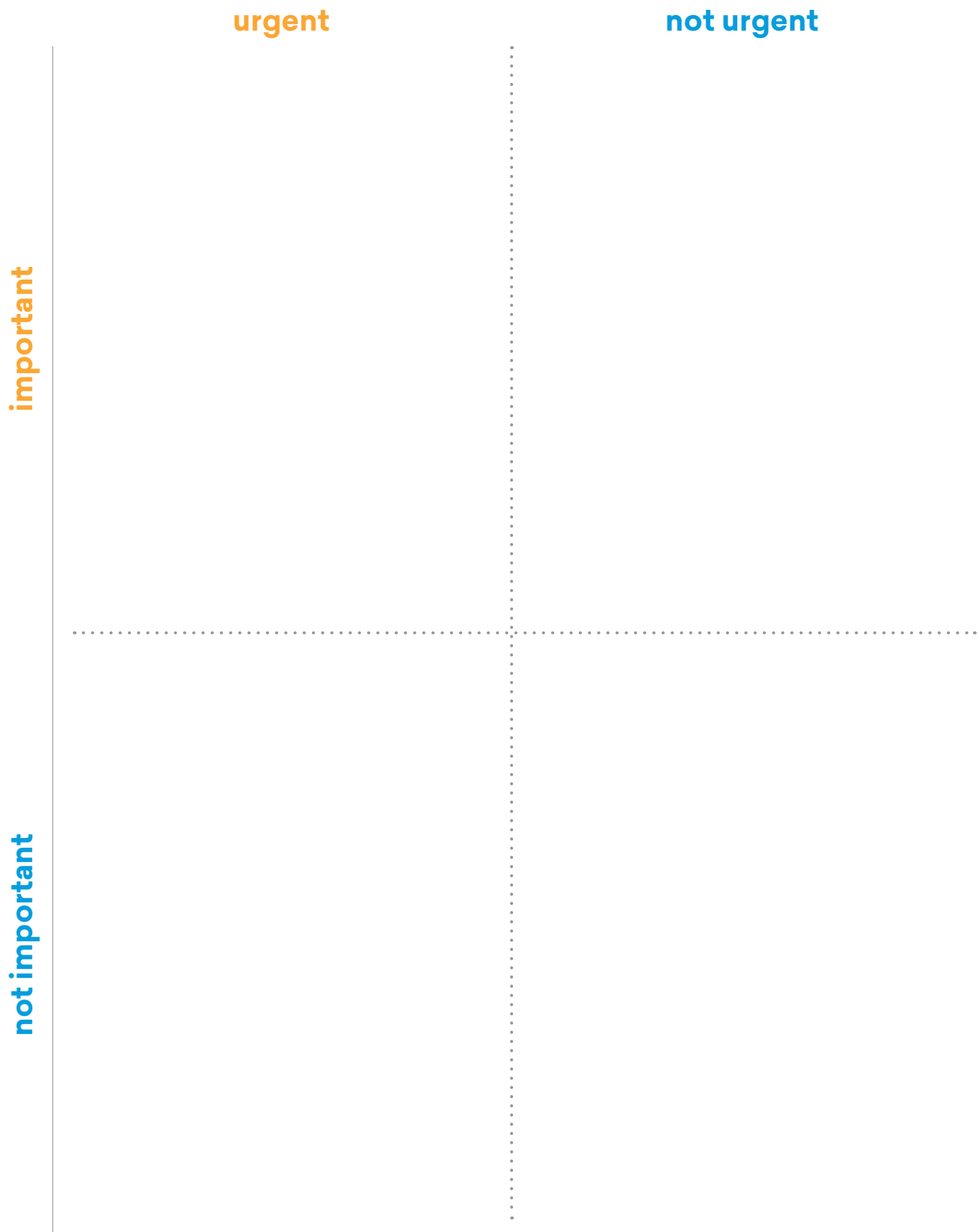
Covey's Matrix is a tool designed to help you prioritise all the things on your to do list. By doing this you create a manageable list of tasks instead of feeling overwhelmed by one long un-ending one!

See the example below for how you can categorise different types of tasks.



# Covey's Matrix

Use the template below to help prioritise your own task list



# Batching for Energy Matching

Use this tool to ‘batch’ your tasks and to do list(s). Start by writing down what you need to do today, this week, or even this month. Once you’ve got your list, gather all similar tasks (client calls, email-related things, personal tasks or errands, etc) then plan for or set a time/day to do them all at once.

By completing your tasks in batches, you maximise your focus and greatly increase your productivity.

## To Do

## To Do - Batches



# Protecting your focus



# Weekly Self Check-in

1

## Monday Vision

List 3 objectives for the week:

- Complete presentation
- Start planning Project X
- Reach out to XXXX

Focus on outcomes or achievements rather than activities.

2

## Daily Outcomes

Identify 3 results at the start of each day that you want under your belt.

3

## Reflect on Progress

Reflect on the week's progress by asking yourself on Fridays:

- What 3 things are going well?
- What 3 things can be improved?

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## Before you start your day - remember the 'to-don't' list!

- **Don't get overwhelmed by a long to do list.**  
Decide on the 1-3 most important things to achieve TODAY and make them your focus, say NO to other tasks.
- **Don't start your day with email**, start your day OFFLINE.
- **Don't always have your email on** – turn it off, check 2-3 times a day.
- **Don't allow your time to get booked up by other people** – book in meetings with yourself, carve out time for deep thinking.
- **Don't be afraid to demand meeting discipline**  
this includes requesting meeting objectives and the reason why your presence is required
- **Don't keep your phone alerts on** (this includes vibration). Switch your phone to airplane mode to silence social media and other distractions.
- **Don't answer calls unless they are scheduled**
- **Don't stay in meetings that are going around in circles** say what you see 'we're going around in circles' and encourage a decision or call an end.

What other to-don'ts can you add to your list?



# Interrogating the demands



# Question Matrix

## Context

- What's the big picture?
- How do you know this to be true?
- What problem does this solve?
- Is it the right problem?
- Is it the right solution?
- How does this fit in with the strategy?

## Constraints

- Budget/time
- Who/what does this effect?
- Who needs to know?
- When do you need outputs?
- What hard deadlines exist?

## Politics

- What else do I need to know?
- What are the different agendas?
- Who might be against this? Why?
- Who is in favor of it?
- What resistance might we meet?
- What if what we think is wrong?

## Vision of success

- What does success look like?
- How would you like it to be?
- What do you want people to say/think as a result of this?
- Who is for it?
- How will it make a difference to you/the brand?

# Saying no without saying 'no'

**If you're afraid saying no might damage your relationship...**

You can **express enthusiasm for the opportunity**, but explain that the timing isn't right for everyone to get the best outcome if you take it on.

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**If it's your boss leaning on you to take on extra commitments...**

**Create your work map or draft a list of your projects and ask them to help you prioritise and reconfigure your time.**

Doing this also gives visibility to your workload and may lead to a different or better outcome.

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**If the request is coming from someone more senior...**

If this is not your line manager, explain that you'll need to double **check the new priority list with your manager before agreeing**. Let them know you will get back to them in 48hrs (so they aren't left 'hanging').

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**If the person compliments your ability to do the job well...**

**Don't be tricked into saying yes just because of that.** Thank them for the compliment and say you'd love to help them, but the parameters will need to change for you to support them (change in timing/depth/quality of output).

# Setting work limits & communicating boundaries

## Useful phrases for being clear about your needs:

- “Can you...”
- “I want you to...”
- “I would like you to...”
- “I need you to...”
- “I expect you to...”
- “If you don’t, I will...”

By using these phrases you will come across as confident, clear & concise. However, going into an authoritative stance all the time can be seen as aggressive or inflexible so be sure to cushion it by stating what YOU will do and then what you need the other person to do. This will demonstrate that you are all a team.

## Phrases to use when you feel you’re being unfairly pressured:

- “I understand that this is really important to you and we will/are doing... But please also remember/keep in mind/don’t forget...”
- “I recognise that...”
- “As you can imagine, everyone’s project is a priority...”
- “It’s worth remembering that...”

## Top tips for setting limits:

- **Use the Workload Mapping tool** to help visualise your capacity and workload for others.
- **Start by expressing enthusiasm and gratitude for the opportunity.** This demonstrates that you understand this is important to them.
- **Help the person understand why you’re setting limits.** Mapping your workload, for example, will visualise your projects/time and serve as a starting point for conversation. This takes the focus off the “no” and/or the person not getting what they want, and instead may help work towards a solution.
- **If you can, offer an alternative approach or solution.** This will demonstrate empathy and a desire to help them.
- **Suggest alternative, useful resources** like a different team who might be able to provide the desired outcome faster or cheaper.

## Some example scripts:

### Delaying

- “It’s a really interesting topic and I’d love to be involved. But right now, I can’t give it the time it deserves. If you haven’t found someone to take it on by X date, do come back to me.”
- “I know this is very important for you, but right now the prioritise I’ve been advised to focus on are A, B and C. As such, I’ll not be able to help until a later date.”

### Diverting to someone else

- “You know, now that you’ve explained it to me, I think we can find you a better solution. Let me tell you about X.”
- “Thanks for explaining this so thoroughly, I know you would like the XX approach, but this will take time and resource. I also think you could benefit from having the results sooner, can I recommend X approach... for this you can go straight to the agency.”
- “Thanks for asking me to be involved, but you know who’s the expert on this topic? It’s X. I strongly recommend you approach them as they will be able to execute this much more quickly than I could.”

### Meeting in the middle

“I understand the desire for a rewind and thank you for thinking of me. But if I do this work, then I will be the most informed person on the project. As project manager, I really think it’s important for the most informed person to be you.

So, let’s do this – I’m going to explain how I approach rewinds, then when you get stuck in, let’s put 2 dates in the diary to review what you’ve done – together we can get it to a good place and you’ll be the expert on the topic.”



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