

Three tools for prioritization when the path is unclear

Keeping the plates spinning is a continual challenge for most knowledge workers. While we've learned to expect the unexpected, we haven't figured out where today's "unexpected" fits on an already too long list.

An increasing number of workers report being **completely overwhelmed** by the amount of work they are being asked to do. Leaders have been quick and sincere in their efforts to help employees maintain balance, but it hasn't been enough. We can't keep working at **surge capacity** for the long-haul.

To achieve long-term sustainability, we need a new strategy for managing multiple priorities and adapting quickly as circumstances shift. Because few individuals have a holistic view of the system and the inherent trade-offs that are needed, you can't just empower them to decide autonomously. Instead you need to provide organizational guidance on how to choose between multiple demands. Absent that step, employees conclude they either have to "do it all" or risk letting something important slip.

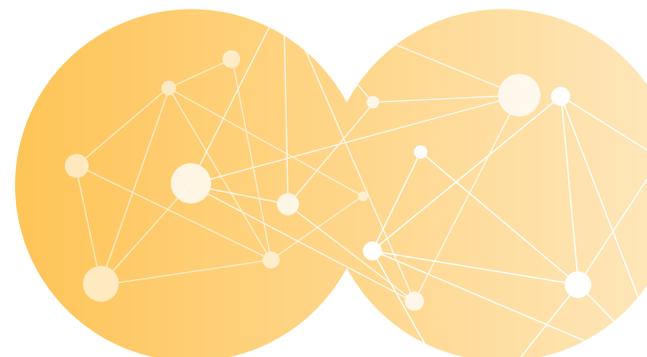
Competing priorities can grind progress to a halt just when you need it most.

This paper offers a path forward.

Transform overwhelm into clarity and action

We recommend three possible approaches to clarifying priorities on a continual basis:

- 1 Create *even over* statements
- 2 Adjust your operating model
- 3 Allocate assets / portfolio



1 Even over statements

Even over statements are a powerful way to declare what matters most.

Consider this scenario: You run a customer service organization. Your strategy is to differentiate through exceptional service, so you make significant investments in new-hire training. Until now, you've been able to do that while meeting margin targets. However, you've just hired a new cohort of frontline employees at the same time that the corporation's discounting strategy has led to higher call volume at less revenue. A trade-off is necessary. Should you put the new employees on the phones sooner by cutting their training short, thereby risking a decline in customer experience? Or should you ask the tenured people to work overtime, which will eat into your margins?

An *even over* statement zooms in on the decision to be made:

- For this quarter, we prioritize employee development *even over* margin targets.
- For this quarter, we prioritize margin targets *even over* employee development.

Notice a vital component of an *even over* statement: both options are good. Either statement is valid and could be the right trade-off for your organization. *Even over* statements don't mean a trade-off has to be made, but give guidance in the event that one is genuinely required. Other examples include:

- In this long-range plan, we value environmental sustainability *even over* margin growth.
- This fiscal year, we prioritize increasing diversity *even over* meeting headcount targets.

The other benefit of *even over* statements is that they contextualize decisions which may seem out of alignment with your stated values. In the customer service example, if you decide to skimp on training in the short-term and don't communicate why, employees may assume that you are abandoning your commitment to service. The *even over* format makes the logic easily understandable for your team.

ACTION PLAN:

- ① Review current priorities.
- ② For any that might require trade-offs, create an *even over* statement that chooses between the viable options.
- ③ Communicate them broadly.

2 Operating model

Sometimes you have competing priorities for which you can't write an *even over* statement. This is particularly true when your organization serves multiple stakeholders or has dual mandates.

Faced with the necessity to address equally important priorities, employees become overloaded, especially when demand from stakeholders is frequent, urgent, and/or unpredictable.

This challenge is even greater when the dueling priorities require very different kinds of attention. Analysis of discounting trends requires lots of heads-down focus time. Getting a particular discount approved is usually an unplanned, urgent activity that supersedes other work.

Instead of constantly managing this kind of dichotomy, consider designing your operating model to serve it instead. Here are two proven models:

- **Design around the type of work.** Have one team that responds to the day-to-day needs from stakeholders (e.g., a “deals desk” in the sales operations example) and another team that drives long-term priorities (e.g., an analytics team).
- **Design around outcomes.** Alternatively, you could create separate teams, each dedicated to support the outcomes for a specific stakeholder, customer segment, geography, or product.

Like priorities, an operating model should also be dynamic. Be sure to build in learning loops for continuous improvement and give the team opportunities to move from one area to the next over time.

ACTION PLAN:

- ① Ask yourself if your priorities are creating impossible trade-offs for the team.
- ② If the answer is yes, engage the group in a generative dialogue about how to design your operating model to support the business objectives and well-being of the team.
- ③ Communicate them broadly.

3 Asset allocation / portfolio

A third option is to treat time like money and allocate it as you would a financial portfolio. In this method, you define the major priorities for your organization and estimate the time allocation required from each function. Include business-as-usual activities in the chart so you have a true picture of how your resources are mapped against the work. The result should be a time-asset allocation as illustrated below. In this example, you’ll see that Function #4 is well over 100 percent. This should trigger a creative problem-solving exercise at the leadership level, rather than asking the employees within that function to prioritize at an individual level.

	Priority #1	Priority #2	Priority #3	BAU	TOTAL
Function #1	20%	10%	0%	70%	100%
Function #2	50%	0%	25%	25%	100%
Function #3	10%	10%	10%	70%	100%
Function #4	25%	25%	25%	50%	125%
Function #5	0%	0%	50%	50%	100%

The benefit of this approach is that it cascades nicely from the organizational level to the individual one. For example, Function #2 could replicate this exercise for teams, and then each team can do the same for team members, as illustrated below.

	Priority #1	Priority #2	Priority #3	BAU	TOTAL
Function #2	50%	0%	25%	25%	100%
Sanjay	35%	0%	30%	35%	100%
Barb	25%	0%	15%	60%	100%
Sheika	75%	0%	25%	0%	100%
Alvin	65%	0%	25%	10%	100%

This allows managers to help each team member make decisions about where and how to invest their precious time and energy. It also helps you notice when you begin to exceed capacity or need to make other adjustments. Finally, it gives the team visibility into the broader portfolio and how they can support one another.

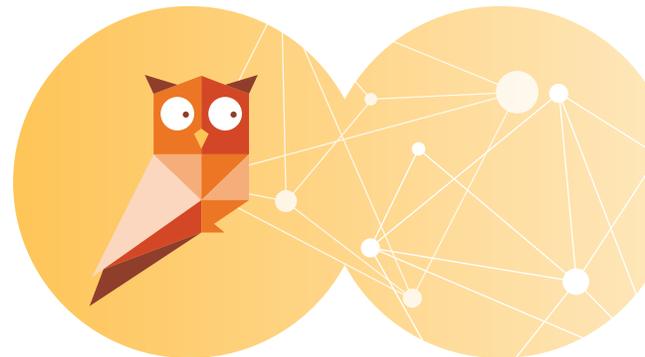
ACTION PLAN:

- ① Create an asset allocation for your priorities and/or team.
- ② If any function or individual is over 100 percent capacity, proactively problem-solve by reducing scope, extending timelines, moving work, or increasing capacity.
- ③ Communicate them broadly.

Clarity clears the way to move ahead

Our current context is increasingly uncertain, dynamic, and complex. As we continue to navigate the changing world of how we work, being explicit about priorities builds agility and resilience. With a commitment to disciplined prioritization, you can decrease the noise and give your team guardrails to help them focus on what matters most.

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