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.