

## ACTION SHEET

# Managing Overload:

Balancing Capacity with Demand in the Midst of Massive Change

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## PART 1

### Mindset is the Magic Sauce

Mechanics (formal and informal approaches to doing the right steps) are important for balancing capacity with demand. BUT many leaders overemphasize mechanics. The most common shortfall in establishing and honoring priorities is failing to bring the necessary **mindsets** to the task.

Mindsets that are essential to successfully setting and maintaining priorities are:

1. **Courage.** Leaders who are successful at managing essential change bring courage—the courage to face reality and cut through to the essence of what needs to happen to succeed.
2. **Discipline.** Once decisions are made, these leaders take action and follow through despite the obstacles or discomfort that arises.

#### Mindset Reflection:

*What, for you, is **courage**?*

*What stands in the way of your being courageous?*

*What do you need to release in order to be courageous in establishing and honoring priorities?*

*How would your leadership team respond to these questions?*

*What, for you, is **discipline**?*

*What stands in the way of maintaining discipline to take action and follow through?*

*What do you need to release in order to maintain discipline in taking action and be vigilant when following up on your priorities?*

*How would your leadership team respond to these questions?*

PART 2

## Ability to Absorb Change

Humans have limits to how much change we can absorb. Change requires physical, emotional, and cognitive resources—resources that are also demanded by our day-to-day work. When facing excessive change expectations, people start displaying dysfunctional behavior. Productivity drops, and quality degrades. People go through the motions of installing change rather than seeing the change through to full realization.

This happens to organizations, too, often due to the buildup of many overlapping, simultaneous changes or disruptions. When progress is disrupted to the point that the organization and its people are unable to deliver, this is a sign of **organizational overload**. This overload occurs when demand experienced by the organization exceeds the organization’s capacity to absorb or adapt. To avoid this situation, we must pay attention to how much change our people and our organizations can handle at one time.

### Demand Reflection

*Am I feeling overwhelmed by the level of demand that I am currently shouldering?*

*Is my leadership team feeling this sense of overload?*

*What about our staff and partners?*


PART 3

## Process of Managing Overload

**Recognize:** To what extent is your organization experiencing overload?

*What do the data say? Is your organization exhibiting overload symptoms?*

**Overload Symptoms Assessment**

Aspect	Data	Trend 
Performance and productivity		
Quality		
Changes – merely ‘installed’ or fully realized?		
Workplace strains, such as health issues, interpersonal conflict, communication breakdowns, poor decision-		

making, increased absences, higher turnover		
Morale, such as negative climate, increased bickering, poor collaboration, lack of enthusiasm, or loss of confidence in leadership		

*Do you anticipate this to be short-lived overload or moderate-to-significant overload for the long haul?*

**Magic Sauce Check-in:**

Courage—What would it look like to turn up the courage on what to include in the chart above?

Discipline—Have you challenged yourself to ensure that you have the full picture above?

**Explore:** What are the sources of the change-related demand?

Are there elements that could be altered to free up your organization’s capacity to absorb change?

Energy to emotionally, cognitively, and physically adapt is essential to change capacity. If you anticipate your level of overload to be moderate-to-significant and this is a long-term situation, identify elements of your change initiatives that, if altered, could possibly free up capacity.

**Reflection: Sources Demanding Change**

*What organizational projects are demanding change?*

*What elements—if altered—could possibly free up capacity?*

*What would it look like to adjust:*

- *Volume of change being imposed?*
- *Pace or momentum of the change being implemented?*
- *Complexity of the change?*
- *Anticipation of future change (which has psychological tolls, much like knowing 30 minutes remain of a brutal workout)?*

ENERGY DIVERTERS

Capacity gets used up when energy is diverted by:

- + day-to-day operations
- + new initiatives
- + weak leadership, lack of knowledge of how change unfolds, and/or insufficient implementation plans
- + unmotivating work environment (e.g. low morale, no room for advancement)
- + external factors—right now the big one is COVID-19

- *Coordination among various change efforts?*

**Magic Sauce Check-in:**

Courage—What would it look like to turn up the courage on the above reflection? What are you afraid to admit?

Discipline—Do you have the full picture above?

**Action:** Reduce change-related demands.

Leaders often underestimate the disruption that will be experienced and/or the capacity that will be required to fully realize a change. They fail to conduct proper due diligence on their organization’s readiness for change, and they proceed as if there is unlimited capacity to adapt. This leads to overload.

**Four steps for leadership action:**

**1. Take stock of current initiatives.**

*In the table below, list ALL of your organization’s existing and anticipated change efforts.*

Later you will be asked to make some decisions, but right now, it’s about being honest and forthright. To make this as painless as possible, list everything the first time you do this exercise, even if skimping seems like it will be the more efficient way to proceed.

ALL Existing Change Efforts
ALL Anticipated Change efforts

**Magic Sauce Check-in:**

Courage—What would it look like to turn up the courage on the above reflection? What are you afraid to list?

Discipline—Do you have the full picture above?

**2. Prioritize efforts.**

*Categorize each of the change efforts you listed above as a (1) crucial imperative, (2) good idea, or (3) unacceptable activity. Define what makes an initiative crucial? What makes it a good idea? What makes it unacceptable?*

And remember: In a different time, unacceptable initiatives may have been crucial or good ideas, but you are judging them based on current circumstances.

You will likely be tempted to “upgrade” changes that are near and dear to your heart. Don’t do this. No one wants to give up a hard-fought issue or program that they have been championing, but for the good of your organization, you must be honest and objective during this exercise.

Change Effort	(1) crucial imperative, (2) good idea, or (3) unacceptable activity

As you go into this exercise with your team, be clear with them about any non-negotiables that should frame this analysis. For you, these non-negotiables might include such items as:

1. Principles—that must be sustained going forward no matter what
2. Programs—that must be retained in some form
3. Parts of your strategy—that must retain essential aspects but where there could be flexibility in timing and scope

**Magic Sauce Check-in:** A “burning platform” situation exists when the price of status quo is no longer acceptable or sustainable.

**Courage**—Is your bar high for determining what is a crucial imperative? What would it look like to turn up the courage on the chart decisions above? What are you afraid to demote?

**Discipline**—Do you have the full picture above?

**3. Make decisions and take action based on your analysis.**

*Write down all the things you are going to start, stop, protect, or change.*

Crucial imperatives: protect at all costs; continue or rescope to optimize the crucial element

Good ideas: might slow down, rescope, delay, or terminate

Unacceptable activities: release

Change Effort (From step 1)	(1) crucial, (2) good idea, or (3) unacceptable (From step 2)	Start, stop, protect, change (rescope, delay)

Even after eliminating unacceptable activities, your organization may still be overloaded. In this case, you need to re-evaluate good ideas or even crucial imperatives in order to lessen the change burden and get back to operating within your organization’s capacity.

**Magic Sauce Check-in:**

Courage—What would it look like to turn up the courage on the chart decisions above, in honor of your mission?

Discipline—Are there good ideas or crucial imperatives above that you need to rescope or delay to further reduce overload?

**4. Remain vigilant and protect your priorities.**

*Ensure that you communicate your priorities and decisions clearly to the stakeholders inside and outside your organization. And establish a mechanism or process for applying consequences as needed to prevent unhelpful or non-strategic demand from creeping back in.*

**Magic Sauce Final Check-in:**

Prioritization choices have nothing to do with comfort. Harness courage and discipline mindsets and review the following:

1. Your audit: Did you put absolutely everything in front of you at the outset? The number and nature of energy-consuming demands limits our capacity to change. Making sure you have a full picture takes courage and discipline.
2. Your decisions: Some of what you thought was imperative might have to shift to a good idea and be re-scoped, delayed, or even terminated. Use courage and discipline to honor your mission and conserve energy for essential change activities.

3. Demand creep. Once you have made these decisions, you may see initiatives creep back in or discover that some directives were not executed. Employ courage and discipline to maintain vigilance and stay within the boundaries of the decisions you have made.

#### MANAGING OVERLOAD SUMMARY

- ✓ Be attentive to signs you are approaching or have exceeded your organization's capacity to absorb the demands placed on it.
- ✓ Be mindful of the levels of disruption you may be introducing as a result of your decisions and actions.
- ✓ Exercise courage and discipline when deciding and acting to reduce demand.
- ✓ Remain vigilant about preventing "demand creep."

**Prepare for discussions with your senior team. What can you start doing NOW?**