



# UNIT13

# Stress Management

## Learning Outcomes

**By the end of this unit the learner will be able to:**

- ✓ Understand that stress is an unavoidable part of everybody's life
- ✓ Recognize the symptoms that tell you when you have chronic stress overload

## Unit 13

### Understanding Stress

#### Where Are You Now?

When we present a stress management course, we often look for the greatest areas of our life that produce stress.

- Ñ According to Peter Hanson, MD, a best-selling author of several books about stress, work and the workplace causes most of our stress.
- Ñ According to the Holmes-Rahe stress scale, which has been popularly used in stress management workshops since the late 1960's, the greatest single stressors come from our personal lives.

In reality, it depends on what's happening in different areas of our life, and how we respond to things that add to our stress levels, no matter where they are coming from.

We know intuitively that the economy, threats of layoff, doing more with fewer resources will add stress to our work. However, even in an ideal workplace there can be people we don't get along with, orders that do not arrive on time, and phones that don't get answered. On the home front, finding a new place to live, weddings, family gatherings, finances, and inflation can add stress to our lives.

The word "stressor" is something we hear frequently. A stressor is something that puts real or perceived demands on your physical, emotional, or spiritual self. Stressors can be positive or negative.

#### Defining and Identifying Stress

Stress is our mental, physical, and behavioral response to something that could threaten our safety or well-being. Too much stress can result in serious physical, psychological, interpersonal, or performance problems. Too little stress, however, can also lead us to be unconcerned with getting on with things, including getting out of bed in the morning.

#### What Does It Mean?

The pre-assignment is a way for you to review where your life is right now and bring the topic of stress to a prominent place where it can be discussed.

We know from research dating back to the 1960's (Holmes & Rahe, 1967, Journal of Psychosomatic Research, Vol. 11) that there is a health toll that chronic stress brings with it. Their research demonstrated that the more stressful events you encountered in a 24 month period, the more likely you were to become ill.

While we have tempered that research with the knowledge that positive stress can be very good, and we know that not all people respond to stress in the same way, we do know that there is a direct correlation between perceptions of stress and the impact on our health. Generally, the more significant life events you encounter, the more potential there is for you to become ill.

## Ways to Look at Your Stress

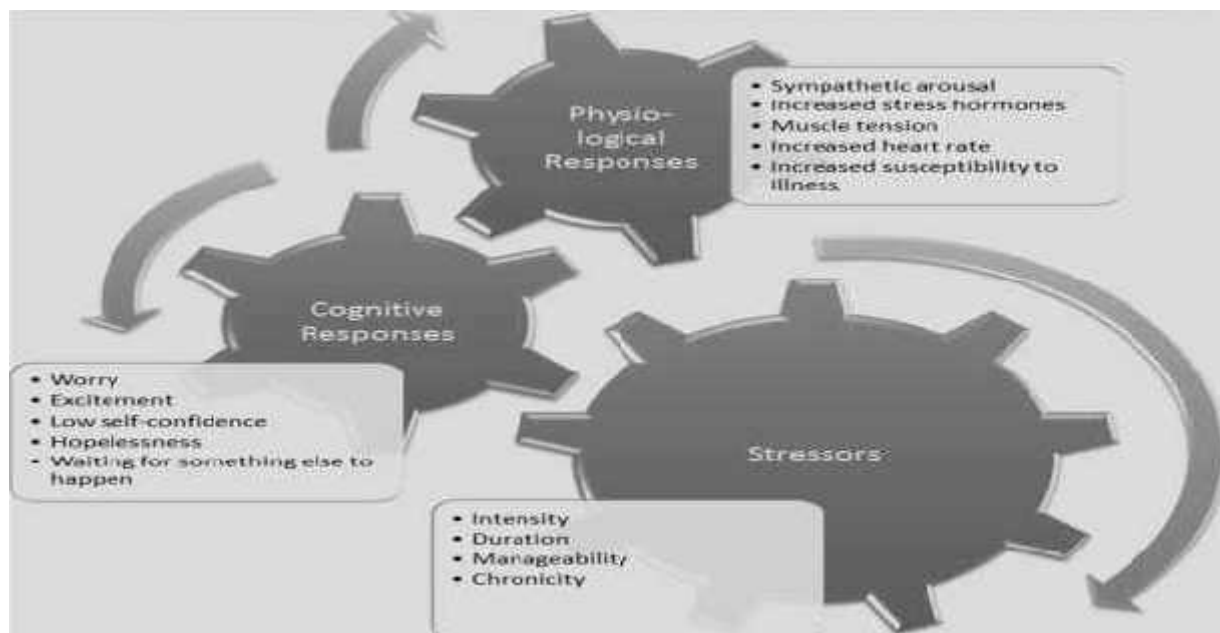
Stressors lead to stimuli which evoke some kind of a response. Whether your response is physical or psychological, stressors require that we adapt and respond in some way. The greater the gap between the demands and the resources, the more stressful a situation becomes for us.

Some stressors are small, like finding there is no toilet paper when we go into the bathroom, or calling someone and their voicemail is full. Farther up on the scale, there are major negative events, like being caught in a storm and unable to get home through downed power lines, or being the victim of a crime. Looming larger are catastrophic events, often unexpected, such as natural disasters, acts of wars, or riots.

Events over which we have very little control, which occur suddenly and unpredictably, and which have an impact that lasts for a long period of time, generally have the biggest impact on physical and emotional health. In addition, even small events that are chronically repeated over a long period of time (like your colleague being late for work every day for a prolonged period) can be equally taxing.

## Understanding Stress

These factors:



Can all contribute to these coping behaviors:

- Ñ Avoiding priority tasks
- Ñ Rigidity or disorganization
- Ñ Self-destructive behaviors (such as substance abuse or alcoholism)

(Sources: “Stress, Appraisal, and Coping” and “Psychology Frontiers and Applications”)

### **Stress and Your Health**

Stress is a significant factor in health problems in the world today. Repeated stress, whether positive or negative, leads to a release of hormones in the body. It is the constant battering of these stress-related hormones that can have a negative effect on our health over time.

Dr. Peter Hanson, author of *The Joy of Stress* and many other books on managing stress, says that stress is neutral until it lands on us. What we choose to do about stress determines how it will affect us, and so while it does not directly “cause” these problems, it certainly contributes to them.

- Ñ Heart attacks or strokes
- Ñ Substance abuse (illegal drugs, improper use of prescription drugs, alcohol)
- Ñ Abdominal problems, such as irritable bowelsyndrome
- Ñ Physical illness
- Ñ Hypertension
- Ñ Migraines
- Ñ High cholesterol
- Ñ Insomnia
- Ñ Depression and anxiety

### **What is Stress About?**

#### **Stress can be about changing lifestyles.**

Many people feel that life has become more stressful, although those who have successfully leveraged technology and established a satisfying balance of health, wellness, and work may not feel that way! Our access to food from different geographic areas, mass transportation, communication, and other privileges are enjoyed by many people.

#### **Stress can be about power.**

Many of us feel more stressed when we feel powerless to change the way things are. Stress is an equal opportunity opponent: it affects people of every age and every culture, regardless of whether you are male or female.

**Stress can be about self-esteem.**

When our self-esteem is high, we feel more powerful and therefore less reactive to negative stressors. When our self-esteem is low, we feel like we have no power to make any changes and that can cause us more stress.

**Stress is about change in our environment.**

Change can be exciting when it brings something we look forward to, even if we have to do extra work to get the changes into place. Unexpected change, though, can bring negative stress with it, even though we can see that the change itself has many positive aspects. If we don't like the situation we find ourselves in, if we are familiar with being in that situation, or if we feel that at least we know what will happen when we are in the situation, we find it less stressful than when we are stepping into the unknown.

People who make comments about not liking change or not being adaptable could benefit from some intervention and stress-reduction techniques, because the world continues to change rapidly, and we are forced to change along with it, whether we want to or not.

**Flexibility**

Being flexible can reduce stress! Try sitting at a different spot at the table occasionally, taking a different route to work, changing your hairstyle, or going somewhere different to experience different foods.

**Eustress**

Don't forget that stress isn't all bad. In 1974, Richard Lazarus defined the term "eustress" to describe healthy or positive stress. The prefix *-eu* comes from the Greek word that means "well" or "good," making eustress (good stress) distinct from the negative associations of *distress*.

Positive stress motivates, increases energy levels, and can drive people forward to embrace the work before them.

What about having no stress at all? An absence of stress can actually lead to boredom or frustration. When people who enjoy a variety of activities as a part of their day suddenly find themselves all caught up and with some free time on their hands, they can actually become bored and experience feelings of fatigue. A balance of positive stress is ideal, although the human component to this is that each person responds to stress individually. That means what is good stress for one person can be negative for another.

## Building a Solid Foundation

### Taking Care of Your Body and Your Mind

In considering the foundation that you offer to support yourself, we speak in terms of four pillars that support stress management:

- Ñ Good nutrition
- Ñ Exercise
- Ñ Strong, supportive relationships
- Ñ Relaxation techniques

Many of us are already familiar with the ideas behind these pillars; however, we don't always act as though we do. This is a good opportunity to do some thinking out loud.

### Test Your Knowledge

Prepare a list of what you think each of us should be doing to manage our stress related to each pillar. Try to have five items for each topic.

#### Good Nutrition

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#### Exercise

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#### Strong, Supportive Relationships

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**Relaxation Techniques**

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**The "Less Stress" Lessons**

Relaxation techniques are crucial for managing stress. Let's talk about some techniques that you can use anywhere, any time.

**Body Scan**

In order to relax, we must first learn where, when, and how we store tension in our body. Does everybody know where they store their tension? It may be in the back, their neck, their stomach, or some other part of their body. How will they know? This part of their body reacts: they get a stiff neck, they get an upset stomach, or they have back pain. When you figure this out, you can also design remedies such as yoga, stretching, massage, warm baths, healthy eating, to help reduce their impact.

**Breathing Through Your Diaphragm**

Thich Nhat Hanh, a Vietnamese Zen Buddhist monk, once said, "Our breath is the bridge from our body to our mind."

Loosen your clothes, close your eyes, mentally relax your body, and take ten or more deep breaths. Your goal is to breathe into the bottom of your lungs (where the oxygen is readily absorbed), not the usual upper lung breathing we do. Put your hand on your stomach and feel it move as you breathe in in order to make sure you are getting the air in good and deep. We call this diaphragmatic breathing, because

you are using your diaphragm muscle to breath. When people are experiencing anxiety they are most often breathing into the upper area of their lungs rather than the bottom.

Each time you exhale, count silently: “one,” after the first breath, “two,” after the second breath, etc., up to at least ten. If you lose count, or find yourself working on thoughts as they pass through your mind, start your count over again. When you are finished, you should feel more calm and relaxed. (Your blood pressure will go down temporarily too.) If you’re in a meeting, on the phone, or dealing with a customer, count in your head.

### **Stretching**

Stretching has multiple benefits. It increases blood and oxygen flow in your body, as you focus on areas of your body and encourage yourself to be mindful of your movements, and relax your mind.

### **Visualization**

Use positive imagery to boost your mood and enhance your visible performance. In your mind, picture a place that you love. Feel the sunshine on your face, or the breeze on your skin. See the things that you love to see in great detail. If you are getting ready for a presentation or an interview, visualize yourself performing it perfectly, so that when you get to the event your mind thinks you’ve done it before, so this will be even easier than the last time you did it (a technique used by athletes and peak-performance coaches).

### **Sensory Awareness**

Shakespeare once said, “There's not a minute of our lives should stretch without some pleasure.” Try to slow down and be more aware of your surroundings.

## **Strategies to Manage Stress**

### **Mental Strategies**

#### **Changing Ourselves**

Now that we know what stress is, let’s talk about some general strategies that we can use to manage it. This afternoon, we’ll look at some more specific factors.

These three factors impact our ability to manage stress:

- Ñ Personality
- Ñ Nature of organization
- Ñ Quality of support

Which of these three can we influence?

## Personality

It's true that we can't change our personality, although we certainly have influence over ourselves and we can make some small changes by making different choices. For example, if we are very impatient with other people, we can learn to be a little more patient with them. Impatient people can alienate others, and they run the risk of having very small social circles. Learning some tactics to curb our impatience could improve our lives tremendously.

## Nature of Organization

We can't change the organization we work for, either, unless we own it, but we can influence the mood and atmosphere there. If the stress is unbearable and we cannot exert the influence we'd like, we can also change jobs. That is a drastic measure to be sure. However, assess what makes your workplace such a toxic environment. Is it the work or is it the people? Can the stress be partly attributed to your reaction to what is happening? If your workplace is truly too demanding, then save yourself and find another place to work.

However, if you are stressed out because nobody has ever told you what is expected of you, then talk to your supervisor about what they expect of you. If you feel like you need more training to do your job, ask for training. Perhaps you can find a mentor, or a buddy, or perhaps your company will send you to external training. You won't know if you do not ask.

## Quality of Support

One thing we can always change is the nature of the supportive relationships we have. This can be done in very strategic ways, even though they may require that you function outside your comfort zone.

- Ñ We can develop relationships at work, socially, and at home.
- Ñ We can reach out more often to both friends and family.
- Ñ We can strengthen relationships. To do this, we can ask for and offer help.
- Ñ Keep in mind that relationships are reciprocal so be a better friend or supporter yourself, and develop a wider circle of support.

## The Triple A Approach

Choosing an approach that works for you means that you are accepting the role you play in managing your own stress. When we have situations that cause our stress levels to rise, there is a choice-based approach that we can apply to almost everything. We can alter or change the situation, figure out how to avoid the situation, or accept the situation and alter our response to it.

### Alter

Sometimes this is the most promising strategy. Let's say you are always stressed when you are going to be late for a meeting. Change the situation by setting an alarm so you will leave five or ten minutes earlier than you usually do. Write the appointment down with a 15-minute cushion. For example, if you have a meeting that starts at 2:30 p.m., and it is in the building next door which is a 10-minute walk,

make sure that you write the walking time into your appointment calendar. And make sure that you don't accept a meeting invitation that will take you right up to 2:30 p.m.

Here's another example: Every time your mother-in-law comes for a visit your hackles rise and you are in a bad mood the whole time she is there. How might you alter that situation? You could speak with your partner and make reservations for her to stay at a nearby hotel, buy a bouquet of flowers for her room so you start off on the right foot, or try to get to know her better. If this is a longstanding tough relationship and you've never talked to her about it, perhaps now is the time to do so.

### Avoid

On the other hand, that mouthy neighbor may be somebody you can avoid altogether. Don't get drawn into a conversation with them, and if they try to talk with you, let them know you have somewhere else to be. If cheese gives you a migraine, avoid it. If your car needs maintenance before it falls apart, avoid calamity by getting it looked after. Forcing ourselves into situations that contribute to our stress, when we really don't have to be in those situations at all, is masochistic. (By the way, don't decide to avoid your mother-in-law altogether. That just transfers the stress you feel onto your spouse and that isn't fair.)

### Accept

There are some things in life, like taxes, that are unavoidable so we may as well accept these situations with good grace. Being grateful that you make enough money to pay taxes puts the annoyance of taxes into another light. There are plenty of things that annoy people that others simply accept. Let's say going to the dentist makes you stressed. Accept that and deal with it accordingly. Play music before you go or do some meditation. Let your dentist know how you are feeling, and let them reassure you that they treat all their patients as if they don't want to be there and have set up their practice to make you as comfortable as possible. If that's still not helping, remind yourself that dental health is linked to heart health, and accept the benefits of what you are doing.

### Stress at Work

#### The Stress Tax

Do you work in a stressful environment? Is it what you would consider a "reasonable" amount of stress, or does it seem that there is more stress in your organization than others?

Costs of stress on the job can include:

- Ñ Errors
- Ñ Absenteeism
- Ñ Conflict
- Ñ Low morale
- Ñ High staff turnover
- Ñ Poor decisions/no decisions

Ñ Accidents

What are the symptoms of stress overload, when our bodies have responded too many times to the "fight or flight" call?

- Ñ High blood pressure
- Ñ Risk of heart attack
- Ñ Risk of a stroke
- Ñ Risk of diabetes
- Ñ Headaches and migraines
- Ñ Always tired
- Ñ Always angry
- Ñ Not feeling much of anything (shutting things out)

## Stress Inventory

### Inventory

Rate each statement as it applies to you on a scale of 1 to 5 with 1 meaning never, 2 rarely, 3 sometimes, 4 often, and 5 always.

Score	Statement
	My job description and responsibilities are not clear to me.
	My job description and responsibilities are not clear to others.
	I often disagree with others at work.
	I have trouble identifying what my priorities are.
	I feel like my workload is too heavy or too light.
	I do not get regular feedback from my supervisor.
	I do not have input in work-related decisions.
	I feel isolated from the people I work with.
	I do not have any friends at work.
	I do not feel secure in my job.
	I feel over or under qualified for my job.
	I do not get enough support at work.
	When I have questions or need help, I do not have any resources.
	I react to issues that come up, rather than planning my work proactively.
	I have too much or too little supervision.
	This position is not on my career path.
	I keep quiet about my discontent.
	I am over or under paid.

Score	Statement
	My organization’s leadership changes often.
	I spend a lot of time on meaningless tasks.
	I am tired at work.
	I get upset at work.
	I snap at others.
	I have chronic health problems (such as insomnia, headaches, digestive issues, etc.).
	I can’t stop thinking about work.
	I find it hard to concentrate at work.
	I dislike interacting with clients.
	I feel like I have a negative or pessimistic attitude.
	I don’t know what to do to improve my situation.
	My family and/or friends have commented that I seem unhappy.
	<b>TOTAL</b>

**Scoring**

- Ñ **Below 30:** You have very little job stress. Most people can manage this level of stress and are not likely to burn out.
- Ñ **31-60:** You have a low amount of job stress. Most people manage this level of stress and will not burn out. However, this inventory might identify areas of concern. Make sure to address issues before they become chronic problems.
- Ñ **61-90:** You have a moderate amount of job stress and are at risk of burning out. Look at the items of concern in the inventory and take action.
- Ñ **91-120:** You have a high level of job stress. If you aren’t burnt out already, you will be soon. Start working with your supervisor or human resources team to develop an action plan and reduce your stress.
- Ñ **Over 120:** You have an extreme level of job stress and are likely burnt out. Take action to reduce your stress and improve your working environment immediately.





## Stress at Home

### Budgeting Basics

Finances are a common cause of stress. Not having enough money to pay the bills can wreak havoc on an individual and a family. Plus, finances can limit recreational activities, which reduce your ways to relieve stress. Talk about a vicious cycle!

At the beginning of every month, sit down with yourself (and your partner or spouse, if you have one) and create a budget. You can use a piece of paper and a calculator, a spreadsheet program, or an app on your smartphone – whatever works for you.

Make sure you account for the necessities, like mortgage or rent, car payments, debt payments, heat, light, groceries, insurance, and gas. Don't forget to budget for some fun stuff too, even if it's only \$20. Savings are another important part of your budget – if your car breaks down and you're stuck with a repair bill, it can be less stressful to take it out of the savings account than to put it on a credit card.

If you find yourself struggling to make ends meet, talk to a debt counselor to help reduce your financial stresses. Debt counselors are professional finance organizers, and can help you to identify places to find savings that you may never have thought of on your own.

If you have an extremely high-end or low-end lifestyle, consider whether you can make changes to reduce your stress level. Spending tons of time and/or money on maintaining expensive cars, homes, and boats may not be wise if it's causing you stress. Likewise, pinching every penny when it's not necessary might not be worth it.

### The Everyday Stuff

A lot of work goes into running a household. The good news is that a little planning can go a long way towards reducing household stress and arguments.

#### Chore Charts

Every member of the family over the age of two should participate in household chores. Small children can place their clothes in the laundry hamper, pick up their toys, make their bed, set the table, and feed pets. Older children can help prepare meals (particularly if it's an easy chore like mixing up a salad kit), walk the dog, and load the dishwasher.

It can also be helpful to identify who wants to do what. We all have chores that we don't mind doing, and chores that we don't like, so if you can find some overlap, life will be easier on everyone.

Another option, particularly if you live alone or have a small family, is to hire out some of the chores, such as mowing the lawn. Just make sure you're not trading chore stress for financial stress!





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**Keeping Track**

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**Drainers and Fillers**

**Personal Drainers**

Visualize the way you usually spend your day. Then, list the least rewarding aspects of your day: those places, activities, people, and/or conditions that diminish your energy.

Activities/Conditions/Places /People That...	At Home	At Work	At Play
Annoy you			
Anger you			

Distract you			
Depress you			
Worry you			
Wear you out			
Bore you			
Frustrate you			

**Personal Fillers**

**Visualize the way you usually spend your day. Then list the better aspects of your day: those places, activities, people, and/or conditions that renew your energy and well-being.**

Activities/Conditions/Places /People That...	At Home	At Work	At Play
Excite you			
Calm you			
Free you			
Bring you joy			

Support/nurture you			
Stimulate/challenge you			
Give you meaning			
Make you laugh			
Energize you			

## Planning Tips and Tricks

### Planning Tools

#### Guidelines for Efficient Planning

Life gets much easier when we have a plan and put it into action. Having a plan gives us a place to start, as well as being a way to remember what we are supposed to be doing at any given time.

Here are some guidelines for efficient planning that you can make work for you right away.

- Ñ Did you know that you can save yourself an hour each day just by **getting organized**? When you arrive at work or return home, take a moment to put your coat and keys where they belong. Put papers where you can put your hand on them quickly.
- Ñ Use your **workspace and personal space** (home, vehicle, garage, etc.) to their greatest advantage. There is no need to do a big clean up once a year if you can take a half hour once a week to file, sort, and keep things organized.
- Ñ It is important to identify and operate within **two time horizons**: short and long term. Anticipating events will help you to get things done in the short term which contribute to achieving long-term objectives.
- Ñ An **up-to-date master calendar** can be your most helpful planning tool. If you prefer an electronic version, make sure that it is backed up properly so that you don't lose your data.
- Ñ When things begin to get hectic, a "**Things to do Today**" list helps focus attention on the highest priority items.
- Ñ **Action planning worksheets, milestone charts, and PERT diagrams** (the types of diagrams used in project management) are excellent planning aids when properly used.

- Ñ **Planning contact** with colleagues and staff will help minimize disruptions. Keep a file for each person you meet with on a regular basis, with items to be discussed highlighted for easy reference.
- Ñ The most effective approaches to planning are those **tailored** to meet individual needs. Concepts, procedures, and worksheets should be modified to fit individual circumstances.
- Ñ Experts say nothing should be attempted without prior planning, although applying **flexibility** is also important.

### A Planning Checklist

For every plan you make, cover all these points:

- Ñ What
- Ñ Where
- Ñ When
- Ñ How
- Ñ Who

### Putting Plans into Action with Scheduling Tools

Some useful short term planning tools:

- Ñ A daily to-do list
- Ñ A planner with at least a week at a glance
- Ñ A monthly project list
- Ñ Project planning worksheet

### Organizing Your Work Area and Your Paperwork

A clean desk is not a sign of an empty mind! Don't fall prey to the false notion that a messy work area means you look busy, and thinking that if you look busy, then you're productive. Being active is not the same as being productive!

Here are some tips for organizing your work area.

#### Do it now!

Anything that takes less than 30 minutes should be done as it comes up. If it will take more than 30 minutes, add the task to your planner.

#### Dump.

Throw out or take home all those things you have collected that you don't need or use. We're so used to holding on to things and sometimes are afraid to throw out the wrong thing. We like the same rule for work that we use at home: if you haven't used it for a year (or an entire business cycle), get rid of it, because you obviously aren't using it.




### Setting Up a Routine

Be dull in your everyday routine so you can be wildly creative where it counts. Routines simplify; clarify; and create order, symmetry, and familiarity in chaos and high stress. Routines are the foundation of success.

Top performers in every area of every industry have lives full of routine. Most of us have routines in the morning. Think about your morning routine and how, if you skip it (perhaps because you slept in late, or the dog threw up on the carpet!), you have a tougher time launching your day.

As you decide what kinds of routines will help you, you will need to simplify some things in your life. This is one of those things that is easier said than done, we know, but is well worth the effort. Consider your entire lifestyle. If you have an expensive lifestyle that consumes huge amounts of effort just to maintain, perhaps that time could be better spent doing more enjoyable things than maintaining homes, boats, cars, etc. Similarly, too cheap a lifestyle has a similar result. If you spend hours negotiating the cheapest and the lowest rates, airfares, gas prices, etc., or have to shop for groceries at six locations in order to get the best price on everything, ask yourself if that is time truly well-spent.

Routines include setting time with family, for eating, for sleeping, and for exercising. It means setting a clear time for all routine activities. The way to get routines to work for you is to make sure you are setting them at times that work best for you and your biological clock. Your morning routines should be so good that when you walk out of your house, you feel ready to tackle any problems the world throws at you.

Remember:

- Ñ No activity is more important to ritualize than sleep. This lets your body know that it is time to slow down and prepare to shut off.
- Ñ By fixing mealtimes and planning in advance you'll become vastly more efficient. You'll save money on groceries too!
- Ñ Since exercise has such a powerful effect on brain energy and alertness, place your workout at times of day you most need them.

## Doing it Right

### Being Brave and BOLD

Sometimes we need to approach things with a bit of attitude in order to get things done, and do them well. We're recommending that you can be a bit playful with this, and to be BOLD.

### Balance

Do you spend a lot of time looking for things? Productivity research tells us that the average person spends about 10% of the day looking for things. If that were so, you could gain 5 weeks a year just by getting your retrieval methods under control! If you tend to keep good track of things at work, consider things at home. Do you have a place for your keys, glasses, or lunch bags? Do you ever find yourself searching for things in the morning right before you leave for work? How long does it take you to find a particular file on your computer? (This is often one of the worst time suckers out there today!)

Sometimes you just need to handle the little things that reduce concentration and cause anxiety, like the clutter on your desk and the incomplete jobs. This is the opposite of prioritizing. Do the quick and dirty tasks NOW, even if you just do them for 5 minutes a day for the next two weeks. The crises in our lives are often the result of not handling the little things or not reacting to a niggling feeling that something is wrong. Ignore the little toothache and you wind up with a root canal.

While we talk a lot about balance, if we could accept the fact that each day is not going to be perfectly balanced, we'd probably be a lot more content with our work. Some days there will be nothing but fires to put out, but this can be balanced with days that are quieter and the phone isn't jangling off the hook. Balance can also come from setting your work aside and going for a brisk walk at lunch, or phoning someone that you care about. Achieving balance is not necessarily about spending equal time on the things you like versus what you don't like: it can be about the value of things. A big smile and a quick lunch with someone can balance out a morning spent in a frustrating meeting.

### Test Your Knowledge

What are some ideas that might give you balance during your week?

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## Organize Your Time

If you are receiving tasks and assignments by e-mail, or your boss delegates assignments to you, make sure you organize these incoming items immediately. If something will take more than 30 minutes to complete, schedule it in your calendar and prioritize the items there. If the task will take less than 30 minutes, try to get it done right away so that you are not procrastinating over it, or don't forget that it needs doing.

## Let Things Go

There is a rule we often follow at home that says if you have not used an item of clothing or kitchen gadget for a year, get rid of it. We need to apply the same thing to work: when you no longer need things, get rid of them. It's rare that we actually get rid of things we need, but if we do, it's not likely to be the end of the world. You can replace it if you need to.

If you are someone that has a hard time throwing things out, put them into storage first, and then set up an archiving date within 12 months so that they move from storage (which is usually very expensive) to the shredder or rubbish bin.

If you are going through a stack of paper or items, start out with three piles, and act on them quickly. Sort them into piles to: shred, store, or dump in the garbage.

## Delegate

Don't waste your time doing things that somebody else can do, especially if they can do them better than you. Save your time for those things which you are uniquely qualified to do. In addition to easing up your workload, delegation helps your staff to learn new things and to take risks where they have you there for back up if needed.

Delegating does not mean that you "give away" work completely. As the owner of a task, you must remember that you are ultimately responsible for the results that are achieved.

If you are not in a leadership position, you may be thinking that you don't have anyone that you can delegate to, but that's often not the case. In many work teams, we can delegate laterally to a colleague who has a particular expertise, who is looking for some skill development, or simply has some extra time.

In *The Creative Edge*, author William C. Miller defines five levels of delegation:

- Ñ **Tell:** "Based on my decision, here's what I want you to do."
- Ñ **Sell:** "Based on my decision, here's what I want you to do, because..."
- Ñ **Consult:** "Before I make a decision, I want your input."
- Ñ **Participate:** "We need to make a decision together."
- Ñ **Delegate:** "You make a decision."

You must find ways to delegate, no matter what your position is. Learn to clearly define who is to do what and let them show you that they can do it. Make sure your communication is clear so that they

know what your expectations are and any limitations of the assignment (i.e. budget, time frames, or other resources).

There are five steps to the delegation process:

- 1) Explain why the job is important.
- 2) Describe what is needed in terms of results (not how, but what).
- 3) Give the person the authority they need to do the job.
- 4) Indicate when the job needs to be completed and get agreement.
- 5) Ask for feedback to ensure a common understanding.

### The Story about Everybody, Somebody, Anybody, and Nobody

There was an important job to be done and **Everybody** was asked to do it. Everybody was sure that **Somebody** would do it. **Anybody** could have done it, but **Nobody** did it. **Somebody** got mad about it because it was **Everybody's** job. Everyone thought that **Anybody** could do it, and **Nobody** realized that **Everybody** wouldn't do it. It ended up that **Everybody** blamed **Somebody** when actually **Nobody** blamed **Anybody**.

### Putting an End to Procrastination

In some workplaces, it seems to be impossible to get everything done. This session will help you prioritize what does need to be done and sort it out from things that you could do, but may not have the time to finish.

Brian Tracy wrote a great little book called *Eat that Frog!* that helps people get over procrastinating. He also plays with a couple of quotes from the writer Mark Twain that help us to remember what we are meant to do, and how to stop putting things off. The idea is this:

“If the first thing you do each morning is to eat a live frog, you can go through the day with the satisfaction of knowing that is probably the worst thing that is going to happen to you all day long.”

We are often guilty about procrastinating, and this stops us from getting things done. And as you likely already know, when we procrastinate about one thing, it can also interfere with getting other things done.

As Mark Twain said, “The rule of frog eating is this: If you have to eat two frogs, eat the ugliest one first.”

This quote is about taking the frog – the thing we are procrastinating about – and getting on with eating it. Clearly, after you've eaten a great big frog, everything else you have to do that day is going to be easier than what you started off with.

By procrastinating, that thing we are putting off often becomes a bigger and more daunting task than it really is, and the more we think about (rather than doing something about it), the more space it can take up in our head.

This is a very simple concept that can have a profound impact on our results. There is no self-satisfaction in knowing that we are letting things get away from us, and we feel better and more motivated when we go ahead and get these things crossed off our to do lists.

**Test Your Knowledge**

**Do you have a frog or two waiting for you at work?**

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**What is standing in the way of eating that frog?**

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**Getting Organized**

Getting rid of clutter is one of the best things we can do to make a more efficient work environment. For some people, this is a daunting task. If you tend to accumulate clutter, or are embarrassed about it, this task can best be done on a weekend, and with a friend. In addition, we recommend that when you schedule time for this task, you double it. An hour to clean out our office never seems to be quite enough, so allow yourself the luxury of two hours instead.

**Surface of the Desk**

Look at your desk. The object is to purge both the work surface and the contents of the desk. If the surface is already clear, that’s great! However, if there are items on the desk, ask yourself if they are necessary and/or in an effective location.

- Ñ Check the position of the desk: Is it facing the door and making interruptions more likely?
- Ñ Is the lighting adequate?
- Ñ Is the phone where it can be reached easily?

- ☞ Is there a better arrangement possible?
- ☞ Is the seating/chair adequate?

Your first step should be to get rid of things that should NOT be on the desk. Check everywhere. Look under the blotter, on the walls surrounding the desk, in trays, etc. Collect all bits and pieces and de-clutter by noting the information in an appropriate spot and discarding it.

### Contents of the Desk

Then move to the contents of the desk. Focus first on the tools you use, such as pens, pencils, and erasers.

Check to make sure of the following:

- ☞ You have all the tools you need and they are in good working order.
- ☞ Tools are organized so that similar tools are together and easily accessible. Useless tools should be discarded or moved to an area to be fixed.
- ☞ Group like items together; for example, stationery, envelopes, and stamps are all in one drawer.
- ☞ Store any extra supplies in a supply area.
- ☞ Tools should be stored in a shallow desk drawer and are not on the desk.

### Guidelines for Keeping a Piece of Paper Am

#### I going to need to refer to this later?

- ☞ YES: File it
- ☞ NO: Recycle it

#### Do I have a digital copy that will suffice?

- ☞ YES: Recycle it
- ☞ NO: File it

#### Is it directly related to me or will someone else have a copy that I can refer to?

- ☞ YES: Recycle it
- ☞ NO: File it

#### Do I need to keep this for legal reasons?

- ☞ YES: File it
- ☞ NO: Recycle it

#### Does it fit in my filing system?

- ☞ YES: File it
- ☞ NO: Recycle it

#### If I file it, will I be able to find it?

- ☞ YES: File it
- ☞ NO: Recycle it

## Organizing Your Files

### Sorting Based on File Type

The key principles of retrieval are:

- Ñ Group similar things together
- Ñ Place them in their own space or container
- Ñ Label them clearly

### File Categories

There are some additional steps we can take depending on what kind of files you are trying to organize. We can usually divide our files into four categories.

### Working Files

These include your current projects, routine functions, and quick references. These are the files where you have 80% of your work. These should be within arm's reach. They usually contain the following:

- Ñ The projects you are currently working on. This file should be cleaned occasionally to move projects to a reference file or to eliminate duplication.
- Ñ Fingertip information you need on a routine or daily basis, such as phone lists, client addresses, and computer codes.
- Ñ A follow-up file for each person with whom you come in contact on a regular basis, where you keep track of all correspondence with that person.
- Ñ A file for routine functions such as sales reports or other functions performed daily/weekly/monthly.

Since these files should be within reach, they might be in a large desk drawer. Make certain they are in file folders, labeled in large letters, and then placed in hanging file folders that are also labeled.

Usually it is more efficient to label hanging folders by category, rather than by a letter of the alphabet. Then categories can be alphabetized or color-coded.

### Reference Files

These are files you must refer to frequently as you work on current projects. This is where the bulk of your files will be located. Since you use these files regularly, they need to be kept handy, but not necessarily within arm's length. The most important thing is to arrange all information in such a way that you can pull information out of the file easily.

Key questions for you to consider as this file is set up:

- Ñ What do I want to keep?
- Ñ What do I need to keep?
- Ñ If I wanted this information, could I find it elsewhere?

Information that should be in the reference file includes:

- Ñ Research for future projects
- Ñ Past projects to which the client refers

It can be helpful to consider key functions or components of your job, and make these the major categories for reference files. Other files might include:

- Ñ Sponsor files
- Ñ Administrative information

Cull all duplicates or useless paper. Have a recycling bin and shredding container nearby.

Establish subject categories, and label both file folders and hanging files. Put the file structure on paper prior to starting the filing.

Label file drawers and create a master list of files if the amount of information is large. Remember to use large, clear print with a fine tip felt marker.

### Archive Files

These are the files nobody looks at. You keep them because the law says you must, because you are afraid you'll need them if they are thrown out, or because nobody wants to take the time to do anything about them. They should be kept in a designated location far from your work area.

### Disaster Files

This is one file that contains all vital information, including identification and financial references, in case you have to vacate the office unexpectedly. You can also have a file like this at home so you have things organized in the event of a disaster.

### Electronic Files

The key rule is that the file structure used in paper files and electronic files should parallel each other so that you can find things quickly. Use keywords and search programs to help you find your files even faster. If you are not sure how to use keywords, the "help" section of your software program should be able to show you how.

In this information age, we have to know what we need to keep and what we don't need to keep. Don't keep what you don't need. Don't ask, "Will I ever need this?" The answer is almost sure to be "Maybe." Ask instead, "Where could I get this if I needed it?"

### Briefcase

Your briefcase should be organized with:

- Ñ Tools that are needed frequently when away from the office
- Ñ Reference files that are frequently referred to, such as telephoner lists
- Ñ Working files that are needed
- Ñ A system for expenses

## The Batching Technique

The balance to the “do it now” approach is batching. With this technique, you save several of the same type of things to do at once. Sometimes that is a more effective technique than doing each thing singly.

We can even batch our interactions with others. Do you ever remember what you wanted to ask someone or tell someone just after they walked out of your office or you hung up the phone? You might save quite a bit of time by having a file for each of the people you interact with often.

Here are some examples:

- Ñ **Word processing files:** Batched and placed in categories. Develop a tree of directories and subdirectories, using the same categories as in the paper filing system.
- Ñ **E-mail messages:** Again, create directories and save only those messages that will be referred to again. Delete e-mails that you will not need again. (If that panics you, move them to an archive file.)
- Ñ **Voice mail:** Listen to your voice mail message. Does it do a good job of telling the person at the other end of the line what he/she should do? Try keeping a list of all the people you need to call, and make those calls all at once.

## Managing Your Workload

### Managing E-mail

One of the greatest demands on our time is e-mail, and so it is important to put it in proper perspective with the demands of our jobs. We’ve become a society where we expect replies to e-mail immediately. Many people send e-mails out to more recipients and with more frequency than is often required.

While e-mail has become a benefit in many ways, it is also a huge contributor to people’s stress. And it’s not enough to just be able to check an e-mail on a computer somewhere; many managers have a hand-held device that allows them to be connected to their e-mail 24/7.

Let’s see what kind of an impact it has on your day in terms of time.

- Ñ How many e-mails do you receive in an averageday? \_\_\_\_\_
- Ñ How many of those e-mails do you replyto? \_\_\_\_\_
- Ñ How many e-mails do you send (not including thereplies)? \_\_\_\_\_

Let’s say that an average e-mail takes you three minutes (and that is only if they are short and need very quick thinking on your part).

- Ñ Total from above: \_\_\_\_\_ x 3 = \_\_\_\_\_
- Ñ **This is the total number of minutes per day that you manage e-mail.**

Look carefully at that number. It is not unusual for us to talk to managers who receive, reply, and create up to 100 e-mails per day. 100 e-mails a day is equivalent to 300 minutes, or five hours of time each day!

Since we normally have lots of additional tasks in the day in addition to e-mail (like meetings, administration, performance management, and coaching), is it any wonder that we struggle to get through the day? Add to this the time you might take to read reports, meeting minutes, or agendas; process information; or work on projects; eat a healthy lunch; and perhaps invest some time in your people; and it's no wonder we are often looking for more time!

## Workload Analysis

These questions form the basis of workload analysis:

- Ñ What are the things you have to do every day? How much time must you allot to each thing?
- Ñ What are the things you have to do each week? How much time do you allot to them?
- Ñ What are the things you must do each month? How much time does each item take you?
- Ñ What are the things you do quarterly or annually? How much time do they take?

It's a real pain, but by doing this analysis, you will probably realize that there are more things to do than there is time to do them. Keep in mind that most of us are overly optimistic about how much time we need for activities and don't allow enough time for them. This is the point at which you begin to prioritize. You may even see that some of the things you are doing don't have any real impact on your job; usually when you get everything tallied up, you have about two and a half minutes a week to do your primary job for your organization.

We forget to schedule things if they are just in our head. You aren't being paid to be a calendar. If you schedule them in, in pencil, you can begin to protect them. We don't like doing this. It brings face to face with the reality of our situation. It's scary.

### The 168 Hour Plan

Let's look at how you spent your time last week. There are 168 hours in seven days, so consider how you used them. Jot down how many hours you spent in each category.

Task	Number of Hours
<b>Personal Life</b>	
Sleeping/eating	
Grooming/hygiene	
Driving or riding	
Exercising	
Cleaning/maintenance	
Talking to family/friends	
Mail/personal business	
Volunteering	
Praying/attending church/meditating	
Studying/reading	
Relaxing/watching TV	



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**How many things did you do that you planned to do?**

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**How many things did you put off?**

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**What is it you want to spend more time doing?**

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**What do you want to do less?**

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**Are you happy with the way you spent your time?**

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**How many of these hours did you spend on the things that you said were a high priority for me?**

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**When I look at my life so far, I'm glad I took the time to...**

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**I regret I haven't taken the time to...**

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**I can change this by...**

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### Further Reading:

- ✓ *Understanding Stress, By Bruce Wilson, (2009)*
- ✓ *Stress and Work: Perspectives on Understanding and Managing Stress, edited by Satish Pandey, D. M. Pestonjee, (2013)*
- ✓ *Strategies for Managing Stress, By Julia M. Whealin, Lorie T. DeCarvalho, Edward M. Vega, ,(2008)*
- ✓ *Strategic Stress Management, By Valerie J Sutherland, Cary L. Cooper, (2000)*