

Work/Life Balance Worksheet

developing the self-awareness for an intentionally-designed work/life balance

A work/life balance of our intentional design and choosing

Our work should - at least, for the most part - interest and energise us. But it should also leave us time enough to enjoy and pursue the other aspects of life: friends, family, other interests, other values. Because we work (and live) best when our lives are in balance.

Balance means different things to different people - and at different points in their lives and careers. So this worksheet is not about dictating a prescribed work/life balance, but about developing the self-awareness to ensure that whatever your goal for work/life balance, it's one of your intentional design and choosing.

So, ask yourself now:

Strongly Disagree Disagree Neutral Agree Strongly Agree

Q. Is my work/life balance of my intentional design?

Q. Is my work/life balance exactly as I want it?

How do you feel about your answers? And if you were to revisit these questions in the near-future, how would you want them to be different? Let's get to thinking.

Wheel of balance

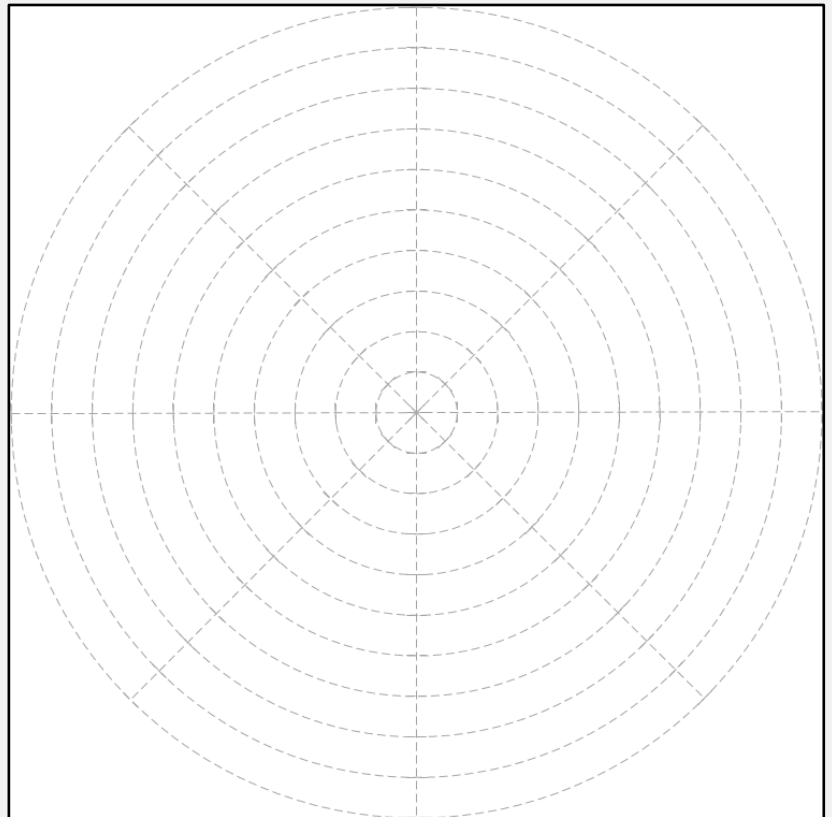
Where are you in and out of balance?

Using this template, divide the circle into equal segments: one for each major area you identify as comprising life.

One segment will be "Work". The others major areas will be things like "Friends and Family", "Health and Fitness", "Personal Development" and so on. Whatever makes-up your life.

For each area, give yourself a satisfaction or fulfillment rating out of 10. Using that score, shade in a percentage of that segment to reflect your score out of 10. (The template has markers to make this simple.)

When complete, take a step back: What do you notice? Where are you in balance? Where are you out of balance? How do you feel about your scores? Any surprises in there?



Use this exercise to bring into awareness where your time and energy is going. And ask yourself: is this by my intentional design? Or has it "just become" that way? How do you feel about that?

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Intentionally-designed work/life balance

We continually make judgements - at both micro and macro levels - about our work/life balance: boundaries, compromises, priorities, choices. These decisions have consequences - positive and negative - for our well-being AND our ongoing performance.

Most-often, we do all this on autopilot, outside of our conscious awareness. If you disagree, think to yourself, right now, of all the things you're calling a "priority" but are not actually working on. Or conversely: all the things you're doing all the time that you're not considering a "priority".

That's fine. One work/life balance profile is no better or worse than another - just so long as it's your intentionally designed and chosen work/life balance.

Intentionally design your ideal work/life balance now, using the following exercise and spaces provided below.

1. Current. Rate your current work/life balance on a scale of 1 (not as I want it) - 10 (exactly as I want it).

2. Target. Now write down your "Perfect 10" for work/life balance.

- What are the key characteristics of your daily/weekly/monthly/quarterly/annual routine?
- What will you get time for that you don't currently have?
- What's most different about your "Perfect 10" from the current reality?
- What's the most exciting thing you'll start doing with your extra time?
- How will it feel to have the work/life balance exactly according to your design?

3. Changes. Now write down what needs to change.

- What are your priorities?
- What's holding you back?

4. Measure. And write down the One Big Thing that tells you you've achieved your work/life balance.

5. Action. Now write down ONE thing that you can commit to, right now, that will move you forward.

Current Work/Life Balance Satisfaction Rating (1 - 10)

**My "Perfect 10" Vision
for Work/Life Balance**

My Top Priorities for Change

- | | |
|----------|----------|
| 1. _____ | 4. _____ |
| 2. _____ | 5. _____ |
| 3. _____ | 6. _____ |

How I'll Know Success

My Very Next Action

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Acknowledge what's holding you back

Balance and boundaries are ever-present in our day-to-day working lives. To make changes will require changes in likely-ingrained habits and routines. If you're serious about making such a change, you need to look not just at the change you're moving towards, but also the pull of making no change.

So: what are you getting from your current strategies*, habits and routines? How are they serving you?

* A "strategy" is the structured sequence of our actions. We have strategies for everything we do.

<p>1. Look at your daily/weekly routine. Which habits and strategies are contributing to your current imbalance?</p> <ul style="list-style-type: none">▪ Excessive hours at work?▪ Prioritising work over non-work?▪ Turning non-work projects into work projects?▪ Avoiding delegation to maintain control on your work?	
<p>2. What positives are you getting from your (currently imbalanced) setup?</p> <ul style="list-style-type: none">▪ Recognition? Reputation? Reward? Progress? Safety? Security? Control? What else?	
<p>3. What challenges could you make of your positives?</p> <ul style="list-style-type: none">▪ Are the positives actually positive?▪ Are you getting these positives specifically from overwork?▪ Can you get these positives without the overwork?▪ How else and where else could you get all these positives?▪ Is the overwork worth the sacrifice for these positives?▪ If you removed the positives, what's the worst that might happen?▪ What's the best that might happen?	
<p>4. Now make yourself a work/life balance goal.</p> <ul style="list-style-type: none">▪ Which of the positives are non-negotiable? Which can you drop?▪ How could you get the positives and maintain ideal balance?▪ Capture the essence of your balance goal in a single sentence.▪ Define the measure: What One Big Thing indicates success?	

Write-out your work/life balance goal in the following structure:

"It's [TARGET DATE] and [GOAL ACHIEVED]. And I know this to be true because [MEASURE]".

For example: "It's 21 January 2016 and I am happier and more fulfilled with my intentionally-designed work/life balance. And I know this to be true because my wife and children have commented on how much more time I spend with them. And how much more relaxed I seem."

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Quick Tips

To help you achieve a better and more intentionally-designed work/life balance, try these:

- 1. Watch-out for the living of a deferred life.** That continual language of "it'll be more/less/different when ..."
Ask yourself: what are you foregoing right now, in this present? Do what you always wanted to do, right now.
- 2. Create a work/life balance goal.** Not vague and informal, but thought-through, written-out and well-formed.
Then give your balance the time, focus and attention it deserves.
- 3. Include your nearest/dearest on the plan.** Tell them about the work/life balance challenges you've noticed and your new work/life balance goal. Sharing your goal will help keep you accountable.
- 4. Take a look at your habits.** Which of your routines are serving you and your balance - and which aren't? now consider: what's the trigger that's kicking-off the routine? Learn to spot these - and choose a different response.
- 5. Examine your deeper motivations.** What is the deeper reason behind devoting extra time, attention and effort to work or a particular project? And consider: what is this saying about the other areas of my life?
- 6. Define a new set of rules.** Set some "unbreakable" rules to help maintain balance. For example: make your daily walk a non-negotiable. When faced with a rule-breaking choice, simply say: "sorry, that's the rules".
- 7. Work diligently on the non-work.** Use whatever it is you're getting from work as clues to what you're not getting outside work. Then kick-off a non-work "project" that expresses those values.
- 8. Point self-discipline at what you do want to do.** "Self-discipline" is often thought of as that which gets us through the less desirable tasks. Re-think self-discipline to be about "forcing" you to focus on ... you.
- 9. Carve-out some space.** A space for work; a space for personal; a space for a special project. Respect these spaces by only ever engaging in the activity for which you've assigned that space. If you're moving on to another activity, move to its space.
- 10. Always be looking to change-up.** Imbalances in life and work most often happen when we've dropped into autopilot. So set a reminder periodically in your calendar to take a high-level view. What could you change?
- 11. Recognise the wider consequences.** Exceeding boundaries has benefits (that's why we do what we do) but also negative consequences. Really challenge yourself to notice the wider consequences for your performance, motivation, commitment, energy levels and so on.
- 12. Find ways to nurture yourself at work.** Keep a regular work schedule and ensure your routine day includes breaks, lunch, time away from your desk, time outside, time making connections with others.
- 13. Remind yourself: you are not your work.** Our commitment and dedication can lead us to define our entire identity by our work. But there are many other ingredients that make-up our whole self. Have the source of your identity be many things.