Team Conversation Guide

Tackle Team Overwhelm Together

Goal

Combat overwhelm by deciding on new ways to manage some of the items on your list.

Why

Overwhelmed teams rarely take time to step back and look at the whole picture. They're often so busy running from task to task that they don't stop to question what they're doing. In the absence of regular, rigorous discussions about priorities, it's easy for duplication, overly complex, and low value tasks to creep in and for team members to make assumptions about how they should respond to new requests.

Approach

As a team, visualize all the things demanding your time and attention. When you can all see the same "picture" of your challenge, discuss what you see. Try to identify patterns, eliminate unnecessary friction, and narrow your near-term focus on the most high-value activities.

This guide outlines a five-step process with discussion questions for each step. This process is a best-practice suggestion, but feel free to adapt it to suit your group's specific needs.

Materials

You can use anything that makes it easy for your group to add and edit items to a shared list.

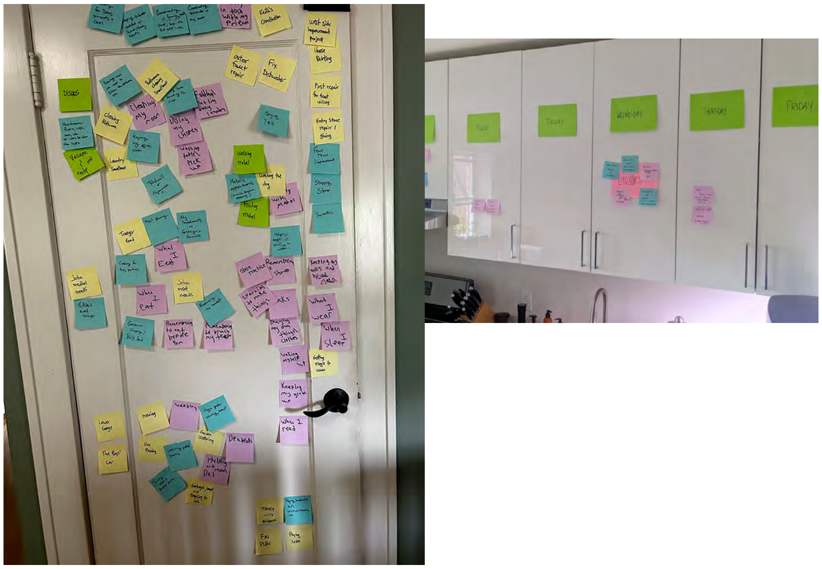
Options for Online Meetings

- Shared doc or canvas: Use an online document everyone can edit or the whiteboard feature built into your existing collaboration tools.
- Miro: Copy this Miro template into your team's workspace.
- Pre-meeting audits: Ask team members to inventory their work list before the meeting, then create a combined list together.

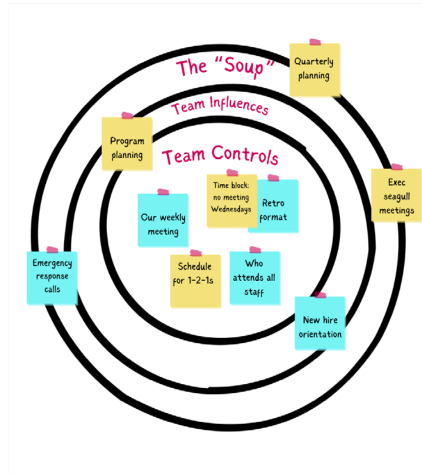
Options for In-Person Meetings

- Sticky notes and pens: write items on individual sticky notes and post them on a wall
- Whiteboard: write items

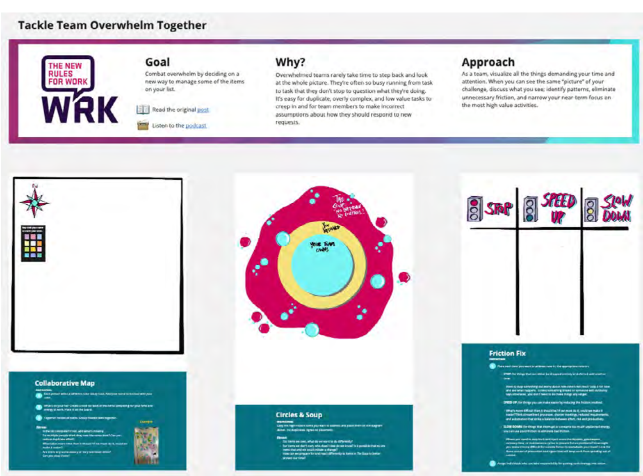
Sticky notes are easy to add and move around throughout the discussion.



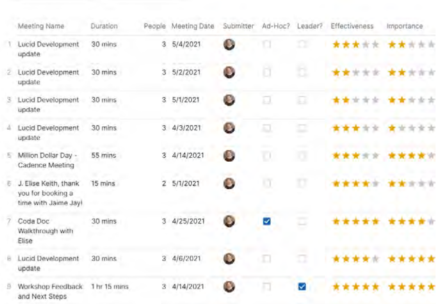
Simple grids and circles make it easier to organize ideas.



Using a whiteboard template (like this Miro board) means you can start, stop, and come back to your conversation as needed.



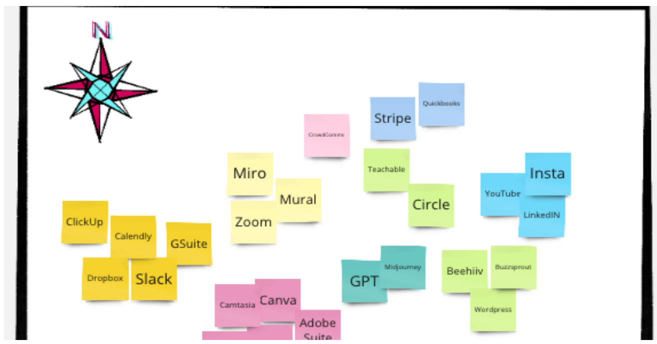
Allergic to sticky notes?
Try a collaborative spreadsheet.



	Meeting Name	Duration	People	Meeting Date	Submitter	Ad-Hoc?	Leader?	Effectiveness	Importance
1	Lucid Development update	30 mins	3	5/4/2021		☐	☐	★★★☆☆	★★☆☆☆
2	Lucid Development update	30 mins	3	5/2/2021		☐	☐	★★☆☆☆	★★☆☆☆
3	Lucid Development update	30 mins	3	5/1/2021		☐	☐	★★☆☆☆	★★☆☆☆
4	Lucid Development update	30 mins	3	4/3/2021		☐	☐	★★★☆☆	★☆☆☆☆
5	Million Dollar Day - Cadence Meeting	55 mins	3	4/14/2021		☐	☐	★★★☆☆	★★★★☆
6	J. Elise Keith, thank you for booking a time with Jaime Jay!	15 mins	2	5/1/2021		☐	☐	★★★★☆	★★☆☆☆
7	Coda Doc Walkthrough with Elise	30 mins	3	4/25/2021		☑	☐	★★★★★	★★★★☆
8	Lucid Development update	30 mins	3	4/6/2021		☐	☐	★★★★☆	★★★★★
9	Workshop Feedback and Next Steps	1 hr 15 mins	3	4/14/2021		☐	☑	★★★★★	★★★★★

Process

Part 1: Visualize to Stabilize
Technique: Collaborative Map



A: Build the Map

Get whatever might be overwhelming your team out of your heads and down where everyone can look at it together. This converts intangible anxieties into actionable items, creating emotional distance and immediate relief.

Possible Starting Questions:

- What tasks are on each of our lists?
- Which planned and ad-hoc meetings are we attending each month?
- Which collaboration tools are we using?
- What are both the big and small things taking our attention and focus?

B: Find the Patterns

Look closely at your list and call out any patterns. Identify any duplicated effort, inefficiencies, and items that you're carrying along out of habit rather than because they add value. Also highlight any important items that feel especially burdensome.

Questions You Might Discuss:

- Is the list complete? If not, what's missing?
- What are the top priorities? Which items are critical to our success?
- Is there anything here that surprises you?
- Which of these do we find enjoyable?
- Do multiple people think they own the same item? Can we reduce duplicate effort?
- What's more difficult than it should be? If we must do it, could we make it easier?
- Are there any unnecessary or very low value items? Can we stop those?

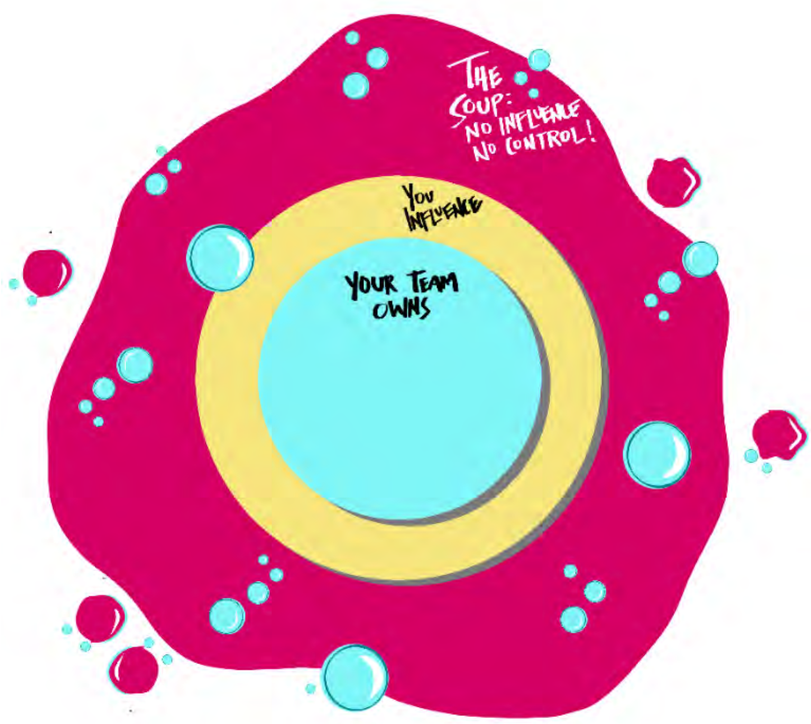
Part 2: Claim Your Agency
Technique: Circles and Soup

Does your team own everything on your map? Skip to Part 3.

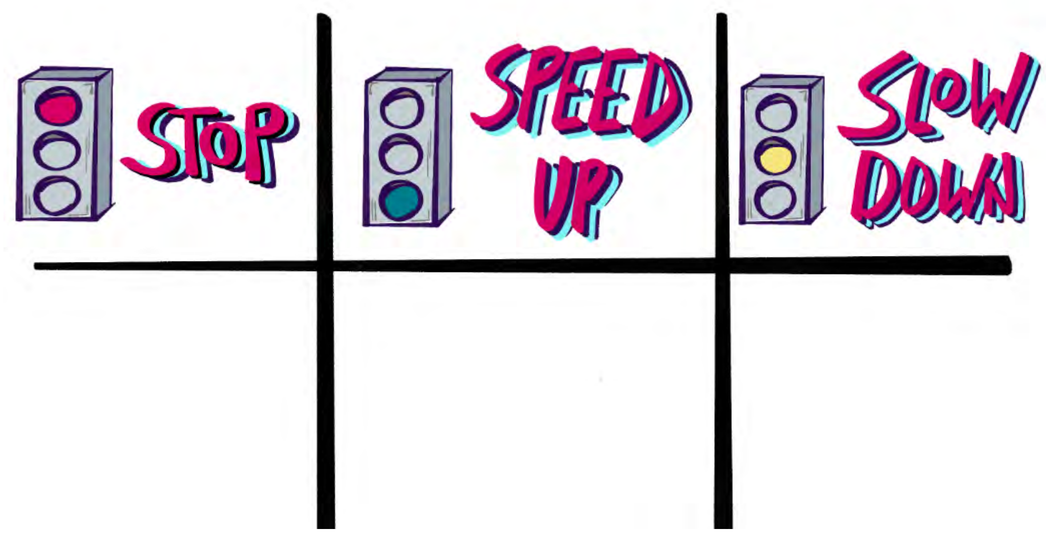
Identify what you can control directly and what you can't. Remember: you always have more agency than it seems at first glance. Breaking large items down into smaller components may reveal even more opportunities for your group to gain control over your time and energy.

Questions You Might Discuss:

- What do we own?
- If we don't own something, who does? What do they consider important?
- What can we influence?
- What impacts us that's outside of our control and influence?



Part 3: Define Your Experiments
Technique: Stop, Speed Up, Slow Down



A. Decide What You'll Do

Decide the strategy you'll use to reduce overwhelm. You may find some items you can eliminate or defer entirely, and others that require a new approach. For smaller items, decide how you'll change your approach and consider this a final decision. Done feels so good!

We suggest these solution categories.

- **STOP:** for things that can either be dropped entirely or deferred until another time.

  Want to stop something but worry about how others will react? Stop it for now and see what happens. Unless something breaks or someone with authority says otherwise, you don't need to do these things any longer.

- **SPEED UP:** for things you can make easier by reducing the friction involved.

  What's more difficult than it should be? If we must do it, could we make it easier? Think streamlined processes, shorter meetings, reduced requirements, and automation that strike a balance between effort, risk and productivity.

- **SLOW DOWN:** for things that interrupt or consume too much unplanned energy, you can use good friction to eliminate bad friction.

  Where do you need to step back and inject more checkpoints, gatekeepers, recovery time, or maintenance cycles to prevent future problems? How might you make it more difficult for outside forces to overwhelm your team? Look for those ounces of prevention and rigor that will keep work from spiraling out of control.

Larger changes should be considered experiments. We recommend identifying no more than two or three larger experiments to try. Set a near-term review date where you can evaluate and adjust your results, then select a new set of experiments to try next.

B. Confirm Next Steps and Appreciate Progress

Finally, review all the decisions and next steps to ensure everyone understands what should happen next. Then, take a beat to appreciate what you've done.

Confirm:

- What did we decide?
- Who will do what by when?
- When will we check back on how our strategies worked?
- Who and what in this conversation deserves our appreciation?

Additional Resources

This guide pulls together insights from a our 2023 series focused on combating overwhelm at work. Follow the links for detailed technique guides, expert interviews, and a video walk through of this process.

- Overwhelmed at Work
- MVC: Create a Collaborative Team Map
- MVC: Circles and Soup with Diana Larsen
- Overcoming Overwhelm at Work with Bob Sutton & Rebecca Hinds
- Tackling Team Overwhelm Together: Conversation Guide Walk Through and Tips

Unleashing the teams & leaders of the future by turning insights into action.

At the New Rules for Work Labs, we connect with the front runners who are out there mapping the uncharted waters of work, and share their insights with you.

We then seek the simplest possible ways to put these insights into practice.

The New Rules for Work project is hosted by Elise Keith and Dave Mastronardi.

We encourage you to share this guide with your colleagues and friends, and invite them to become a subscriber

Join us at: labs.newrulesforwork.com

Comments, questions, feedback? Get in touch. Let's experiment!

- Dave & Elise