

### Introduction

This checklist is designed to help relieve the stress of having an excessive workload. Learning to Say 'No' without causing offense or alienating your boss is a skill all successful managers develop. Using a series of questions you will be able to identify which additional tasks you should incorporate into your workload and those you should politely decline. Always make sure that 100% of your attention is on defining exactly what the task entails. This will help you avoid being railroaded into accepting the task when distracted. Not everyone plays fair! So make sure you give yourself time to make a considered decision before accepting or rejecting the task.

Credit: <http://www.free-management-ebooks.com/dldchk/dlchpr-workload.htm>

### 1. Create an Environment

#### Create an environment in which you can actively listening to the request

- Ask for a minute to finalize what you are working on before you talk.
- Remove distractions find a quiet office or area to hold the conversation.
- Clear your mind of other issues so you can listen to what is being said with an open mind.

### 2. Ask questions to define

#### Ask questions to define:

- Exact requirements of the task - timescales, resources & skills
- Objectives of the task.
- What goal is it fulfilling?
- Who is the task stakeholder, i.e. who has an interest in it being performed.
- Who is the customer?
- How important is it to them?
- What level of urgency have they attached to it?
- What dependencies does this task have?

### 3. Assess the level of impact the task

#### Assess the level of impact the task timescales and requirements will have on your current workload.

Use the type of grid our template 'Prioritizing Tasks' has to compare the level of urgency and importance your current essential tasks have compared to the requested task. Highlight the latter so you can easily discern which of your existing tasks would be most affected and how.

Included within these criteria are your assessment of the following factors:

- Resources & Skills required
- Dependencies
- Stakeholder & Customer level of authority

### 4. Explain your reasons behind saying 'No'

**Explain your reasons behind saying 'No'.** Negotiate your workload from a point of knowledge:

- Explain the conflicts and inter-dependencies you have identified.
- Outline the risks accepting the task would create and their level of acceptability to the customer / stakeholder.
- Where possible recommend an alternative approach. (This doesn't mean dumping it on a colleague).

### 5. If you are given no choice

#### If you are given no choice other than to accept the task then:

Make sure you communicate in the most appropriate manner:

- Your understanding of the task requirements.
- Impact on other key tasks your acceptance will have.

