

Overwhelm Operating Scan

A simple tool for seeing what is actually driving your workload



Introduction

Overload is often a sign of missing boundaries and missing clarity. It is not a personal failure. When you feel overwhelmed, it usually means something in your work system needs attention—not that you need to work harder or faster.

This scan helps you see the pattern of your work so you can make better decisions about what to keep, what to stop, and what to delegate. Think of it as turning on the lights in a crowded room. Once you can see what you are carrying, you can decide what actually belongs to you.

The goal is not to do everything better. The goal is to do less of what does not serve you, your team, or your actual role. This tool will walk you through a simple process to identify the sources of your workload, spot the patterns creating overload, and choose one or two small changes that will give you meaningful relief.

You do not need to solve everything at once. Even recognizing one pattern or releasing one obligation can shift how your week feels. Start where you are, be honest about what you see, and trust that small adjustments create real change over time.



What you will do:

- List what you are carrying
- Identify where it comes from
- Spot energy leaks
- Decide what is essential
- Release one or two items
- Create a protective rule

Section 1: What You Are Carrying

List the tasks, responsibilities, and obligations you are holding right now. Include both formal duties and the invisible work you picked up along the way. This is not your job description—this is the real inventory of what fills your days and occupies your mental space.

Many professionals carry two workloads: the official one that appears in their role description, and the hidden one made up of unplanned support, quick fixes, emotional labor, project rescue missions, and instant responses. Both are real work, but only one shows up in performance reviews or capacity planning.

Be specific and thorough. Include everything from leading strategic initiatives to responding to Slack messages within minutes, from formal approvals to being the person everyone comes to when they need help. Write down the work that has deadlines and the work that just shows up. Capture the projects you volunteered for and the ones that somehow became yours without you noticing.

Do not judge what you write. Do not edit yourself. Just get it all visible. You might be surprised by how long the list gets, or by seeing patterns you had not noticed before. That is exactly the point—you cannot manage what you cannot see.

Examples of visible work

- Leading the quarterly planning process
- Managing the budget for your department
- Presenting at the monthly leadership meeting
- Reviewing and approving vendor contracts

Examples of invisible work

- Responding to urgent requests within minutes
- Smoothing conflicts between team members
- Rescuing projects that are falling behind
- Answering questions that could go to someone else
- Checking email constantly to stay responsive

My list:

[Space for your written inventory]

Section 2: Where the Work Comes From

Now that you have your list, it is time to understand where each piece of work originated. Mark each item with the source of the work. Choose one category for each task or responsibility. This step reveals patterns you might not have noticed—like how much work you are doing that technically belongs to someone else, or how many obligations come from trying to keep everyone happy.

Understanding the source helps you see what is negotiable. Work that comes from your actual job description usually stays. Work that comes from habit, self-imposed expectations, or conflict avoidance often has room for change. Work that technically belongs to someone else is almost always negotiable, even if it feels urgent or important.

Be honest as you categorize. If you took on a responsibility because you worried someone would be upset if you said no, that is different from work that was formally assigned to you. If you are doing something because it has always been done this way and no one questioned it, that is a pattern worth noticing. The goal is not to judge yourself, but to see clearly so you can make different choices going forward.



My actual job

Responsibilities formally assigned to your role



Someone else's job

Work that technically belongs to another person or team



Self-imposed expectation

Standards or obligations you created for yourself



Unclear request

Tasks where the scope, ownership, or priority was never defined



Habit or pattern

Work you do automatically because it has always been done



Keeping people happy

Tasks driven by wanting to please or accommodate others



Section 3: Energy Leaks

Energy leaks are the small, persistent drains that add up to exhaustion. They are the interruptions, the instant responses, the context switching, and the emotional labor that happens in the margins of your day. These patterns tell you something is out of balance, even if each individual instance seems minor.

Check any statements below that apply to your current work pattern. Do not overthink it—if something resonates, mark it. The goal is to notice what is happening, not to fix it all at once. Even one or two energy leaks can create significant fatigue over time, especially when they repeat daily or hourly.

- **I answer too quickly or feel pressure to respond instantly.** You feel anxious when messages sit unanswered, even for an hour. You interrupt your focused work to reply immediately, believing that speed equals professionalism.
- **I am interrupted so often that I lose track of what I was doing.** Your attention is fractured throughout the day. You rarely get more than twenty minutes of uninterrupted time, and you forget what you were working on before the interruption.
- **I switch contexts many times a day.** You move between completely different types of work without transition—strategic planning, then tactical execution, then emotional support, then approvals. Each shift costs energy you do not realize you are spending.
- **I take on work to prevent someone else from being upset.** You say yes when you want to say no, because you worry about how the other person will react. You prioritize their comfort over your capacity.
- **I agree to things I do not have time for.** You commit in the moment, hoping you will find time later. Your calendar is already full, but you keep adding more because saying no feels impossible.
- **I have tasks no one else knows I am doing.** You carry invisible work that would surprise your manager or colleagues. If you were suddenly unavailable, critical things would slip through the cracks because only you know they exist.

The items you checked are not character flaws—they are symptoms of a system that needs adjustment. Energy leaks point you toward the boundaries you need. If you checked multiple items, that is common. Focus on the one or two that feel most draining, and use them as guides for the changes you will make in the next sections.

Section 4: What Is Actually Essential

This is the most clarifying step in the entire scan. Go back to your list from Section 1 and circle the items that are truly required for your role. Ask yourself: If I stopped doing this, would my core responsibilities fail? Would my team be unable to function? Is this explicitly part of my job description or a non-negotiable priority from leadership?



Essential does not mean important. It means required. Many things feel important—and they might be—but they are not essential to your specific role. Someone else could do them. They could be done differently. They could wait. Or they might not need to be done at all.

This distinction is difficult because we are trained to see all work as equally urgent and to believe that caring means carrying. But when everything is essential, nothing is. Real priorities require protecting the work that matters most and letting go of the rest, even when it feels uncomfortable.

Everything you did not circle is optional, negotiable, or transferable. That does not mean it is worthless—it means it can be handled differently. It might belong to someone else. It might be a nice-to-have rather than a must-have. It might be something you can delegate, automate, or simply stop doing without significant consequence.

What is essential:

Work that is formally required by your role, non-negotiable priorities from leadership, and core responsibilities that only you can fulfill. These stay.

[Space for your written list]

What is not essential:

Everything else. Work that could be delegated, stopped, renegotiated, or done by someone else. These are your opportunities for change.

[Space for your written list]

If your essential list is still overwhelming, you have a workload problem, not a personal capacity problem. That information is valuable—it tells you that you need support, prioritization from leadership

Section 5: What You Will Stop Carrying

Now comes the hard part and the liberating part. Choose one or two items from your "not essential" list that you can stop doing, delegate, or renegotiate this week. Do not choose more than two. This is not about creating a massive overhaul—it is about taking one concrete step that creates immediate relief.

Small steps work better than big plans. When you try to fix everything at once, you usually fix nothing because the effort itself becomes overwhelming. But when you release just one or two obligations, you create space. You prove to yourself that change is possible. You build momentum for the next small step.

As you choose what to release, look for quick wins. What would give you the most relief with the least political complexity? What could you stop doing tomorrow without needing extensive coordination? What have you been carrying out of habit, where no one would actually notice or mind if it stopped?

01

Identify candidates

Look at your "not essential" list and highlight items that feel draining, time-consuming, or outside your core role.

02

Assess impact

For each candidate, ask: What would actually happen if I stopped? Usually, the answer is less dramatic than you fear.

03

Choose your two

Pick one or two items where you can take action this week. Favor simplicity over perfection.

04

Decide your method

Will you stop completely, delegate to someone else, or renegotiate the scope or timeline? Be specific.

05

Communicate clearly

Let affected people know what is changing and why, if needed. Brief and direct works best.

The two items I am releasing:

[Space for your written commitment]

Write down exactly what you will stop and how you will make it happen. Specificity increases follow-through. "I will stop responding to non-urgent Slack messages after 6pm, starting Monday" is stronger than "I will create better boundaries." Name the action. Set the date. Then do it.

Section 6: The Rule That Protects You

The final step is to create one simple rule to reduce overwhelm going forward. This rule acts as a filter for new requests, a boundary for your time, and a reminder of what you've learned. It should be clear, specific, and something you can actually follow without needing perfect conditions.

Boundary rules

- I will not commit on the spot
- I will check email twice daily, not constantly
- I will not work past 6pm unless truly urgent

Ownership rules

- I will not hold work that belongs to someone else
- I will redirect unclear requests to the appropriate owner
- I will ask "whose job is this?" before saying yes

Clarity rules

- I will batch messages twice a day
- I will block and protect focus time
- I will share my workload with my manager monthly

My rule:

[Space for your written rule]

What Happens Next

Identifying what creates overload gives you room to act. You can set clearer limits, delegate with confidence, and make choices based on what matters. Making these patterns visible is the first step toward change.

This scan is not a one-time exercise. Work changes, requests accumulate, and boundaries drift. Return to this tool whenever overwhelm resurfaces. Each time, you'll get faster at recognizing patterns and more skilled at protecting your capacity. You are building a practice, not solving a problem forever.

If you want help making sense of your results or creating a clearer workload plan, reach out anytime. Sometimes an outside perspective helps you see what you are too close to notice, or gives you permission to make changes you already know you need.