

TIP:

It is recommended that you post the balance wheel on flip chart paper, white board, or poster board so that it remains visible as you proceed with the following explanation, examples, and individual exercise.

THE WORK BALANCE WHEEL

INTRODUCE
CONCEPT OF WORK
BALANCE WHEEL

POST SLIDE 8

"YOUR BALANCE
WHEEL AT WORK"



- These are examples of "major work roles," or "key accountability areas." These may also be thought of as major priority areas. In other words, these represent sample areas in which workers spend a significant portion of their time.
 - Obviously, each job has a unique 'Work Balance Wheel.' This exercise can be completed with the assistance of an individual participant's job description. This exercise is often a real eye-opener to some participants because it forces them to see where they **should** be spending their time at work and how different that is compared to where they **actually** spend their time.

TIP:

If you are delivering this training to either an intact workgroup or to a homogeneous job group, you might find it helpful to alter the 'Work Balance Wheel' so that it more precisely reflects the particular interests and experiences of your participants.

PARTICIPANTS
DRAW WORK
BALANCE WHEEL

- **To participants:** "Draw a 'Work Balance Wheel' that accurately reflects your job. Remember, your balance wheel should reflect the major work roles or key accountability areas unique to your job." (allow 10 minutes for this step)

PARTICIPANTS
IDENTIFY MAJOR
RESPONSIBILITIES

- **To participants:** "You now have a diagram that illustrates your major work roles or key accountability areas, so you are beginning to see the emergence of an accurate representation of the types of time demands that your job places on your workday. But the balance wheel alone does not provide you enough information. To get a more complete picture, please take the next ten minutes to identify the major responsibilities that flow from each of the major work roles you identified within your balance wheel. Your participant manual has a table for you to complete this part of the exercise and there is an example provided for you."
 - Review the example below, which is provided in the participant manual. Check with participants to ensure their understanding prior to them beginning this portion of the exercise.

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■ **Your work roles & responsibilities:**

ROLE	RESPONSIBILITIES
E.g. - Sales	E.g. - New business acquisition
	Customer retention
	Product knowledge
	Customer education

DEBRIEF THE WORK
BALANCE WHEEL &
RESPONSIBILITIES
EXERCISE

- After the participants complete this part of the exercise, ask them for feedback about the differences between what their jobs dictate they spend their time on versus what they are actually spending their time on at work.
- After receiving this feedback, ask participants what they think are the most likely reasons for discrepancies between what they and other workers spend their time on versus what the organization dictates their time should be spent on. Possible responses include:
 - inaccurate understanding of job
 - inaccurate description of job
 - organization has done a poor job of differentiating separate job functions throughout the operation
 - too much work to do and too few people to do it
 - worker dislikes defined job tasks and prefers spending time on other tasks
 - worker does not have ability, knowledge, or interest to do assigned tasks
 - worker does not know what assigned tasks are
 - worker lacks proper motivation
 - job tasks are not motivating
 - poor supervisor feedback and performance management processes
 - etc.
- Once you have reviewed potential reasons for the discrepancies, point out that they tend to fall within one of two categories:
 1. Problems that stem from the person doing the work (e.g., worker does not have ability, knowledge, or interest to do assigned tasks, etc.)
 2. Problems that have their root cause(s) within the work or organization (e.g., too much work to do, etc.)
- Remind participants that the focus in this workshop is on problems that stem from the person doing the work.
 - Problems that originate from the work or from the organization require senior management commitment and intervention and this is outside the scope of your training.

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