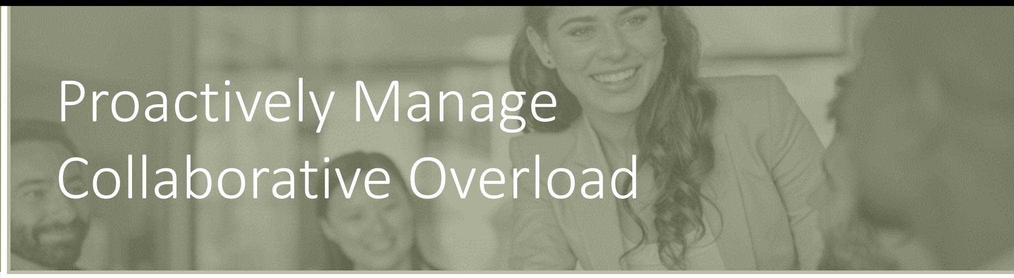
Effectively Managing Transitions | REFINE



Proactively Manage Collaborative Overload

PRINCIPLE

Take steps now to reduce collaborative overload later. As you necessarily invest significant time engaging with others early on, prepare to step back and shift to collaboratively efficient interactions 6-9 months in. More effective people gain back 18-24% of their time by making 3-4 small changes.

"If I didn't start operating a little differently … there's no way I could have managed through that surge in work … the key is to be proactive and not fall into the trap of thinking things will somehow get better in a month or two."

In transitions, a surge of work to build a diverse network is necessary to grasp a new role and context. However, it is vital to shift patterns of interaction after 6-9 months to avoid derailing due to collaborative overload. When people don't do this well, they get over-utilized and create reliance on themselves that cannot be sustained. They become less effective, and, over time, experience burnout.

More effective people reduce collaborative overload after initial surges of work on entry into a role by *imposing structure*, *challenging beliefs* and *altering behaviors*. In transitions, it is helpful to plant seeds along the way that will help you make that shift and avoid collaborative overload later. Specifically:

- **Avoid being the "indispensable expert" or the "white knight."** Consider if your sense of identity is tied to being the expert, you worry too much about other people making mistakes, or you like to "save the day." Fight the tendency to do it all. Once you have this reputation, it is difficult to change expectations.
- **Don't own all the relationships.** You don't want to be the exclusive point of contact for your group or your expertise. Help people know who else to reach out to and who else to rely on. Use weekly team meetings to connect people directly and advise your group to always run a problem by a peer before coming to you for help. Never go anywhere alone—bring others to your meetings or rotate team members to join in on client calls so they can seamlessly help.
- **Be clear regarding the unique value you add.** Identify the activities and relationships through which you provide unique, high-impact value and make these a priority. Delegate, defer or politely decline requests that could be completed by less-burdened colleagues or someone with a different skillset.
- **Have critical conversations with co-workers to set or adjust expectations.** Opportunities often exist to redistribute work and redefine role expectations. Rethink habits around decision making and approvals, who goes to meetings and for how long and how people get help when they need it.
- **Set rules to manage meetings, conference calls, online communication and off-hours availability.** Avoid cycles of endless meetings by defaulting to shorter meeting times, asking if you are really needed and leaving an in-progress meeting when your time is better spent elsewhere. Preserve time on your calendar for thinking and working through priorities. Set rules around off-hours availability and online response times that work for you.

Shamira pushes back on over-scheduling and large meetings, focusing her time where she has unique value to add. "Is someone else better suited to do it? Is there someone else on my team who can learn from the experience? … I work with people who think I need to be in every meeting and I tell them, *No, that's not going to happen*." To create some control over his time, Bart maps out his calendar every weekend to block time for priorities and focused work. "I get more emails, more collaboration, but I don't view it as a negative. I'm very responsive when I need to be. The rest, I can ignore. My team will let me know if it's important."

MANAGING TRANSITIONS

Entry into a new organization, changing roles, new responsibilities and promotion all place demands on you that can most efficiently be met by leveraging networks. Make transitions successful by investing in networks in three ways:

Initiate
Jumpstart productivity and inclusion by cultivating essential connections broadly and before you need help from others.

Engage
Energize people in your network and pull colleagues to you and your ideas when engaging with new groups.

Refine
Re-calibrate networks and collaborative practices for long-term effectiveness and well-being.

TAKE STEPS NOW TO AVOID COLLABORATIVE OVERLOAD LATER

People can be overwhelmed when a large ***volume*** and ***diversity*** of collaborative demands consume their time. They end up working long hours at a frenetic pace. They use their own (and others') time inefficiently, become less innovative and have a tendency to burn out.

More effective people make important choices that streamline their interactions, focus their collaborative efforts and buy back 18-24% of their time. Instead of looking for a single, high-impact change to make, they make several small changes tied to structure, beliefs and behaviors. Scan the QR code at right for more about collaborative overload.

To push back against collaborative overload, **review the 3 categories below. Identify 1 area or item in each that could most help you improve collaborative efficiency**. Put reminders in your calendar right away.

Impose Structure

Focus on priorities. Adapt roles, routines and interactions for efficiency.

- Gain clarity on personal "North Star" objectives: strengths or expertise to develop and employ, values to live by and identity to express.
- Be proactive to create the right network for your personal and professional success.
- Block time on your calendar to ensure your personal and professional goals are attended to. Include time for network development, creative or strategic work and activities that re-energize you.
- Review calendar and email requests. Delegate or decline tasks so you are involved only where you add unique value.

Challenge Beliefs

Understand how identity and ways you choose to engage drive excessive collaborative demands.

- Determine if you jump in unnecessarily because of needs or fears. Examples include: *need to be right, need for accomplishment, need to help, fear of losing control, fear of missing out, fear of being labeled negatively and discomfort with ambiguity.*
- Take steps to keep your tendencies in check. For example: *Give direction or partial answers to create room for others to contribute, clarify how you can best contribute to a project or group, say no more often, identify low-risk tasks to delegate or projects to stop micro-managing.*

Alter Behaviors

Employ appropriate communication channels and promote efficient network norms.

- Be diligent about meeting practices: stay focused on desired outcomes, include only those who need to be involved, and use efficient processes re: technology, time, discussion and follow-up.
- Write streamlined emails and set norms for efficient email use within your team/unit.
- Put thought into how you use IM, text, phone and collaborative tools. Match the medium to the need.
- Teach others how to consume your time; in turn, consume others' time efficiently, too. Always clarify what you want to accomplish together.

NETWORK TIPS

- **There is no single solution to streamlining the collaborative intensity of work**. The key is to make 3-4 small changes—and be consistent. Surprisingly, this can help you gain back 18-24% of your time.
- **Be proactive.** Don't make the mistake of assuming things will get better in 6-8 weeks or that someone else will make a change that eases your overload. If you do not play offense, you will always be reactive.
- **Collaborative overload comes in two ways: the surge and the slow burn.** The surge is common in a role transition, or when taking on an extra assignment. The slow burn is more insidious because you don't see it coming. It is the product of incremental increases in collaborative demands as your network and scope of responsibilities expand. Be aware of both and adapt as needed at different times in your career.