



Center for  
Creative  
Leadership  
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WorkLife Indicator™

## *Increasing Your Effectiveness On and Off the Job*

Feedback Report and Development Planning Guide

*Prepared for Sample Report*

*11 October 2011*

Center for Creative Leadership  
In conjunction with Ellen Ernst Kossek, Ph. D.

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## WorkLife Indicator: Increasing Your Effectiveness On and Off the Job

### Feedback Report and Development Planning Guide

The Center for Creative Leadership gratefully acknowledges the contribution of the following individuals whose work and dedication made the WorkLife Indicator possible:

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## Section 1: Introduction

In today's world of constant access and fast-paced lives, everyone struggles with finding the best way to manage their energy and time. What works well for someone else may not work well for you. Developed in partnership with Ellen Ernst Kossek, Ph.D., WorkLife Indicator is a self-assessment that measures how you manage the boundaries between work and the rest of your life. Dr. Kossek's work, popularized in the book *CEO of Me* (Kossek & Lautsch, 2008), provides the foundation for understanding the choices and trade-offs related to managing the boundaries between work and family. We use the term "family" broadly, including traditional family members as well as close friends and others. Identifying your work preferences will help you better understand your approach to managing boundaries and move toward more productive and sustainable ways of managing your time and energy. WorkLife Indicator is not an assessment of your skill, but rather a picture of your behaviors and priorities.

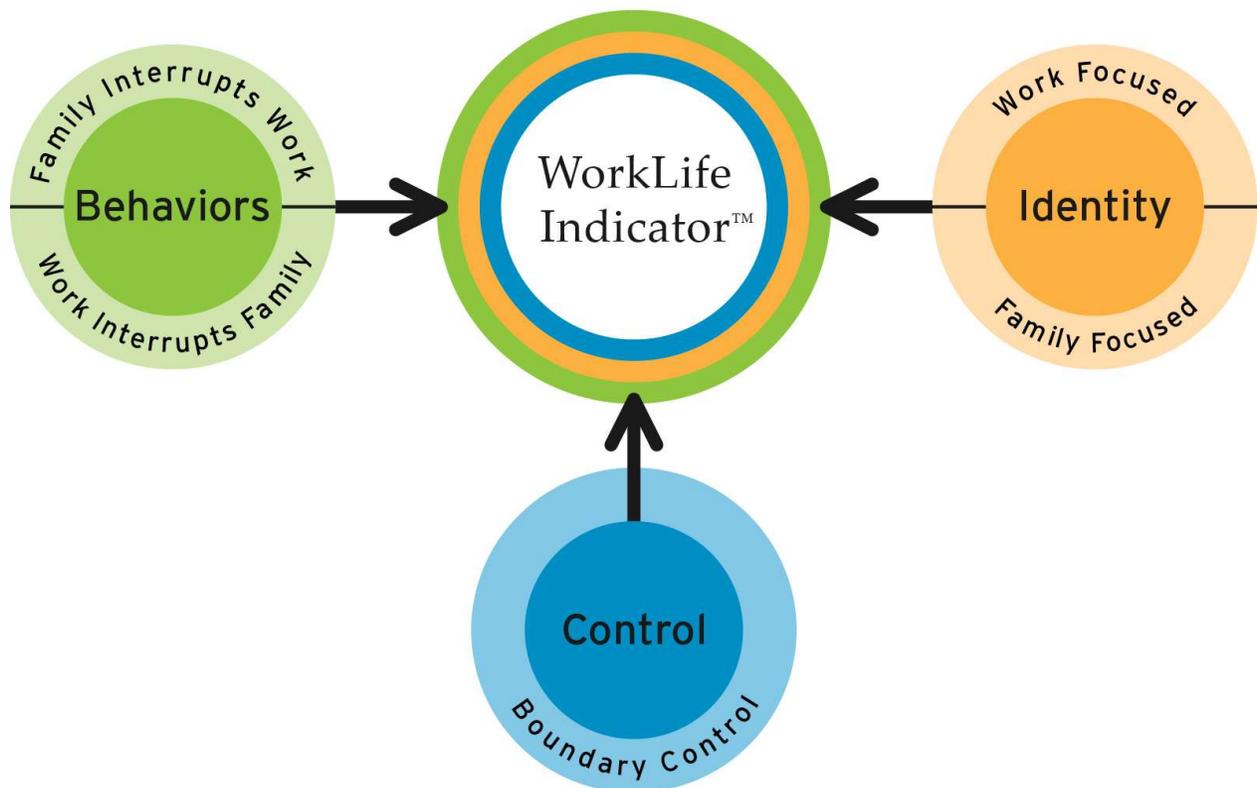
This report is divided into three sections. Section 1 describes the assessment and what it measures. Section 2 provides your results, and offers tips based on your results. Section 3 is a development planning guide that contains step-by-step exercises that help you interpret your results at a deeper level and create a plan for increasing your effectiveness at managing your work-family boundaries.

## WORKLIFE INDICATOR

Your WorkLife Indicator profile is comprised of three factors: Behaviors, Identity, and Control.

- Behaviors** - the degree to which you combine or separate your work and family life
- Identity** - the degree to which you identify with and invest yourself in your work and family roles
- Control** - the degree to which you feel in control of how you manage the boundaries between your work and personal life

Each of these factors is described in more detail on the following pages. These factors combine to influence how you manage the boundaries between work and the rest of your life. The pattern of scores on these factors is your WorkLife Indicator profile.



## BEHAVIORS

The Behaviors factor describes the degree to which one combines or separates the tasks associated with work and those associated with one's personal life. This factor has two dimensions: Family Interrupts Work and Work Interrupts Family. These dimensions indicate the extent to which one allows one's work and family lives to interrupt each other. Listed below are all of the possible approaches measured by WorkLife Indicator.



**Integrators** blend work and personal tasks and commitments. They allow work to interrupt family time or family to interrupt work time or both. They keep up with business calls, texts, or e-mails at sporting events or on vacation. They may also use technology to help a school-age child with homework, or plan a social event with a friend while in the office. Integrators weave work and personal activities together throughout the day.



**Separators** keep work and personal tasks and commitments separated into defined blocks of time. They like to focus on work when on work time, and family when on family time. If they have to attend to a personal matter during the workday, they are likely to schedule it at the beginning or end of the day or handle it during a break or lunch hour. Separators use physical space, their schedules, and their mind-set (home is home and work is work) to keep aspects of their life separated. They have clearly established boundaries protecting work time and family time.



**Work Firsters** allow work to interrupt family. These are the people who are actively involved with business calls, texts, or e-mails at sporting events or on vacation. Many Work Firsters regularly use technology that keeps them connected to work. They focus on work when on work time, and allow work to interrupt family time. They have clearly established boundaries protecting work time, but not around family time. Their behavior suggests that work time takes precedence over family time.



**Family Firsters** allow family to interrupt work, but do not allow work to interrupt family time. They use technology to stay connected with family while at work. For example, they may use e-mail to help a child with homework or to schedule a doctor's appointment while at work. They have firm boundaries protecting family time, but allow work time to be interrupted. Their behavior suggests that family time takes precedence over work time.



**Cyclers** switch back and forth between cycles of either highly integrating family and work followed by periods of intentionally separating them. They follow established, ongoing rhythms of mixing work and family followed by distinct separating of work and personal life to enable focus. Like the tax accountant who focuses on work from January through April, the cycler may then try and compensate for sometimes missing personal or family events, or simply to catch up with all that has piled up on the personal front while still trying to do his or her job.

## IDENTITY

The Identity factor describes the degree to which you identify with and invest yourself in your work and family roles. This factor has two dimensions: Work Focused and Family Focused. If you are work focused, this means that you think of yourself primarily in terms of your profession or career. If you are family focused, this means that you think of yourself primarily in terms of your family roles. It is possible to score high in both areas (Dual Focused) or to score low in both (Other Focused). If you are dual focused, it means that you are equally invested in both work and family roles at the same time and do not place one identity above the others. If you are Other Focused it means you have a central interest that may not necessarily involve work or family.

Your personal results for Identity will begin in Section 2 and will indicate your focus on one of four main identities described below, any of which can be healthy and effective:



**Work Focused** individuals identify with and invest themselves primarily in their work roles. They structure their lives to give their best energy to their work role.



**Family Focused** individuals identify with and invest themselves primarily in their family roles. They structure their lives to give their best energy to their family role.



**Dual Focused** individuals identify with and invest themselves equally in *both* their work and their family roles. They give their energy equally to work and family.



**Other Focused** individuals have a primary identity and investment in life interests that do not necessarily pertain directly to work or family, such as athletics, community, a side job, a hobby, or volunteering. They may invest a lot in family, work, or both roles, but are careful to protect time and energy to devote to an important interest outside the family or work domain.

## CONTROL

This factor has one dimension: Boundary Control. This dimension indicates the degree to which you feel in control as you manage the boundaries between your work life and personal life. It addresses how much influence you feel you have over where, how, and when you spend your working time and how much influence you have managing family responsibilities. Boundary Control is the only factor on which a higher score is better.



**High Boundary Control** - Individuals with high boundary control feel in control of how they divide their time and attention between work and family. They decide when to focus on work, when to focus on family, or when to blend the two. For example; they may decide to stay late at the office to finish a large project. Or, they might decide to attend a school event on a weekday morning and arrive at the office mid-day. Individuals with high boundary control feel they have the authority and ability to make these decisions and to manage any resulting trade-offs.



**Midlevel Boundary Control** - Individuals with a moderate amount of boundary control feel somewhat in control of how they divide their time and attention between work and family. They sometimes decide when to focus on work, when to focus on family, or when to blend the two, but there are times when they feel they have no choice. For example, they can sometimes focus their attention and time on family matters during work hours, but there are times they would like to use another approach but cannot. They may want to separate or integrate more than they are able to. As a result, they often try to limit the amount of times they “cash in this chip.”



**Low Boundary Control** - Individuals with low boundary control do not feel that they are in control of how they divide their time and attention between work and family. They do not decide when they focus on work, when they focus on family, or when they blend the two. In most cases, these limitations are established by the type of job they have, their personal circumstances, or both.

## Section 2: Your WorkLife Indicator

Your WorkLife Indicator profile is **Dual Focused Integrator** with **Low Boundary Control**.

### Brief Description of Your WorkLife Indicator Profile

#### BEHAVIORS

Integrator



You blend work and personal tasks and commitments. As an integrator, you do not maintain a clear line between your work and your personal life. You allow work to interrupt family or family to interrupt work or both, depending on your situation. You combine work and personal activities throughout the day, frequently transitioning between different roles. You may leave your cell phone on during business meetings so you can respond to a personal or family matter as it occurs, or you may frequently work during your personal time. You thrive on the mixing of boundaries.

#### IDENTITY

Dual Focused



You identify with and invest yourself in both your work and family. Although many other individuals may believe family and work are equally important, you act this way in how you allocate time and manage boundaries in your daily life. You experience periods when you sacrifice work time for family and family time for work demands. Over any given period of time, you usually balance the times that you have made work adjustments to attend to your family role, and vice versa.

#### CONTROL

Low Boundary Control



You frequently do not feel in control of how you divide your time and attention between work and family. You may be limited because of the type of work you do, your personal circumstances, or both. You may be frustrated at times because you would like more control over how you manage boundaries.

### YOUR PROFILE COMPARED TO OTHERS

Each of the WorkLife Indicator dimensions is described in the table below. The placement of the black diamond illustrates whether your score is low, mid, or high (as compared to a database of other individuals who have used this assessment). The column on the far right indicates what your score suggests about you.

	Dimension	Low	Mid	High	Your score suggests that:
Behaviors	<b>Family Interrupts Work</b> - Behaviors allow family responsibilities and relationships to interrupt your work life.			◆	Your family life interrupts your working hours.
	<b>Work Interrupts Family</b> - Behaviors allow work responsibilities and relationships to interrupt your personal life.			◆	Your work interrupts your family time.
Identity	<b>Work Focused</b> - Identify with and invest yourself in your work.		◆		You moderately identify with and invest yourself in your career.
	<b>Family Focused</b> - Identify with and invest yourself in your family.		◆		You moderately identify with and invest yourself in your family.
Control	<b>Boundary Control</b> - Feel in control of how you manage the boundaries between your work life and personal life.	◆			You do not feel in control of how you manage the boundary between your work life and personal life.

Approximately 50% of individuals in the database have a Mid score, while 25% have a High score and 25% have a score in the Low range. In the *Identity* and *Behaviors* factors, higher scores are not better scores; they indicate that an individual does more or has more of whatever the dimension measures. For example, a high score on the Work Focused dimension indicates that you more highly identify with your work role than average. It does not mean you are better (or worse) at performing your job. The only factor for which higher scores are likely to be better for you is *Boundary Control*. If you feel in control of how you manage the boundaries between work and family, then you are more likely to be able to manage the boundaries in a manner that feels good and is effective for you. A detailed description of your profile begins on the following page.

## Your Detailed Profile for Dual Focused Integrator

Your detailed profile is on the following pages. The description contains strengths and challenges associated with your profile as well as information about how others may see you and a list of tips to enhance your effectiveness based on your profile.

### Strengths

You mix work and the rest of life together, transitioning between the two throughout the day. You choose to work or tend to personal matters, depending on which is most needed at the time. You may also simultaneously work and tend to personal matters (for example, checking e-mails as you help your child do homework). You express yourself through both work and family roles, and you value both. Because of your dual focus, you may be more resilient and able to derive energy and satisfaction from whichever role is going well, even when things are not going as well in the other domain.

### Challenges

You may have very little time to relax because you are switching between roles and tasks. When something is going wrong in one role, the negative dynamics can bleed into the other role. Others may not know you are making trade-offs, such as meeting a deadline by working at home in the evening or leaving work early to attend a family function. You may be viewed as not fully committed to either role. Your constant accessibility may be confusing to others because it is hard to know what your priorities are.

### The Impact of Control

**Low Boundary Control** - You may experience blending as negative and stressful. You may not feel in control over shifting your attention and energy between work and family or nonwork activities. Work and personal-life demands habitually feel at odds. You may feel that you are constantly reacting to an external cue. You may feel pulled in different directions and constantly needed by others. The difficulty you experience adapting your boundaries makes it stressful meeting the needs of both work and family. You may feel like you are not very successful at managing either work or personal roles.

## How Others May See You

### *Positive Perceptions*

People may see you as highly effective and able to successfully manage work and family life simultaneously. You may be seen as someone who is available for people as needed. You may be seen as a dedicated spouse, parent, friend, and employee.

### *Negative Perceptions*

People may see you as reactive, always in a hurry and dealing with crises at work or at home. You may be exhausted and unavailable because you are always juggling and not able to fully invest in family or work when there is a heavy commitment. Constantly focusing on different tasks and not successfully completing them before moving on may make you less effective. You may overlook issues that you do not think are urgent but could be important to others. You may be perceived as not having the time to do anything in depth or plan for the future.

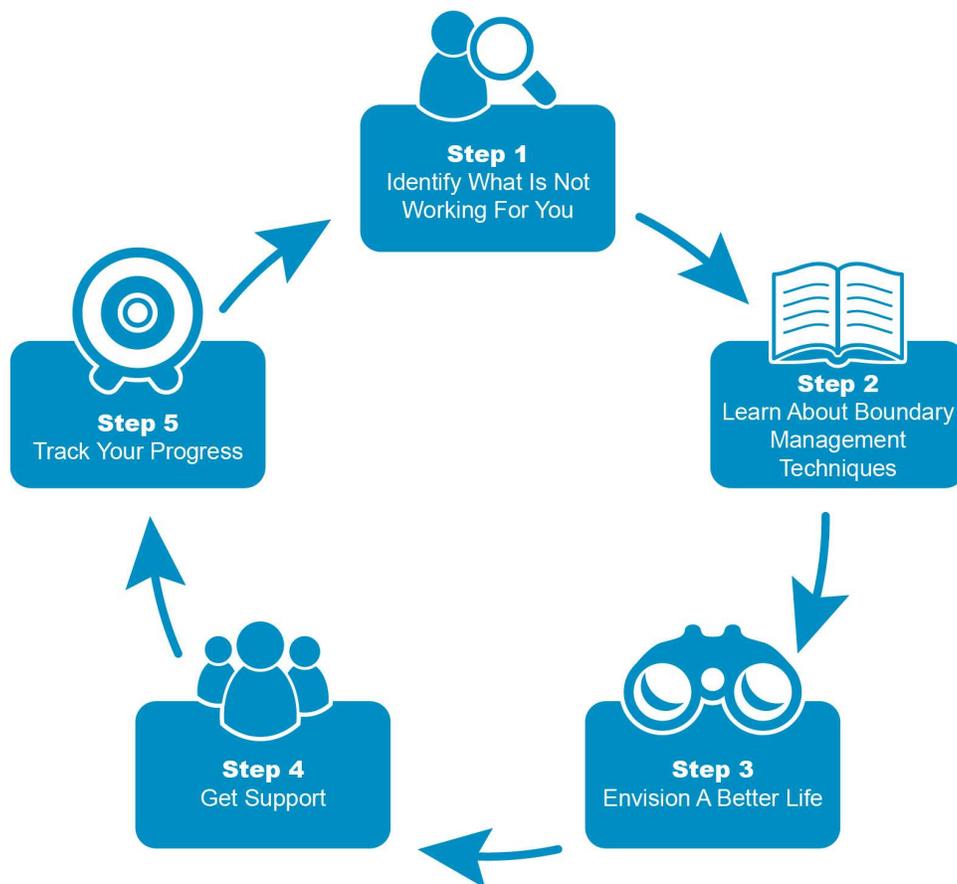
## Tips

- Strategically increase your visibility for high-value tasks. Take on a critical task at work that you are good at completing that others are not able to do. This will reassure your boss and coworkers about your dedication to your job. Let them know, especially for key work demands, that you will do what is needed to get the job done, including doing work at nontraditional hours.
- Use time triggers to ensure you end activities on time. For example, set a timer on your phone to go off ten minutes before you need to move to the next task.
- Limit interruptions so you are able to get things done quicker at work and then focus on family.
- Leverage technology to communicate your availability for either work or family so you can fully focus on the matter at hand. For example, if you work remotely, you might tell colleagues that you won't be online on Saturday because you are going to a sports event, but that you will be working on Sunday afternoon.
- Schedule time dedicated to your family. Set aside some time when work does not interrupt family or personal activities, so you can have meaningful, quality family time.
- Use transition rituals to help signal to yourself that it is time to move from one set of responsibilities to another. For example, you might listen to the radio in your car and not take a work call when you are commuting home, in order to manage your mood as you move from working to home.
- Set aside time for yourself. Set a time each day (or at least once a week) when you can focus on your needs, so you can rest and avoid burnout. It doesn't have to be long, just enough time to slow down and focus on you.

## Section 3: Development Planning Guide

### Increasing Your Effectiveness On and Off the Job

Knowing your WorkLife Indicator profile is the first step toward increasing your effectiveness and satisfaction, but it is what you do with this information that will make the biggest difference. The exercises in this section are organized into five steps. We recommend you complete the steps in order. You may find it helpful to revisit these steps, particularly if you have a change in job or family situation.





## Step 1: Identify What Is Not Working for You

The purpose of this section is to help you identify the things you want to change about the way you manage the boundaries between work and family. First you need to identify what aspect of boundary management is not working for you. Initially, it is a good idea to pay attention to what is happening in order to spot patterns in your behaviors. One way to do this is to monitor yourself, which helps you document how you spend your time and how you feel about it. On the following pages are several exercises to help you do this. You may already be aware of the patterns - but seeing the exact nature of them can be illuminating. This sort of accounting can help you pinpoint areas to change.

### Common Problem Areas

Difficulty managing the boundaries between work and family typically centers around one or more of the following four areas: Time Management, Boundary Permeability and Control, Managing Expectations Effectively, and Transitions between Roles. Each of these is described on the next pages. As you read the descriptions, think about which of these problem areas describe your situation.

#### Time Management



**Time Management** difficulties are about how much time you have to accomplish what you need to accomplish in any one sphere of life. The bottom line is that there are only 24 hours in a day. Often there is more to do than can be accomplished in the amount of time that is available. However, you can make choices about how you allocate your time between roles. You can regularly or sporadically change how you spend your time and how you manage the trade-offs associated with those choices. The important thing to remember is to make conscious choices and reflect on what matters most (and what you want to devote time to) and what you may need to cut back on (recognizing the consequences of reducing the amount of time you spend on it).

#### Boundary Permeability and Control



**Boundary Permeability and Control** may determine that you cannot focus on your personal time at night because you are getting too many calls from work. Alternatively, it may be that you can't focus at work because you keep getting calls from a caregiver in your home or from a friend or a relative. If you get too many interruptions, setting and enforcing limits might help. Alternatively, inviting more interruptions could make your life easier by allowing you to take care of things as a response is needed. Intentionally exercising the degree of Boundary Control you have may lead to a more effective lifestyle. For example, workers who telecommute can benefit from a demarcation between home and work roles so that everyone is signaled as to when work occurs. One way to do this is to have a separate office space at home that is only used for working. That way it is clear to you and others when you are "at work" and not open to being interrupted.

## Managing Expectations Effectively



**Managing Expectations Effectively** plays a big role in how satisfied we are with our boundary management strategies. Expectations can come from ourselves or those important to us. If you expect to focus on parenting or work the way your parents did, you may need to consider what this will mean for you in light of all the technological and social change that has happened between generations. Similarly, if you have family members or significant people at work who have expectations that may not be realistic, you may need to discuss your perspective with them in order to find a solution that is mutually beneficial. These types of conversations, whether in your family or work life, are often difficult. However, they can lead to positive changes. Your stakeholders may not be aware of how much stress you are experiencing and may be able to adjust their expectations or help you meet expectations in a new way. Stakeholders can often be the first to come up with strategies of substitution, delegation of responsibilities, changes in standards, or tips for reducing stress. The bottom line is that you must learn to communicate and manage expectations or you may feel like you have let yourself or others down.

## Transitions between Roles



**Transitions between Roles** can be another source of problems. Depending on your profile you may want stark transitions, or more gradual transitions. There are lots of ways to use transitions to your benefit. A transition ritual may help ease the transition of one role to another. For example, you can listen to upbeat or relaxing music during commuting time to gear up or unwind as you move from one role to another. You could try a change of clothes to signify that you are going to work or that you are at home. It can be difficult to switch from a more formal work-oriented communication style to a family style and vice versa. The things you do in one sphere of life may create problems in another sphere, and easing the transition may reduce these problems. If your main roles require very different behaviors, it may be important to focus on the transition between roles. Time buffers are also another way to manage transitions. Trying to squeeze in too many things at once can be problematic, in part because that interferes with your ability to effectively transition.

The following exercises target different aspects of these challenges and can be done as needed and in any order.



**Exercise 1: Tracking Your Time <sup>1</sup>**

There are 168 hours in one week. In the following table indicate the approximate numbers of hours you engage in the activities listed (the total should add up to 168). Use the blank spaces at the bottom of the chart to add additional activities.

The tracking task may be more difficult for Cyclers and Integrators – but we encourage you to do your best so you can get a better sense of how you are spending your time and how you feel about it. If you do multiple tasks at the same time (such as exercising while with your children), either pick the most prominent task or split the time between the two categories.

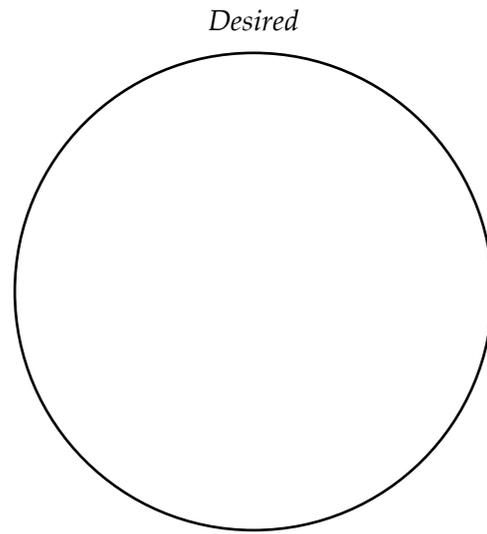
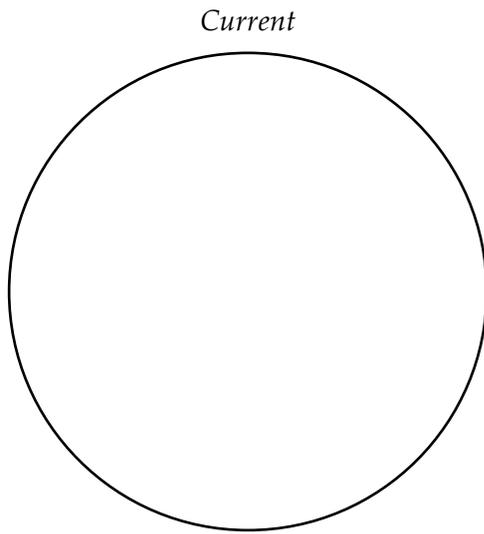
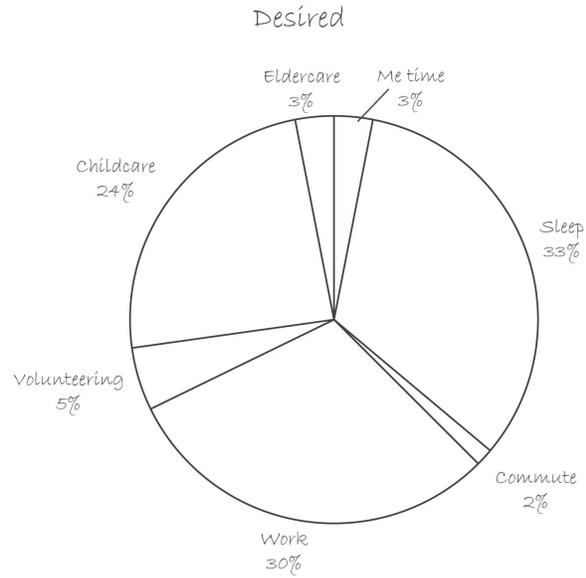
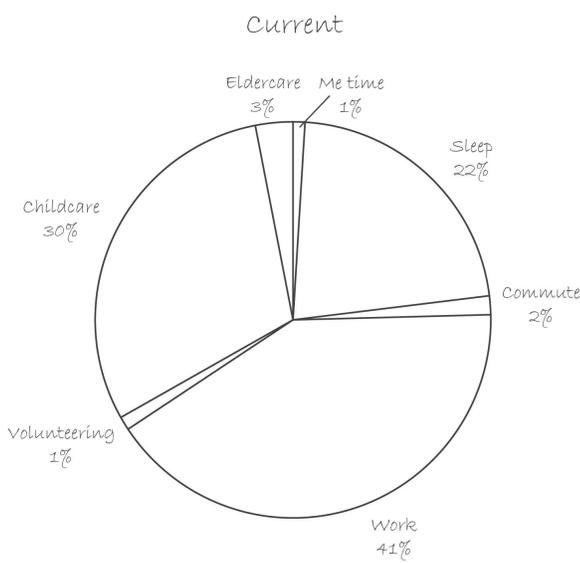
Activity	Number of Hours	Percentage of your total week's time
Childcare		
Cleaning		
Commuting		
Eating & Meal Preparation		
Eldercare		
Spending Time with Friends		
Hobbies		
Home or Yard Maintenance		
Leisure		
Shopping		
Spiritual Activities		
Volunteering		
Working		
Sleeping		
Exercising		
List other activities as desired:		
<b>Total</b>	<b>168 hours</b>	

<sup>1</sup> This exercise is adapted from *CEO of Me: Creating a Life That Works in the Flexible Job Age* by Ellen Kossek and Brenda A. Lautsch.



### Exercise 2: Identify Gaps in How You Spend Your Time<sup>2</sup>

Transfer the time percentages from the previous exercise to the “Current” circle at the bottom of this page to create a pie chart. Use the “Desired” circle to create a graphic representation of what you would prefer the percentages to be. (The examples below are intended to give you an idea of how to draw the graphs, not to suggest how you should distribute your percentages.)



What similarities and differences do you see between the two circles?

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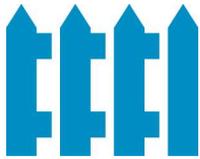
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Does the way you currently allocate time reflect how you would like to spend your time? If not, what changes could you make?

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<sup>2</sup> This exercise is adapted from *CEO of Me: Creating a Life That Works in the Flexible Job Age* by Ellen Kossek and Brenda A. Lautsch.



### Exercise 3: Identify Gaps in How You Manage Your Time<sup>3</sup>

What differences do you see between how you currently spend your time and how you would like to spend your time?

1 = Strongly agree 2 = Tend to agree 3 = Hard to decide 4 = Tend to disagree 5 = Strongly disagree

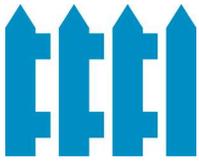
- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| • I can think of many times when I wished I were managing my work-family boundaries differently.   | 1 | 2 | 3 | 4 | 5 |
| • I am generally not happy with the way I manage my relationships between work and family roles.   | 1 | 2 | 3 | 4 | 5 |
| • I sometimes find that the way I manage the borders between work and personal life can prevent me from being effective in my work role.                     | 1 | 2 | 3 | 4 | 5 |
| • I sometimes find that the way I manage the borders between work and personal life can prevent me from being effective in my family or personal life roles. | 1 | 2 | 3 | 4 | 5 |
| • I sometimes find that the way I manage the borders between work and personal life can prevent me from devoting enough time to my outside interests.        | 1 | 2 | 3 | 4 | 5 |

### Interpreting Your Survey

If you circled mostly 1s or 2s, that indicates that you are probably not happy with the ways you are managing your boundaries. If you mainly circled 3s, that indicates that you are not sure if your approach is working for you or not. If you circled primarily 4s and 5s, that indicates that your approach is probably working well for you.

Regardless of your results, it may be helpful to reflect on what would make you feel more positive regarding work-life boundaries as well as what is working well already (so you can maintain good practice). For example, do you seek more separation between work and family roles so you can focus? If yes, then look toward increasing ways to have blocks of time to separate work and family. If you would like more integration between roles, explore ways to build more flexibility into your schedule, even for short blocks of time during the day or week when you know you might need it.

<sup>3</sup> This exercise is adapted from *CEO of Me: Creating a Life That Works in the Flexible Job Age* by Ellen Kossek and Brenda A. Lautsch.



**Exercise 4: Identify Connections between Your Values and How You Spend Your Time<sup>4</sup>**

Circle the five values that are most important to you in the list below. If there is a value important to you not listed, write it in the space provided.

Achievement	Courage	Justice
Action	Creativity	Knowledge
Advancement/Promotion	Economic Security	Location
Adventure	Expertise	Love
Aesthetics	Fame	Loyalty
Affiliation/Belonging	Family	Order
Affluence	Fellowship	Personal Development
Authority	Fitness	Recognition
Autonomy	Freedom	Responsibility
Balance	Friendship	Service/Helping Others
Challenge	Happiness	Spirituality
Change/Variety	Health	Status
Collaboration	Humor	Wisdom
Competence	Influence	Other:
Competition	Integrity	_____

Take a moment to describe each of the five values (what it looks like to you) and reflect on why these values are important to you.

Value	Description of the value and why it is important to you.

How are your values reflected in how you spend your time and manage your boundaries?

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Does how you spend your time and manage your boundaries conflict with any of your core values?

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<sup>4</sup>This exercise is adapted from the CCL Guidebook *Setting Priorities: Personal Values, Organizational Results* by Talula Cartwright.



### Exercise 5: Understand Your Stakeholders <sup>5</sup>

Respond to each statement below using the following response scale.

1 = Strongly agree 2 = Tend to agree 3 = Hard to decide 4 = Tend to disagree 5 = Strongly disagree

#### Family/Friend Satisfaction

- |   |   |   |   |   |   |
|---|---|---|---|---|---|
| • Reflecting over the last six months, I can think of many times that a member of my family or a close friend indicated that they wished I managed my work-family boundaries differently. | 1 | 2 | 3 | 4 | 5 |
| • Someone in my family or a close friend often expresses that they dislike the way I manage my boundaries between work and family roles.  | 1 | 2 | 3 | 4 | 5 |
| • Sometimes family members or a close friend will say that the way I manage the boundaries between work and personal life might prevent me from being effective in my family role.        | 1 | 2 | 3 | 4 | 5 |
| • My family believes I often let my work and my other personal interests intrude on family time in a negative way.  | 1 | 2 | 3 | 4 | 5 |

#### Boss and Coworker Satisfaction

- |  |   |   |   |   |   |
|--|---|---|---|---|---|
| • Reflecting over the last six months, I can think of many times that someone I worked with told me they wished I managed my work family boundaries differently. | 1 | 2 | 3 | 4 | 5 |
| • My boss sometimes lets me know that he or she is not happy with the way I manage my boundaries between work and family roles.                                  | 1 | 2 | 3 | 4 | 5 |
| • Coworkers sometimes tell me that the way I manage the boundaries between work and personal life might prevent me from being effective in my work role.         | 1 | 2 | 3 | 4 | 5 |
| • My boss believes I often let my family and personal interests get in the way of how I attend to my job.  | 1 | 2 | 3 | 4 | 5 |

<sup>5</sup> This exercise is adapted from *CEO of Me: Creating a Life That Works in the Flexible Job Age* by Ellen Kossek and Brenda A. Lautsch.

### **Interpreting Your Survey**

If you circled primarily 1s or 2s, that indicates that your stakeholders may not be happy with the ways you are managing your boundaries. If you mainly circled 3s, that indicates that you are not sure whether or not your approach is working for your stakeholders. If you circled primarily 4s and 5s, that indicates that your approach may be working well for your stakeholders.

Regardless of your results, it may be helpful to talk with your stakeholders about their perceptions and expectations to help you better understand where your approach is causing stress for others and where it is working well. Getting their input into how you manage work or family demands may lead to increased clarity and effectiveness. You can also discuss with a mentor or coach some possible ways to increase your work-life well-being by building stakeholder satisfaction.



## Step 2: Learn About Boundary Management Techniques <sup>6</sup>

Learning about different boundary management techniques increases the number of options you have for managing boundaries in ways that will work well in your situation.

### Exercise 6: Different Techniques for Managing Boundaries

Below is a list of tactics people use to create better alignment between their roles, responsibilities, and relationships. Check which tactics you are currently using.

#### *Using technology to manage boundaries*

- Using a mobile device to stay “in touch” with work or home
- Using a mobile device to separate work and home (having separate e-mails or text or IDs for different roles)

#### *Invoking triage based on values, needs, etc.*

- Having a system for determining what is to be worked on or responded to
- Focusing on a limited number of priorities

#### *Creating or managing physical boundaries*

- Only bringing home a certain type of work
- Checking personal e-mails or calling home once a day
- Keeping personal photos (or not) in your office
- Having separate keys, bags, computers, etc., for work and for home

#### *Controlling your time*

- Holding blocks of time to handle work or home needs as appropriate
- Setting aside time each day, week, or month for specific tasks

#### *Creating time and location for self-care*

- Having a place specifically for relaxing or personal time
- Spending time on enjoyable or relaxing activities

#### *Setting and managing expectations*

- Indicating your boundary management preferences to your boss, coworkers, family, etc.
- Communicating about your various obligations to significant people in your life so that others have an adequate understanding of your situation
- Providing feedback to stakeholders (for example, “When you call me at work I get distracted. Could you only call in cases of emergency?”)

<sup>6</sup> This list is adapted from "Balancing Borders and Bridges: Negotiating the work-home interface via boundary work tactics" in *Academy of Management Journal* by G. E. Kreiner, E. C. Hollensbe, & M. L. Sheep

*Negotiating your schedule with stakeholders*

- Agreeing to take certain roles or tasks at work in exchange for more flexibility
- Creating trade-offs with a partner (for example, “I will do the dishes if you do the cooking.”)

*Finding a role model*

- Identifying someone who manages his or her boundaries well and get advice

*Finding a substitute*

- Letting go of activities or tasks that do not reflect your needs or values. For example, if you do not enjoy housework, hire someone to do it if you can. If doing a task at work causes you stress, find someone who enjoys doing it or would otherwise benefit from taking it on.

*Better manage the transition between roles*

- Identifying rituals that help you go from one role to another; for example, listening to music, having a cup of coffee or a glass of wine, clearing your desk
- Changing your clothes so as to signify to yourself and others that you have changed roles
- Asking for some time to get organized before re-entering a role
- Leaving yourself a list of tasks as you leave a particular role

*Increasing fit by changing the time that you devote to a particular role*

- Finding a schedule that allows you to be more effective. For example, this may be asking to telecommute one day a week, switching to a part-time schedule, using your annual leave to address a personal interest or family issue, or asking a family member to take on a responsibility from your personal life.

Of the tactics you selected, which are most effective for you?

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What tactics would you like to try?

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You may want to discuss all or some of these tactics with various stakeholders in your life in order to help identify tactics that may work in your situation. You can also increase your options for tactics by asking others how they manage their boundaries in order to get more ideas. During the course of talking to others you may also better appreciate that different tactics work effectively for different people. You may want to review this list from time to time as aspects of work or your family change and during times of stress to prompt consideration of a broader range of options.



### Step 3: Envision a Better Life

Having a vision for your life is just as important as having a vision at work. Your vision should reflect what you want the boundaries between work and home life to be.

#### Excercise 7: Identify Your Goals

What are three things you want to change about how you manage your boundaries?

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Exercise 8: Identify Benefits and Trade-offs**

From the exercise on the previous page, transfer your goals into the left-hand column of the chart below. In order to commit to a change it is helpful to be honest about what you may have to give up and what you stand to gain. In some cases, pursuing a goal may require that you pick between competing values. For example, if you want to have a family dinner one night a week, then you may have to leave work earlier than you would like. You may feel like you are letting your boss or coworkers down by doing this. Or if you want to stop responding to e-mails on the weekend, you may feel that you are disappointing your colleagues. Making a change may require you to let go of routines or ways or thinking that you have grown accustomed to. Breaking a routine, even an ineffective one, can be difficult. Recognizing this tension before you have to face it will better enable you to think it through and make a well-deliberated choice.

Desired Change	Benefits	Trade-offs/Obstacles



## Step 4: Get Support

Everyone needs support to achieve goals, especially goals that have to do with how people manage the complex boundaries between work and family.

### *Identify types of support*

The type of support you want or need is just as important to consider as where to get support. Below is a list of the general types of support people tend to need when working on goals. You may want to consider a mix of all types of support or to focus on one or two types of support most important to you based on your situation and the goals you have set for yourself.

**Emotional Support** - Provides encouragement, validation, and empathy related to how you manage boundaries. For example, a friend who is in a similar situation as you who can listen and understand what you are experiencing.

**Cognitive Support** - Helps you increase your knowledge and wisdom about managing the boundaries between work and family. For example, a coach who is knowledgeable about various techniques for managing boundaries and can provide you with guidance or recommend various books or other resources.

**Political Support** - Helps you increase your access to organizational resources and opportunities related to how you manage boundaries. For example, a mentor at work can help you understand, and perhaps create more options for, how to manage your work.

**Physical Support** - Helps you maintain or improve your energy in order to better manage boundaries. For example, a personal trainer who can help you take care of yourself so you have the most energy possible and are better able to handle stress.

*Tips for handling stress associated with the boundaries between work and family*

- Pay attention to your response to stress. This allows you to take actions to reduce your stress before it becomes overwhelming.
- Separate what you cannot control from what you can control.
- Create a stress-busting ritual such as walking at a regular time, listening to relaxing music during commuting time, meditating, taking regular stretch breaks, etc. Have a support group to help you identify and work through times of stress. Connecting with others can help you put your situation in context and help you realize you are not alone and that your life is manageable - even enjoyable.
- Reduce draining activities as much as possible. If you can, hire someone to run errands, cook, or clean if that feels like a burden to you. Do you really need to do all the things you are doing? Perhaps you can trade time with someone who likes to do the things you do not and vice versa.
- Examine your interests, values, and priorities and act in a way that is in alignment with them.
- Look for the humor in situations. Keep a light heart. Find ways to incorporate laughter into every day.
- Focus on your health. Eat plenty of fruits, vegetables, lean protein, and whole grains. Avoid sugary, salty, and fatty foods. Exercise.
- Change your perspective. Spend time outside, see a movie, read a book. Focus on something different.
- Stop procrastinating. If an unfinished task, conversation, or project is the source of your stress, tackle it as soon as you can and move on.

**Exercise 9: Identify Sources of Support**

Using the table below, list people and activities that could offer you support in constructing a more satisfying way of bringing work and the rest of life together.

	Name	What kind of help do you want?
Family Members		
Boss		
Colleagues		
Friends		
Mentor or Coach		
Seminars/Classes		
Publications about specific topics		
Other (specify)		

**Exercise 10: Benefits for Stakeholders**

Review the goal(s) you set in Exercise 7 from the perspective of different stakeholders in your life. In the table below list the benefits they might gain if you are able to achieve your goal. You may find that making subtle changes to your goal may enable you to benefit others and thereby increase their support of your goal.

	How will the change potentially benefit them?
Family Members	
Boss	
Colleagues	
Friends	
Mentor or Coach	
Other (specify)	

If you think your stakeholders are not satisfied with the way you are managing your work-life boundaries, then you may want to find out more about the sources of greatest conflicts or disappointment.

If you think your stakeholders are satisfied with the current situation, then a change may be less welcome, and you may need to do some reassuring and articulate your desire to make a change in a manner that makes the benefit to them clear.



**Step 5: Track Your Progress**

In order to make effective changes in how you manage your life, you need to be intentional about the choices you make and aware of the impact of those choices. Tracking your progress is one way to do that.

**Exercise 11: Check-in Worksheet**

Use the following worksheet to record your progress toward your goals. Write the goal statement on the appropriate line above each table. Indicate a specific date for checking in. In the first column identify the people you will check with. In the second column list questions you want to include in your check-in. Suggested questions are: What is working well? What is not working well? Use columns three and four to document the themes and next steps resulting from your check-in process, so you can refer back to it to keep the momentum going.

Goal 1: \_\_\_\_\_

Check-in Date: \_\_\_\_\_

Get Feedback From	Questions to Ask	Themes	Next Steps

Goal 2: \_\_\_\_\_

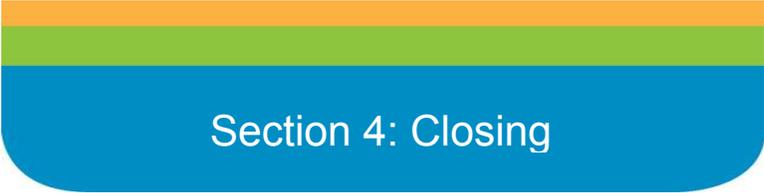
Check-in Date: \_\_\_\_\_

Get Feedback From	Questions to Ask	Themes	Next Steps

Goal 3: \_\_\_\_\_

Check-in Date: \_\_\_\_\_

Get Feedback From	Questions to Ask	Themes	Next Steps



## Section 4: Closing

We encourage you to revisit the five steps in the Development Planning Guide section of the report and to access the resources list below as needed. As circumstances change at work or at home, you may need to manage boundaries in different ways in order to be effective. Revisiting the steps over time can help you hone an approach that will work well for you.

### Additional Resources

Below is a list of additional resources to help you learn more about and make changes related to aspects of your WorkLife Indicator profile. These and other titles are available at [www.ccl.org](http://www.ccl.org).

*Building Resiliency: How to Thrive in Times of Change* (2001), Mary Lynn Pulley and Michael Wakefield

*CEO of Me: Creating a Life That Works in the Flexible Job Age* (2008), Ellen Ernst Kossek and Brenda A. Lautsch

*Finding Your Balance* (2004), Joan Gurvis and Gordon Patterson

*Learning from Life: Turning Life's Lessons into Leadership Experience* (2000), Marian N. Ruderman and Patricia J. Ohlott

*Managing Leadership Stress* (2008), Vidula Bal, Michael Campbell, and Sharon McDowell-Larsen

*The Power of Full Engagement: Managing Energy, Not Time Is the Key to High Performance and Personal Renewal* (2004), Jim Loehr and Tony Schwartz