

Workload discussion template

Overview

This template helps structure open, honest conversations between managers and employees when workload feels unmanageable, priorities need to shift, or burnout risks are emerging.

Prioritizing workload isn't a sign of weakness, it's a healthy, proactive practice that supports performance, prevents overload, and encourages trust between employees and managers.

When to use it

- When an employee raises concerns about excessive workload, pressure, or unclear priorities
- As a follow-up to a burnout check-in conversation
- During regular 1:1s, especially in high-pressure seasons
- In response to warning signs like missed deadlines, working late, or withdrawal
- During quarterly planning or role reviews

Discussion structure

1. Open the space

Start by setting the tone: respectful, open, and problem-solving.

"I appreciate you raising this. Let's take some time to walk through what's on your plate and what adjustments could help you do your best work without hitting burnout."

2. Review current workload and energy

Prompting questions:

- “What are your top priorities right now?” (and do they match their core work or the department’s north star?)
- “What’s taking up the most time or mental load?”
- “Are there tasks that feel especially overwhelming, repetitive, or unclear?”
- “What kinds of work feel energizing or meaningful right now?”
- “What does a typical week look like for you in terms of hours, meetings, and output?”
- “Is there anything you do as a legacy process that you know has no impact? Can we change/remove this?”

A common way to manage workload is with the Eisenhower Matrix, which allows you to:

- Clarify what deserves your employee’s attention
- Prevent overwhelm by organizing work into four categories
- Improve long-term productivity
- Reduce stress and reactive work
- Align your employee’s time with goals and values

	Urgent	Not urgent
Important	High priority tasks	High value but to do later
Not important	Lower priority tasks	Low priority and low urgency

To use the table, you could take, for example, reporting dashboards as a task:

Reporting dashboards → Are they used? → Yes, by main stakeholder → Then they’re high priority → But cadence of work can be changed to once every two weeks instead

3. Identify pain points and blockers

Ask direct but empathetic questions to pinpoint where adjustments may be needed.

Prompts:

- “Which tasks are creating the most pressure right now?”
- “Are there any upcoming deadlines that feel unmanageable?”
“Do you feel you have enough control over your time and how it’s used?”
- “Are there meetings or routines that aren’t serving a clear purpose?”

4. Co-design possible solutions

This is the core of the negotiation. You’re looking for flexibility and trade-offs – not just taking work away.

Levers to explore:

- Task reallocation or delegation
- Extending or resetting deadlines
- Reducing scope or frequency of certain tasks
- Shifting meeting loads or communication expectations
- Adding support (resources, tools, other people)
- Clarifying priorities or expectations
- Exploring time-off or recovery options

Prompting questions:

- “What could we remove, reduce, or delay to create space?”
- “Are there things on your plate that don’t need to be yours?”
- “What support would make the biggest difference right now?”

5. Clarify next steps and mutual commitments

Capture agreed changes, expectations, and timelines for follow-up.

Action plan table:

Change or adjustment	Owner	Support needed	Review date
Pause reporting dashboard	Manager	Confirm with data team	2-week check-in
Delegate admin tasks	Employee	Identify handover buddy	1-week check-in
Clarify client project scope	Manager	Align with stakeholder	End of sprint

Discussion summary section (optional)

Key discussion points	Notes
Top sources of overload	e.g. admin and data work taking too much time
Energizing tasks to focus on	e.g. strategy, creative work
Adjustments agreed	e.g. reduce admin, refocus priorities
Manager commitments	e.g. review in 2 weeks, confirm timeline shifts
Follow-up plan	e.g. check-in after next sprint

Final tips for managers

- **Approach with empathy, not defensiveness** – If an employee raises workload concerns, thank them. It takes courage.

- **Don't promise what you can't deliver** – Be honest about business constraints, but creative about compromises.
- **Document and follow up** – Even if it's informal, noting what you discussed builds trust and accountability.
- **Don't wait for a crisis** – Normalize these conversations before people burn out.