Workload distribution analysis guide

## Overview

This guide helps managers and team leads assess how work is distributed across a team. It's designed to identify overload, underutilization, role misalignment, and hidden burnout risks - so work can be more fairly and sustainably structured.

#### When to use it

* Quarterly check-ins or planning sessions
* After a reorganization, team growth, or staff turnover
* When workload stress or performance concerns arise
* Before launching major projects or initiatives

#### How to use it

Work through each section with your own data or input from your team. Use the sample tables and prompts to spot imbalances and decide on next steps. Ideally, complete this collaboratively and follow up in 1:1s or team meetings.

## Section 1: Gather data on responsibilities and active work

Instructions: List each team member, their key responsibilities, and all active or upcoming work items, including both project work and ongoing duties.

| **Team member** | **Core responsibilities** | **Active projects/tasks** | **Time-sensitive? (Y/N)** | **Estimated hours/week** |
| --- | --- | --- | --- | --- |
| Alex | Client comms, reporting | Q2 reporting dashboard, monthly summaries | Yes | 30 hrs |
| Jamie | Internal ops, finance | Budget reconciliation, policy update | Yes | 35 hrs |
| Taylor | Marketing, social media | Product campaign support | No | 15 hrs |

Include BAU tasks, admin, and hidden work (e.g. team support, meetings).

## Section 2: Assess workload balance

Instructions: Use these prompts to identify imbalances or risks in the table above.

* Are any individuals regularly exceeding 40 hours/week?
* Who is doing the majority of urgent/reactive work?
* Who owns the highest-stakes or most visible projects?
* Are any team members underutilized or light on responsibilities?
* Are core responsibilities or team goals overly reliant on one person?

Optional scoring matrix (to visualize load):

| **Team member** | **Estimated workload (L/M/H)** | **Variety of tasks** | **Urgency level** | **Risk of overload** |
| --- | --- | --- | --- | --- |
| Alex | High | Low | High | 🚩 High |
| Jamie | Medium | High | Medium | Moderate |
| Taylor | Low | Medium | Low | Low |

## Section 3: Analyze alignment

Instructions: Assess whether each person’s current workload aligns with their skills, strengths, and development goals.

Prompts:

* Are high performers getting stretched too far or pigeonholed into firefighting roles?
* Are junior team members given opportunities for growth?
* Are tasks matched to role expectations and job descriptions?
* Is there a good mix of strategic vs. tactical work across the team?

Optional table:

| **Team member** | **Alignment with role (Y/N)** | **Development aligned?** | **Notes/actions** |
| --- | --- | --- | --- |
| Alex | N | N | Needs delegation of reporting tasks to free up strategic time |
| Jamie | Y | Y | Good fit and variety |
| Taylor | Y | N | Consider stretch opportunities in campaign strategy |

## Section 4: Spot burnout flags

Instructions: Based on all data, reflect on signs of strain.

* Who has expressed stress or exhaustion?
* Are there recent dips in performance, errors, or absenteeism?
* Has anyone started “quiet quitting” (pulling back from non-essential effort)?
* Are specific roles experiencing persistent turnover?

Document these in a table:

| **Team member** | **Observed burnout flags** | **Notes** |
| --- | --- | --- |
| Alex | Working overtime, seems withdrawn | Follow-up in 1:1 |
| Jamie | N/A | - |
| Taylor | Mild frustration with limited challenge | Discuss career path |

## Section 5: Create rebalancing actions

Instructions: Based on your analysis, identify specific actions to redistribute or reshape work in a more sustainable way.

Prompts:

* What can be delegated, paused, or reassigned?
* Who might benefit from support, cross-training, or more variety?
* Can any recurring tasks be automated or simplified?
* Do we need more clarity on roles or resource needs?

Action plan table:

| **Action** | **Owner** | **Timeline** | **Check-in date** |
| --- | --- | --- | --- |
| Shift reporting tasks from Alex to Taylor | Manager | 2 weeks | Monthly review |
| Automate internal meeting scheduling | Ops lead | 1 month | Quarterly ops sync |
| Set clearer priorities for Q3 campaign work | Marketing lead | 1 week | Team stand-up |

## Smart Shortcuts Instead of asking people to manually record hours or tasks, you can layer in tools that automatically collect data to estimate workload and utilization.

* **Microsoft Viva Insights / Workplace Analytics / Google Time insights in GCal.** Tracks collaboration time, meeting overload, focus time etc..
* **Project Management tools** (i.e. Asana, Jira, ClickUp, or Monday.com) these tools often have workload views built-in. Instead of manually building tables, you can see real-time assignments across projects and who’s over capacity and/or spot under-utilization quickly.