

WORK-LIFE BALANCE WORKBOOK

*The key to empowering
your team and projects*

A PRACTICAL WORKBOOK WITH
10 EXERCISES
ON HOW TO IMPLEMENT
WORK-LIFE BALANCE
PRINCIPLES IN YOUR OWN LIFE
AND YOUR PROJECT TEAM



44 PAGES

I have never encountered a health and wellbeing chapter in any of the business books I have read. There is no obvious link between personal wellbeing and the business of project management, and so it is unlikely that you will find 'looking after yourself' on a check list of priorities for successful project management. I believe, however, that the way you treat yourself has a tremendous impact on the way you deliver work, manage projects, and communicate with people.

In November 2013, I started managing two big European projects. Months before, I had written these project applications with my colleague. At the time, I felt very eager to start the actual project management work. And I wanted to do it right. I wanted it to be perfect. For nearly three months, I spent ten to twelve hours a day preparing project management handbooks, planning kick-off meetings, and producing project documentation. I did not sleep well during these months. I did not care what I was eating (mostly pizza in my office) and I did not give myself time or space to relax at all. Consequently, I became short-tempered and difficult to work and live with. I was also not enjoying my work as much as I could have.

When, finally, both project kick-off meetings were over, and everything was on track, I felt exhausted, drained, and unmotivated. Still, it did not feel right for me to relax. The next couple of months passed. I worked as hard as before, spending long hours at my desk and pushing myself to the limits. Then, at a project meeting about motivational techniques, I participated in a work-life balance workshop, which really changed my working and personal life.

I am not planning to give you a lecture about the benefits of the work-life balance concept. You may already be a perfectly happy person, who is fulfilled in every aspect of life. I hope you are. However, if you find yourself in a situation where you are pushing yourself to the limit because you struggle with your work or other challenges, I would like to encourage you to step back, take a deep breath and answer the question: "Do I look after myself well?"

After all, the main purpose of life is to be happy. And, if you are, I can guarantee you that you will be a better project manager!

Have you had a similar revelation in your working life? Do you feel that both you and your team have a perfect understanding of work-life balance and its impact on effectiveness? If this is something about which you have doubts or if you have noticed a lack of balance in your own life or the lives of your colleagues, the following

workbook has some useful information about work-life balance principles and how best to implement them.

The workbook

The workbook is designed in such a way that you can use it independently. However, it will be much more enjoyable and productive if you carry out these exercises with your project team and use them to stimulate discussion about work-life balance and project management standards in your organisation or project consortium.

The first part of this workbook focuses on your individual work-life balance, and the last part is dedicated work-life balance in teams. It also contains a work-life balance workshop plan that you can run with your team.

You will learn and practise how to balance:

- Individual energies
- Diet
- Physical activity
- Rest
- Mental energy
- Emotional energy
- Spiritual energy
- Time management and core values
- Your team work-life balance

Table of contents

- 1. Your own work-life balance 5
- 2. Balance your individual energies 6
- 3. Physical Energy: Diet 10
- 4. Physical Energy: Exercise 13
- 5. Physical Energy: Rest 18
- 6. Emotional Energy 21
- 7. Mental Energy 23
- 8. Spiritual Energy 26
- 9. Balance your time 32
- 10. A work-life balance plan for your team 37

1. Your own work-life balance

The fish rots from the head down.

This sentiment appears in various forms in proverbs all over the world. It rings especially true when it comes to work-life balance (WLB). If you as a manager do not respect your own life balance or constantly undermine its importance, your team will follow your way of working. Initially, you may be happy about this. You may feel like you have a team of people with a similar work ethic. However, this is unlikely to last.

Teams that do not take the time to enjoy a social life, hobbies, and rest will, sooner or later, burn out. This increases staff turnover and can cost your organisation a significant amount of time and money. Constantly recruiting and training staff is not an ideal situation for any project manager. Modelling and promoting good WLB can therefore be a worthwhile investment in your organisation as well as the wellbeing of both you and your team.

Exercise No. 1

Team work-life balance

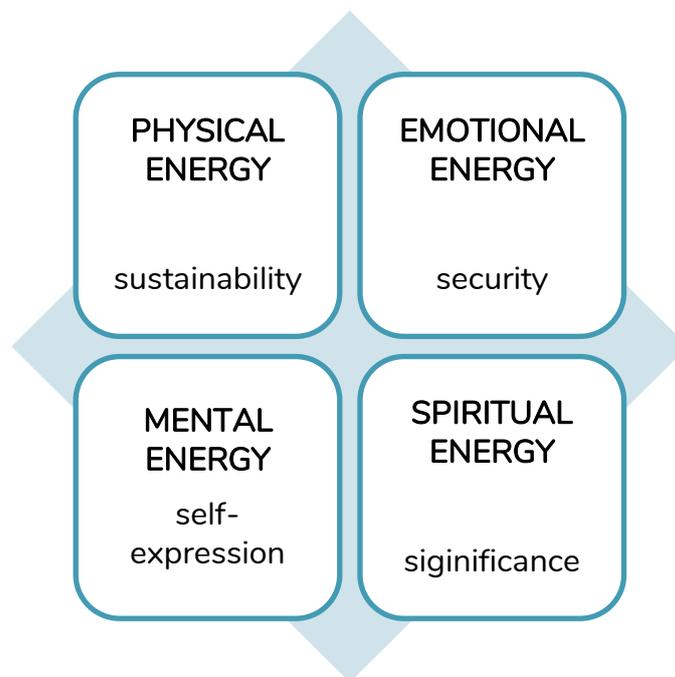
This exercise consists of making a list of what works and does not work in terms of work-life balance. You can do this exercise in your own or as a team activity. We recommend doing it with your team if you can. It helps people open up about their needs and, as a team leader, you can learn more about what works and does not work for your team.

What Works	What Doesn't Work

2. Balance your individual energies

The importance of balancing our different types of energy is based on biology and has been demonstrated in countless studies. This is not just about increasing happiness; it is about increasing effectiveness. Human beings have a finite amount of energy that they can use before they need rest and recuperation. We may want to push ourselves more but once our energy in a certain area is spent, we are asking for burnout by pushing ourselves further. It is, therefore, more important to focus on managing our energy than managing our time.

In their bestselling book, *The Way We're Working Isn't Working*, authors Schwartz, McCarthy and Gomes list four types of energy that we need to focus on replenishing each day. This is referred to as our "Four Essential Needs": Sustainability, security, self-expression and significance.



Sustainability: Being able to regularly rejuvenate and take care of yourself. Feeling healthy, fit and resilient.

Security: Feeling appreciated, cared for, valued for who you are and what you do.

Self-expression: Freedom to develop and express your unique skills and talents.

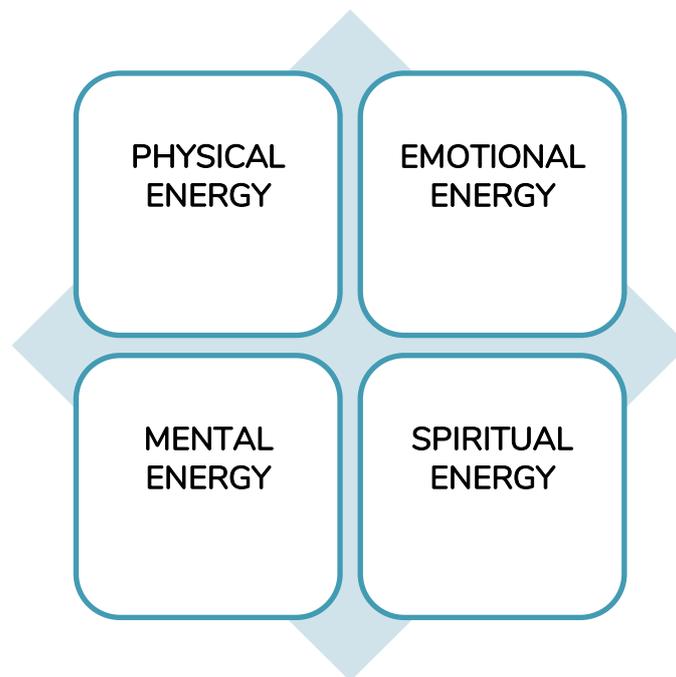
Significance: What you stand for and believe in; what gives you a sense of meaning¹. We need to find a balance between taking care of ourselves and taking care of others.

Taking care of each energy source will lead us to feel more balanced. The clue is to find your individual way for rejuvenating each type of energy. In this chapter, I will share some tips I have learned from balancing energy in the hope that they will be useful to you and your team.

Exercise No. 2

Work-life balance “legs”

Stand up next to a wall with both feet firmly on the ground. Feel how stable you are. Now place both palms on the wall. Do you feel a difference? Do you feel more stable and secure? Now, imagine that every limb you lean on is a type of energy. What happens when you lift one leg or one hand? What happens when you stand on just one foot? Can you stand firmly on one hand?



¹ *The Way We're Working Isn't Working: The four keys to transforming the way we work and live*, Tony Schwartz, Jean Gomes, Catherine McCarthy, p.9

This is what happens when you don't balance these different types of energy.

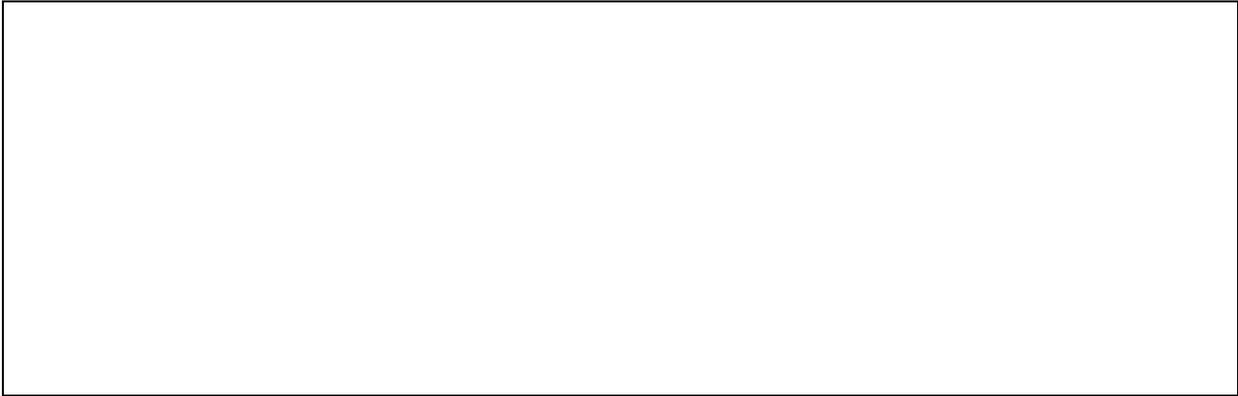
Now, sit down again and think about the four types of energy in your life and what you do to maintain each of them. Note your thoughts here:

Physical energy:

Emotional energy:

Mental energy:

Spiritual energy:



3. Physical Energy: Diet

Recuperation of physical energy is based on three basic components: healthy eating, physical activity, and rest. There is nothing revelatory about this statement. We have all known since childhood that these three areas are the cornerstones to physical wellbeing. However, these three components of health tend to be the first thing to go when we are stressed and overwhelmed at work.

Tips to stay on track with a healthy diet

- Develop an awareness of your own daily diet. You can do this by logging your food using a free application (e.g. My Fitness Pal or Fitatu) or by consulting a dietician.
- Choose healthy foods that you enjoy. For example, I am not fond of shellfish or fruit, so I do not force myself to eat them. I just try to eat more vegetables and other types of fish to get the nutrients I need.
- Always plan your meals for the following day. If I have time, I prepare meals in advance and pack them in reusable lunchboxes. When I do not have time or if I will be in transit all day, I research where I can eat in advance and how I can make time to fit in a nutritious lunch. I always carry healthy snacks with me in my bag, e.g. fruit, nuts, chopped vegetables, and energy bars. I aim to eat every 3 or 4 hours.
- Drink a lot of water. Buying a good quality reusable water bottle can help to encourage you to drink more.
- Eat mindfully: Start with small portions, eat slowly and pause before getting seconds. Avoid the distraction of electronic devices while eating.
- Use the Hunger Scale to help you maintain healthy eating habits. Stay in the middle of the scale by starting to eat at 3 or 4 and stopping at 5 or 6.

1	So starved you're week and dizzy
2	Extremely hungry and feeling irritable; lots of stomach growling
3	Less famished; hungry enough for occasional stomach growling
4	Mildly hungry – often following a light snack
5	Satiated –feeling neither hunger nor fullness
6	Mildly full with no discomfort
7	Full enough for mild discomfort
8	Stuffed enough for more notable discomfort
9	“Christmas-stuffed”, possible with extreme discomfort
10	Filled to the point of feeling sick

Exercise No. 3

One week with healthy diet

Try to practice two of the healthy eating habits mentioned above over the course of a week. We encourage you to use mindful eating for at least one meal a day and to monitor your hunger scale while eating lunch and dinner. To help you with this task, we prepared a simple monitoring form. All you need to do is mark the task you completed:

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday	
	Mindful eating	Hunger scale												
Breakfast														
Lunch														
Dinner														

4. Physical Energy: Exercise

Regular physical activity not only has a positive effect on how our bodies look and feel. It also has a major role to play in coping with stress. Exercise and other physical activity produce feel-good endorphins and improve our ability to sleep, which in turn reduces stress.

If you are still unconvinced of the importance of increasing physical activity in your daily life, consider the following positive effects of regular exercise:

1. Lower rates of coronary heart disease, hypertension, stroke, diabetes, colon and breast cancer and a higher level of cardio respiratory and muscular fitness.
2. A healthier body mass and composition and enhanced bone health.
3. Higher levels of functional health.
4. Better cognitive functioning.
5. Higher levels of wellbeing.

According to the World Health Organisation (WHO)², adults aged 18+ years should do at least 150 minutes of moderate-intensity aerobic physical activity throughout the week or at least 75 minutes of vigorous-intensity aerobic physical activity throughout the week, or an equivalent combination of both.

Aerobic activity should be performed in sets of at least 10 minutes duration.

For additional health benefits, adults should increase their moderate-intensity aerobic physical activity to 300 minutes per week or engage in 150 minutes of vigorous-intensity aerobic physical activity per week, or an equivalent combination of both.

Muscle-strengthening activities should be done involving major muscle groups on 2 or more days a week.

²WHO (2010). Global recommendations on physical activity for health.

The WHO³ also gives the following tips for becoming more physically active:

- **Create an intention:** Before you start to change your behaviour, it is important to create an intention. An intention could be for example: "I want to improve my fitness", "I want to handle stress better", "I want to be in better shape so I can go hiking with my children next summer".
- **Plan your activities:** To realise your goal, it is best to define concrete and realistic plans for yourself to consolidate your motivation. Therefore, you define *what* you want to do in your daily life and *when* and *how* you will do it.
- **Choose a physical activity that you enjoy:** We are all different. We have different preferences, body types and different past experiences. Although it is important to combine all types of exercise (aerobic, strength, balance and flexibility), the key to success is to find a type of exercise that you enjoy. There is nothing less motivating than forcing yourself to do things that you hate. So, if you don't have a favourite sport, try out some new ones. Start going for long walks and gradually work your way up to jogging. Go to the swimming pool. Sign up for yoga or another type of group fitness class. Once you have tried a few different sports, choose whichever one is the most enjoyable for you.
- **Recognise and experience barriers:** It can be easy to start exercising but difficult to maintain your new routine. Events (e.g. unexpected visitors), other barriers (e.g. bad weather conditions) or your inner couch potato (e.g. "I would prefer to stay in and read my book today") may hinder you in doing your planned activities. Such barriers are normal. You will experience them more often at the beginning of your active lifestyle. Acknowledge them and come up with strategies to deal with them.
- **'Postponed is not abandoned':** Learn coping strategies for times when you get off track. If an unexpected event occurs, it can be convenient to abstain from the planned activity. However, if you live according to the motto 'postponed is not abandoned', it encourages you to stick with it and come up with a new plan. If unexpected events happen more often, you can adapt your plans to accommodate them. Encouraging your family and friends to join you in your activity can be a great way to combine socialising with physical activity.

³Based on Needs analysis of Active I project, 2013-2016, 539664-LLP-1-2013-1-DE-GRUNDTVIG-GMP

You can use coping strategies for other barriers. In this case, coping strategies just means an alternative course of action in the face of certain events. For example, if it's raining and you can't exercise outside, you could plan to go for a swim in an indoor swimming pool instead.

If your biggest enemy is your inner couch potato, you can employ several strategies to cope with this. For example, you can make plans to exercise with friends, which can help to motivate you. Even just telling other people about your intentions can act as an external motivator. Positive self-talk can also help to motivate you as well as visualisation of the positive effects of exercising.

You will have to find your own strategy to overcome internal or external barriers. Test them in several situations and adapt the techniques that work best for you.

Exercise No. 4

Healthy physical activities

Now that you know the theory, it is time to make your healthy physical activity plan. Answer the questions below:

1. What is your intention? What is the change you want to apply in your life?

2. What physical activities do you enjoy the most?

--

3. Make a weekly plan:

	Physical activity
Monday	
Tuesday	
Wednesday	
Thursday	
Friday	
Saturday	
Sunday	

4. What barriers do you think you will experience? How will you cope with them?

Barriers	Coping Strategies

5. Physical Energy: Rest

Whether you like it or not, your body needs to rest. Nowadays, we tend to treat this duty as a luxury activity. Many of us feel guilty for taking time to rest and see it as being idle. Even during weekends, we plan so many tasks: laundry, housework, gardening, etc. While this can feel productive, it means we stay in work mode constantly. People need to learn how to rest properly.

The following are some tips for how to incorporate rest into your routine:

- **Sleep** at least 7 hours a night. The best time for restorative sleep is between 10 pm and 2 am, when our body produces the most melatonin and human growth hormone. Matthew Walker, in his book *Why We Sleep*, demonstrates how lack of sleep can diminish and even ruin our cognitive skills and immune system. Our body and mind need sleep to learn, remember and create. We also need sleep to maintain a fully functioning immune system and fight diseases, including dangerous cancer cells. The author gives some advice on how to sleep well:
 - Avoid caffeine and alcohol, especially if you suffer from sleep deprivation.
 - Try to maintain a regular bedtime and get up at the same time every day. Regularity will anchor your sleep and improve the quantity and quality of that sleep.
 - Keep your bedroom at a cool temperature: 18 degrees Celsius is optimal. Your body needs to drop its core temperature to fall into deep sleep.
- **Breaks at work.** Note that you can only work effectively for ninety minutes without pause. You may technically work for longer than this, but it will put a strain on your mind to focus your attention on the task at hand and you can start to feel physically uncomfortable. Take a break to refresh your energy every 90 minutes. Have a short walk in the fresh air or even just a stretch. Take time to have healthy meals and snacks throughout the day and avoid distractions like phones and computers. Give your mind a break from this stimulus and instead chat with colleagues or friends or just enjoy quiet time. You can also take some short breaks to meditate and practise mindfulness.

This can be very beneficial if you find yourself preoccupied with work stress as it can remind you to come back to the present and calm your mind.

- **Weekends.** If possible, plan your working week so that you enjoy two full days off. I completely understand that for many people this is just not possible. However, it is important to remember that, throughout history, cultures from all over the world have designated at least one day for rest, reflection, and connecting with our social circle. The human spirit needs this time to slow down and recalibrate before another busy week begins. The weekend is often our best time to do this. Try not to miss the opportunity.
- **Holidays.** Go on holidays and encourage your colleagues and staff to do the same. Some people prefer short, one-week holidays more frequently, while others need at least three week's holidays to reenergise themselves effectively. *How* we rest is more important than *how long* we rest. If we bring our work phone on holiday or check emails several times a day, we are not allowing ourselves to fully rest. Our holidays can end up being a waste of time and money as we get no restorative benefit from them. Plan effectively and try to disconnect fully in order to enjoy the true benefits of a good holiday on your energy levels.

Exercise No. 5

How do I rest?

I would like you to be honest with yourself. Take some time to think about your resting habits and answer these questions:

1. When you are working, how often do you take breaks? What do you do when you are on your break?

2. How many hours do you sleep per night? Do you go to bed at regular hours?

3. Do you take holidays every year? How do you like to rest on holidays?

4. What works for you and what does not while you are on holidays?

5. What would you like to change? Make an intention:

6. Emotional Energy

Feelings like anger, fear, and anxiety are useful when we are in a dangerous situation. Humans evolved our “fight or flight” response over millennia as a defence mechanism to cope with extreme situations. It is because of this instinct that we have survived as a species. However, the unfortunate reality is that our bodies have not had time to adapt to the modern world. Life has changed dramatically for us humans. We may not be facing ferocious predators on a daily basis anymore, but our bodies don’t necessarily know this. When we face a stressful situation at work, even though we know that we are usually not in any danger, we can still react with the same extreme intensity as our ancestors would have in the face of a physical threat. Our “fight or flight” instinct can become part of our daily routine and can lead to long-term stress, frustration, depression, exhaustion, and, eventually, burnout.

I think that everybody would agree that these emotions do not help us work effectively. Most of us want to feel motivated, engaged, optimistic, and calm. We strive to feel happy most of the time, whether we are at work, home or on holidays.

The following are some ideas for how to take care of your emotional energy:

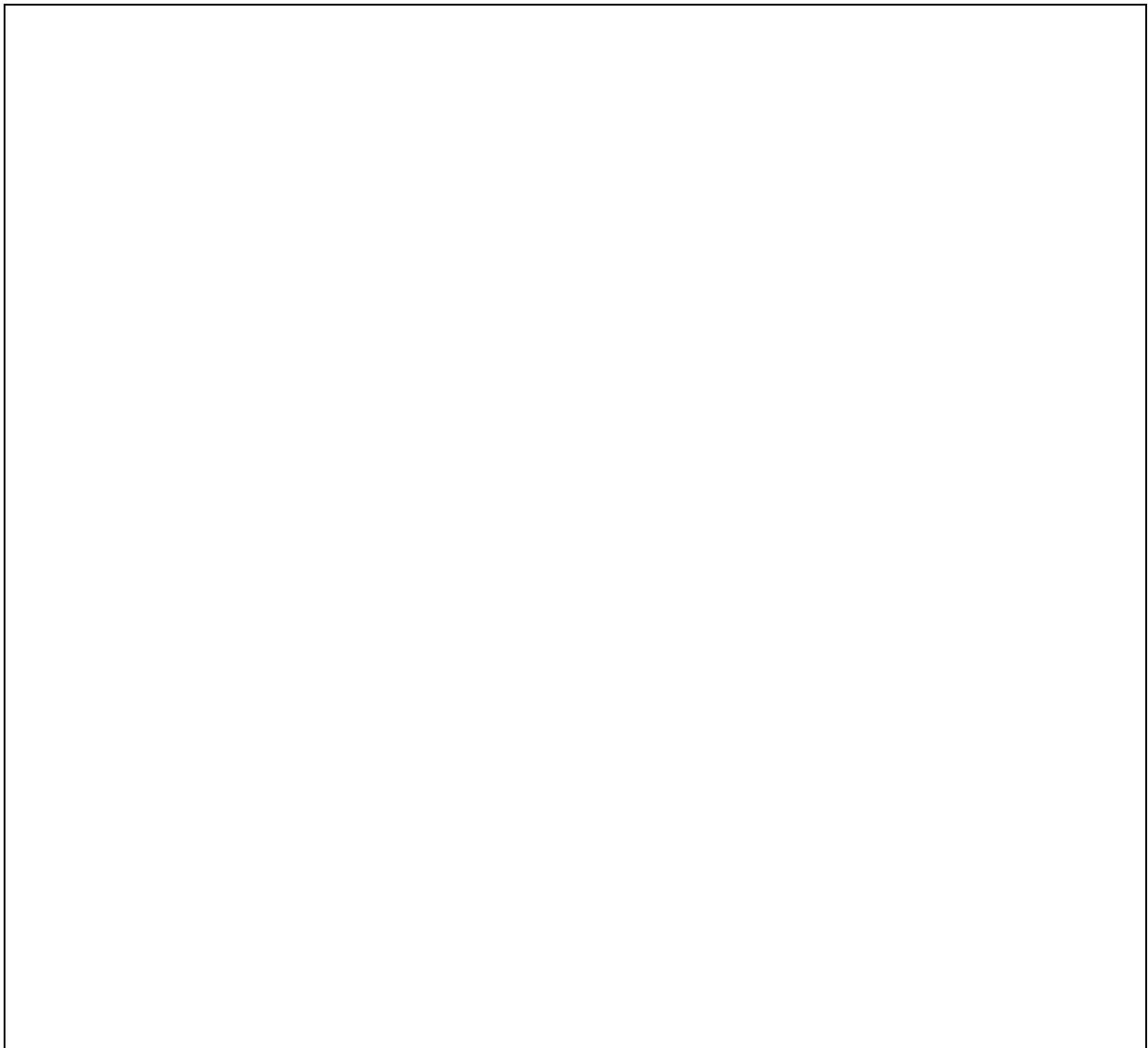
- Our emotional state is profoundly connected with how we take care of our body and physical energy. Whenever you are emotionally unbalanced, take the opportunity to move your body. Walk, cycle or even just stretch. This makes your body feel good and has a knock-on effect on your emotions.
- Cultivate positive emotions. It is scientifically proven that our brains spend more time and energy analysing our failures and mistakes than celebrating our successes. Be aware of that and try to notice even small daily pleasures. During difficult phases, plan to have at least one enjoyable activity every day. Be kind to yourself.
- Connect with people you find positive. Feeling that we belong is one of the most important needs we have. It gives us appreciation, joy, understanding and much more. Spending time with people we like and who like us has the same curable influence on our emotions as a healthy diet does on our body
- When you are triggered by a stressful situation, take three deep breaths before reacting. If possible, go for a walk or just give yourself time to let your

first, and probably negative, emotions leave your body. It is an unquestionable rule that if we are not in real danger and can therefore afford to not react immediately, we will make a better decision if we take time to cool down.

Exercise No. 6

My emotional energy

Make a list of things and activities which help you to maintain balanced emotional energy:



7. Mental Energy

Be attentive and sensitive to your mind. This is one of the most important parts of your body, it needs to be nursed and treated well, just like everything else: Your muscles, stomach, heart, etc. We all want our minds to be productive, clear, rested and ready to tackle difficult tasks. But they are not machines or computers. They need rest and time to refuel.

The following are some ideas for how to take care of your mental energy:

- Do one thing at the time. Multitasking does not develop our efficiency. In fact, there is a wealth of research that proves that multitasking reduces efficiency. Our mind is simply not capable of dealing with different tasks simultaneously. While it may be possible, it takes huge energy to skip between several different tasks. Moreover, if we try to do two things at once, e.g. talking on the phone while writing an email, we tend to perform both tasks half as well as if we had focused on just one. We can only operate at 100% and splitting your attention between several tasks means that all will suffer. This yields lower quality results and can damage our reputation as a professional and even our relationships with others. People are aware when they only have part of your attention!
- When working on one task, eliminate external distractions. Emails are a good example. They are constantly popping up and trying to grab our attention. A good solution for dealing with this is to schedule specific times of day to check your email and to keep your mail application closed and notifications off outside of this time.
- Designate a specific time of day for your creative or strategic work. Usually people are more effective in the morning, but this can vary from person to person. Find the time that best suits you. The goal is to be fully engaged during this time. Research indicates that the ideal amount of time to dedicate to this type of activity is no less than 45 minutes and no more than 90 minutes at any given time. This gives your mind time to fully engage with the process without over-exerting it. After each session, take time to rest your mind: Have lunch, go for a walk, chat with colleagues, do some meditation, etc.

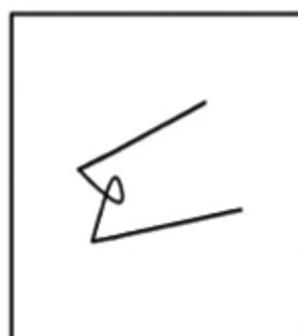
- Practise mindfulness. Mindfulness is a great tool to exercise our attention. Distractions that we are experiencing are not always external. In fact, the biggest culprits tend to be internal, specifically the stream of thoughts running through our minds at any given time. Mindfulness teaches us how to bring our attention back into focus.
- Develop your right-thinking brain. We are used to paying attention to our left-thinking brain, i.e. the part of our brain that is logical, tactical, analytical and rational. However, when we don't prioritise the right-thinking part of our brains, we can struggle to think creatively in response to challenges and situations. In the modern world, our right-thinking brain tends to be the most neglected, so nourish it by spending time on creative or inspiring activities, such as drawing, painting, mindfulness, or spending time in nature.

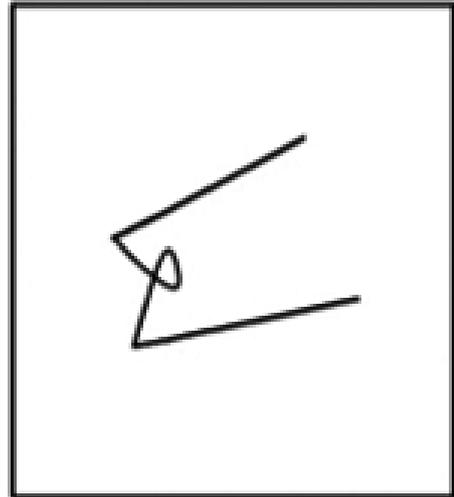
Exercise No. 7

Complete the Incomplete Figure Test

The Torrance Test of Creative Thinking was introduced by psychologist Ellis Paul Torrance in the 1960s as a way to administer a more creatively inclined IQ test. Respondents were given images like the ones below and asked to finish the picture. Higher points were awarded for answers that included rich imagery, implied narrative, or used humour or fantasy.

But you don't need to be part of a research study to take this test! Give yourself 2 minutes to complete the pictures.





You can also do this exercise with your project team. Simply print out the images, ask each team member to complete the pictures and then discuss your outcomes as a group. Which pictures are the funniest? Which are the most surprising?

This exercise can be also done as an icebreaker at a project kick off meeting.

8. Spiritual Energy

This source of energy is maybe the most important for our sense of balance but, at the same time, it is the most challenging area to define and replenish. It revolves around our values and priorities: “Why you are doing what you are doing?”. A simple question with no simple answer. To discover your true, deeply held values, you need to be in touch with your inner ego and to constantly develop self-knowledge.

The following are some ideas for how to take care of your spiritual energy:

- **Get to know your values.** Ask yourself what is important to you? It may be family, career, children, partner, financial success, passion, fitness, friends, enjoyment, learning or self-development. Now think of how much time and what kind of time you dedicate to each of the things that you have identified as most important to you. Are you happy with the results of this reflection? What can you change in your life to achieve a more satisfactory balance between your priorities? Knowing your values is like seeing a signpost at a crossroads. Whenever you must make a choice, it shows you the direction you should take.
- **Reconnect with your inner voice.** We can all end up acting in ways that please others rather than ourselves. We are constantly working under time pressure, deadlines, bosses, and funders and can forget why we are doing our job. In such times, it is worth stopping for a moment or longer to check if we are on the right track with our values and priorities. Sometimes just reminding ourselves of our core values is enough to rebuild energy and empower us to perform better and can alleviate frustration and restlessness.
- **Practise mindfulness.** This is quickly becoming a mantra, but mindfulness is good for balancing all types of energy, including spiritual energy. When you breathe consciously for just 5 minutes, you train your attention (mind energy); you observe and accept your thoughts and feelings, which develops self-awareness (spiritual energy); and, finally, you reduce stress (emotional energy). Moreover, this is a tool that almost anyone can use at almost any time. And it works.
- **Serve others.** A good way to replenish spiritual energy is to look beyond our own self-interests and to serve others. Contributing our skills and energy to

other people is a wonderful way to keep aligned with our values and to remind ourselves of what life is really about. If we can find a way to do this that is also enjoyable for us and that uses our skills and strengths, it can be even more beneficial to us. Serving others does not always mean doing voluntary work. It can be as simple as helping your neighbours, friends and family. Find what works best for you and what renews your spiritual energy.

Exercise No. 8

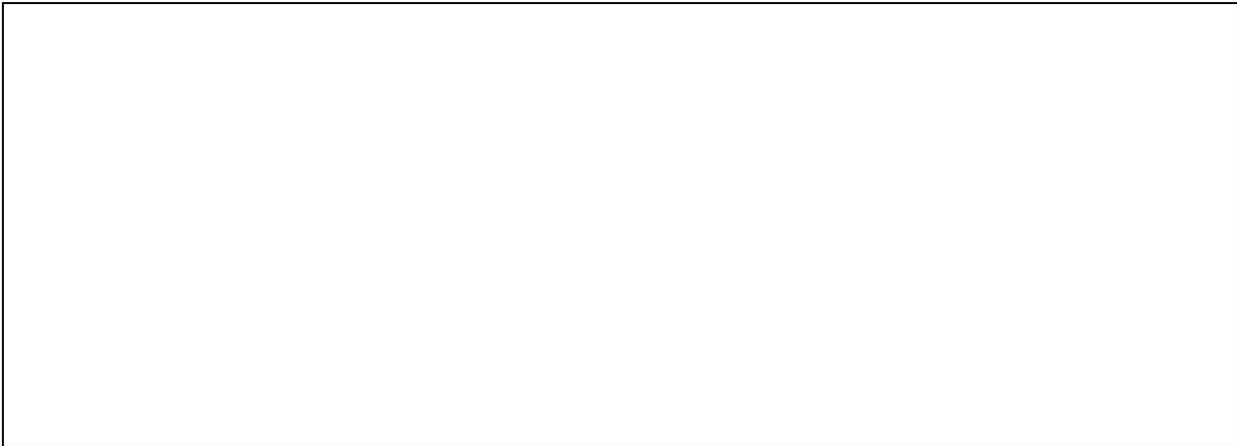
Your Core Values

Core values are the best place to start from when you are making plans for your personal or professional life. Knowing what matters, what *really* matters to you, is integral to deciding how best to allocate your time. The idea for this exercises comes from the time management book *First Things First* by acclaimed author, Stephen Covey:

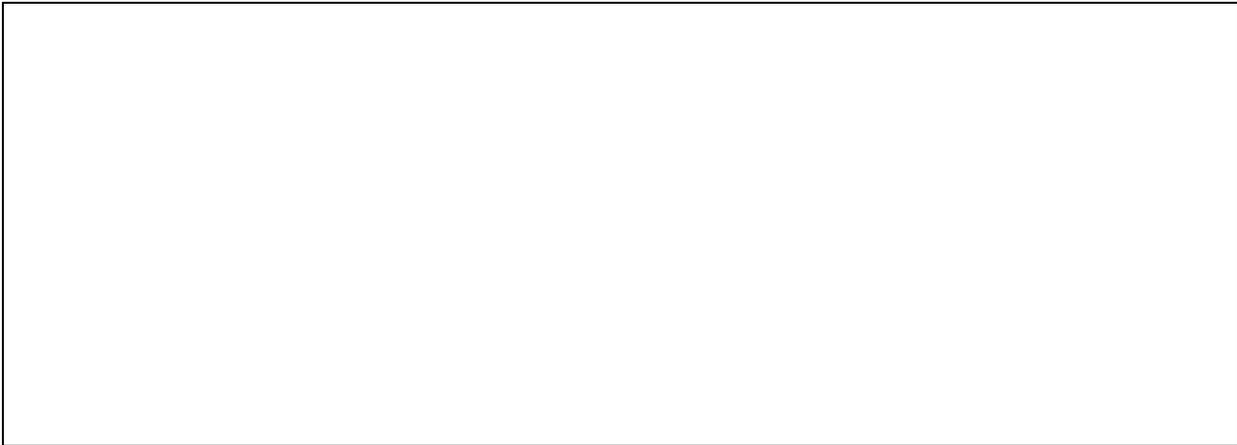
Think about all the various roles you play in life, e.g. partner, sister, friend, etc. Now imagine that it is your 80th birthday and you are having a big party. Everyone you love is there and they are all making speeches about that role you have played in their life and what it meant to them. What would you want them to say about you?



Next, create a shortlist of words that come up repeatedly. Group together similar words into themes, e.g. kind and compassionate, good-humoured and fun.



To narrow it down to a maximum of five core values, choose which of the shortlisted themes were the most important. Take time to think about each one and reflect on whether there is a more efficient way of encapsulating themes into an overarching value. For example, you might have words like kind, compassionate, and giving, but you could absorb all of these into an overarching value of generosity that encapsulates being generous with kindness and understanding, as well as your time and possessions.



The fact that you're describing these values as concepts can make them feel abstract and distant. To counteract this, personalise the core values you chose to increase your sense of ownership over them and to encourage you to think of yourself embodying these values, and, therefore, living according to them. Do this simply by summing them up in a series of "I am..." statements. So, your core values will go from a set of abstract statements to the following:

"I am generous", "I am fun loving", etc.

Next, go through each of your core values and attach a behaviour to it. By practising this behaviour, you will know you are living according to your core values. For example, what does being "fun loving" mean to you? It may mean that you don't take yourself too seriously, you look for the humour in things, and seek out joy, even when life is at its darkest. Go through each of the values you chose and write a set of behaviours to accompany them.

Our core values are supposed to inform our decision-making in life so that we know we are making choices based on what is really important to us, rather than circumstances, fear, what others think, or any of the myriad factors that influence our life choices. Here is a tool that you can use to easily check in with your core values when making a decision. To use this, fill out the table with your own core values, behaviours and the questions you would ask yourself based on each one when facing a major decision. During the decision-making process, use the “Answer(s)” section to explore the answers to each of these questions before making your final verdict about whether the decision would violate your core values. If you find that your verdict is “Yes” or “Somewhat”, you will know that this decision is not in line with your core values and you should seriously consider taking another course of action. If you find that the decision violates a core value, but you still really want to do it, you may need to re-evaluate your core values.

Value	Behaviour	Question(s) – questions to ask yourself based on this core value when facing a decision.	Answer(s) – reflect on and answer each question honestly.	Does it violate this core value? (Yes/No/Somewhat)
Generosity	<i>I am giving of my time, kindness and compassion. I share what I have with</i>	<i>Would this decision compromise my ability to give openly? Would it drain me of the energy I have to give? Is it unkind or</i>		

9. Balance your time

Once we have built our awareness of the various types of energy, we need to find a strategy for managing our schedule in a way that allows us to balance them effectively.

There are plenty of books and courses that train us to be more effective, to execute tasks in limited time and obtain our expected results (and sometimes even more). However, the truth is, we cannot control everything. The most realistic and beneficial step towards achieving our own individual sense of balance is not about squeezing the most productivity out of every minute of the day, it is about identifying and prioritising our own values and the things most important to us. Achieving good work-life balance as a project manager necessitates the development of time management skills, but the purpose of those skills should ultimately be about planning your days, weeks, and months to ensure the things most important to your sense of life fulfilment are prioritised.

Among thousands of time management tools that are available, there is one that best reflects this approach: **The Eisenhower Matrix**. This simple tool helps you to prioritise your tasks by urgency and importance. There are many versions of this matrix, but the following is my favourite and I have nicknamed it the “**Four D Tasks**”:

	URGENT	NOT URGENT
IMPORTANT	1. DO	2. DECIDE WHEN
NOT IMPORTANT	3. DELEGATE	4. DELETE

How do you use this tool?

1. First, decide if you would like to plan a day or, for example, a whole week. I prefer a wider perspective, so I use it to plan a week at a time. It also helps me to be more realistic and flexible with my schedule.
2. On a separate piece of paper, prepare a list of tasks that you want and/or must do in the period of time for which you are planning. Include every aspect of your life. Don't make a separate list for your work life and your personal life—you only have one life and 24 hours in a day! You are not just a professional. You are also a family member and friend, and those aspects of yourself are just as important as your professional life. Don't forget to plan time for yourself either and make sure to include activities that allow to rejuvenate your physical, emotional, intellectual and spiritual energy.
3. Now, allocate each task from your list into the matrix quarter that best describes it. The first few times you attempt this can be challenging, but you will become better at prioritising tasks the more you do it. Here are some tips that might help you while you're getting started:
 - a. *Urgent and important* – this should include everything that is connected to your core personal or professional objectives and values. It should also include tasks that are particularly urgent or have impending deadlines. An example of this type of task is something health related, either for you or for someone else for whom you are responsible. These tasks cannot be delegated and the consequences of not doing them are harmful to you or others. Do these tasks immediately.
 - b. *Not urgent but important* – this should include tasks connected to your core objectives, aspirations, and values, but which are not urgent in this moment. In this part, you should always plan the activities that sustain your good physical, intellectual, spiritual and social wellbeing. You also include things that help you to develop, become a better person, take care of your family, and feel joy. At work, this might include your overall strategic goals. This is the most important quarter. Our aim should always be to spend as much time as possible on this quarter. It is here that you find balance and time for rejuvenating your energy. Schedule time for these tasks every day.

- c. *Urgent and not important* – this should include everything that should be done as soon as possible but does not contribute to your core objectives and values. This is usually where we put tasks that have little to do with our overall goals, including interruptions that must be dealt with, unimportant meetings, and administrative work. The best way to manage these tasks is to delegate it to someone else if possible. Remember, delegation can have a very positive effect on your team. It can allow less experienced colleagues to gain new skills. At home, delegation to other family members can build a sense of shared responsibility.

- d. *Not urgent and not important* – this usually includes time-wasting activities. You may be tempted to include all unproductive tasks here, but remember; resting, spending time with your family or just watching movies is not a waste of time. These activities build your social and emotional capacity and rejuvenate your energy reserves. Therefore, tasks like this should be assigned to the second quarter: **Not urgent but important**. If you have doubts about whether an activity is restorative or time wasting, think of the result of this activity, or how you feel afterwards. If you feel relaxed and energised for other important activities, then it belongs in the second quarter. But if you feel guilty or even more tired afterwards, then you know the answer: It is time to eliminate these tasks from your daily plan.

Exercise No. 9

Time management

Make your own time management matrix.

	URGENT	NOT URGENT
IMPORTANT		
NOT IMPORTANT		

Look carefully on your own matrix. In all the quarters, you should have no more than seven tasks. Surveys show that seven is the maximum we can cope with at any given time. Now, you have all the information you need to plan your day or week. In doing this, remember to:

- Perform the tasks from the first quarter as soon as possible.
- Each day reserve time for tasks from the second quarter. This approach helps you to feel that you are on the right track and are living in line with your values and objectives. And don't forget about physical activity!
- Carefully estimate the time you need to execute each task. Plan only 60% of the time you have each day. The rest you need for unexpected but important issues and tasks that you didn't manage to finish the previous day.
- Perform your most important tasks during the part of the day in which you are most productive. Usually this is within a maximum 3-hour period. Treat this rule as something non-negotiable, even with yourself.

- After each hour of work, plan 10 minutes for energy recuperation. It will keep your body in good condition.
- Be realistic but also kind to yourself. Each day should have at least one activity that brings you joy.

Managing expectations

Expecting yourself to be enormously productive every single day, and to never be subject to interruptions or distractions is unreasonable. Expecting your work to always be of exceptional quality even for very tight deadlines or with lots of other competing priorities is also unreasonable. You can only do your best with the time you have. Learn to go easy on yourself and to be flexible with your expectations. Yes, it's good to aim high, but there will inevitably be times when you simply won't have time to prepare an amazing presentation with all kinds of fancy graphs or an incredibly detailed application that will wow the funders. Sometimes you have to work with what you have. Give yourself permission to simply do your best and judge your own work based on that, not on what would have been perfect.

This may seem like a cop-out but it actually demonstrates reason, flexibility and resilience. It means you can react quickly to the circumstances and adapt your work style accordingly. Most employers would prefer to have someone with those qualities than someone whose standards are impressively high, but who falls apart under the pressure when they can't get something perfect.

10. A work-life balance plan for your team

The best way to create a work-life balance (WLB) plan that serves your whole team is to design it together. Choose WLB tips and solutions that are realistic and practical for your project team and work on them during meetings.

At a minimum, a WLB plan should cover the following areas:

- I. What does WLB mean for your team?
- II. What are the most important team WLB principles?
- III. How will the team work to successfully implement these WLB principles?

Below is an example workshop programme that you can do together with your team to design your own WLB plan. If possible, reserve half a day for this purpose. Ideally you would do it towards the end of the day and somewhere outside of the office. If you are involved in international projects, you can also use this workshop during your first partner meeting to plan how you will collaborate while also practising good WLB.

The programme outlined below consists of four sessions. Between each of them, you should take short breaks and provide healthy snacks, opportunities for some physical activity and energising exercises.

Exercise No. 10

Work-life balance plan for a project team

I. Introduction

Time: 5 minutes.

Instruction: Explain why you have organised the meeting and introduce the agenda. Emphasise the importance of balance between the different roles that each of us plays in life.

Materials: Workshop agenda for each person or on a PowerPoint slide.

II. My own WLB

Time: 25 minutes⁴.

Materials: Piece of paper for each person (A4) and coloured pencils.

Instructions: Invite everyone to work individually. Give them each a piece of paper and some coloured pencils. Ask them to draw a picture that expresses how they understand WLB. Encourage them to be specific and to think about the various roles they play in life (e.g. professional, parent, child, etc). Remind them not to forget about themselves and their needs. Allow 10 minutes for this task.

Reflection: Ask each person to present the drawing and comment on it.

Summing up: You can sum up the exercise by saying: *“Each of us has different needs in terms of WLB. Therefore, we all must take responsibility for finding and maintaining our own sense of balance. However, what we can do together here and now is create circumstances and rules that will support our team on the WLB path. We will not meet each individual need, and this is not our aim, but we will try to find a way to create comfortable work conditions that will allow us to both achieve projects goals and still feel balanced in the different areas of our lives.”*

⁴Time depends on number of people. 25 min is enough for approx. 8 team members.

Outcomes: Team building and increased understanding of each other's WLB perspectives.

III. Team WLB principles

Time: 30 minutes.

Materials: Flipchart.

Instructions:

1. Ask people to work in pairs. Invite them to analyse each other's drawings and WLB perspective. Ask them to find 3 – 5 ideas that are realistic and would support them both in achieving WLB. You can share some WLB ideas from the previous section of this handbook if you need to help people get started. Allow 10 minutes for this task.
2. Invite each pair to share the results of their work. On a piece of flipchart paper, take note of each idea. If some ideas are repeated, underline them to highlight their importance. After all the ideas have been presented, discuss them with the group. If there are some that you know are unrealistic, explain this to the team. Maybe you will come across alternative solutions.

Summing up: Read the agreed list of principles aloud and ask everybody to sign the paper.

Outcomes: A complete list of WLB principles

IV. WLB working plan

Time: 30 minutes.

Materials: Flipchart.

Instructions: This session depends on the result of the previous one. Some principles may require a deadline or process and they will all need to be monitored. Responsibility for that should be divided among the team.

Explain that the aim of this session is to divide this work and responsibility:

- 1. Analyse each of the principles and outline what must be done to put it into practice. For example, internal working processes may need to be adapted to accommodate flexible hours. Delegate responsibility for this task. Plan and schedule all the steps necessary together with your team.
- 2. Elect a WLB ambassador in your team. This person will implement and monitor the WLB principle list. To make it more democratic, you can choose two people who will work together, or you can make this a rotating position.
- 3. Prepare the monitoring plan. You can use the following structure:

WLB Principle	Who is responsible for realising it (if necessary)?	How will it be monitored?	Monitoring frequency

Summing up: With your team, reflect on whether they are satisfied with the workshop results. Encourage everyone to contribute to the discussion.

Outcomes: The team WLB plan and steps for implementation.

Five Steps to Better Work-life Balance for your Team

Work-life balance for your project team is achievable. Fostering good work-life balance means that, throughout the duration of your project, your team will feel satisfied with how they balance their various roles in their personal and professional lives. Bad days will surely happen but having some simple practices and policies in place can overcome a lot of the major pitfalls that teams face when it comes to balance. Ultimately, it is about ensuring that your team feels energised and enthusiastic about their work so that you can get the best possible results for your project. Here are five steps to better work-life balance for your team based on our project management experience:

1. Start from day one

Unfortunately, work-life balance rarely emerges as a priority in project management, especially at the beginning when we are usually more focused on operational processes. Moreover, project kick-off is generally the time when our team has the most energy and motivation to take on this new challenge. This makes it easy to overlook the importance of balance. However, as projects progress, more and more instances of poor work-life balance will occur, and you and your team will face the dilemma of how to manage competing priorities. This is especially prevalent around stressful periods in the project timeline and, unfortunately, this is also the worst time to start trying to formulate work-life balance policies for your team. Starting early, when everyone is fresh and in a positive headspace, is the perfect time to think about how you can maintain that state of mind throughout project delivery. Incorporate a session on work-life balance at the very first meeting. Give it the time and attention it needs by dedicating a half day to working together in an open, creative and informal atmosphere to discuss how your team will work together in a way that you can all maintain wellbeing and balance.

2. Practice what you preach

It is important that you set a good example for your team. Make sure to show the various ways that you take care of your physical and emotional health and sense of balance. You can do this by making time to go for a short walk during your workday and inviting others to join you. You can even use these walks as an opportunity to discuss the project. Educate yourself about healthy eating and make it a part of your daily routine. Be mindful of the competing priorities in your life and talk to your team about how you go about managing them. If you need to attend to your family in the middle of the workday or go to an appointment or any of the myriad things that can come up in our personal lives, demonstrate how you make time for them. Know your core values and stay connected with them.

3. Understand the individual

Take the time to get to know what the various members of your team need to feel balanced in their lives. Help them to discover what their most productive time of day is or let them take time to figure it out for themselves. Maybe some of them prefer to work from home in the mornings and allowing them to do that will help them to feel motivated and productive. People work better when they feel good. Emphasise the “life” in work-life balance. Appreciate your team members’ passions and encourage them to pursue them. Create a space where people can come together and share the experiences they have thanks to these passions, for example, travel, books, sports, etc.

4. Create a balanced workspace

If possible, organise a diverse workspace for your team. Allow space for individual work and teamwork. Your teamwork space should be designed to boost creativity by ensuring that there are materials there that can be used during brainstorming, e.g. post-its, crayons, coloured paper, photographs, etc. Furnish it with comfortable sofas, chairs and carpets and ensure that there’s a way to play music. This space can also be used for relaxation. The space for individual work should have rules such as no talking loudly on phones and using headphones for music. Provide easy access to healthy food and snacks and, if possible, provide kitchen space. Encourage people to

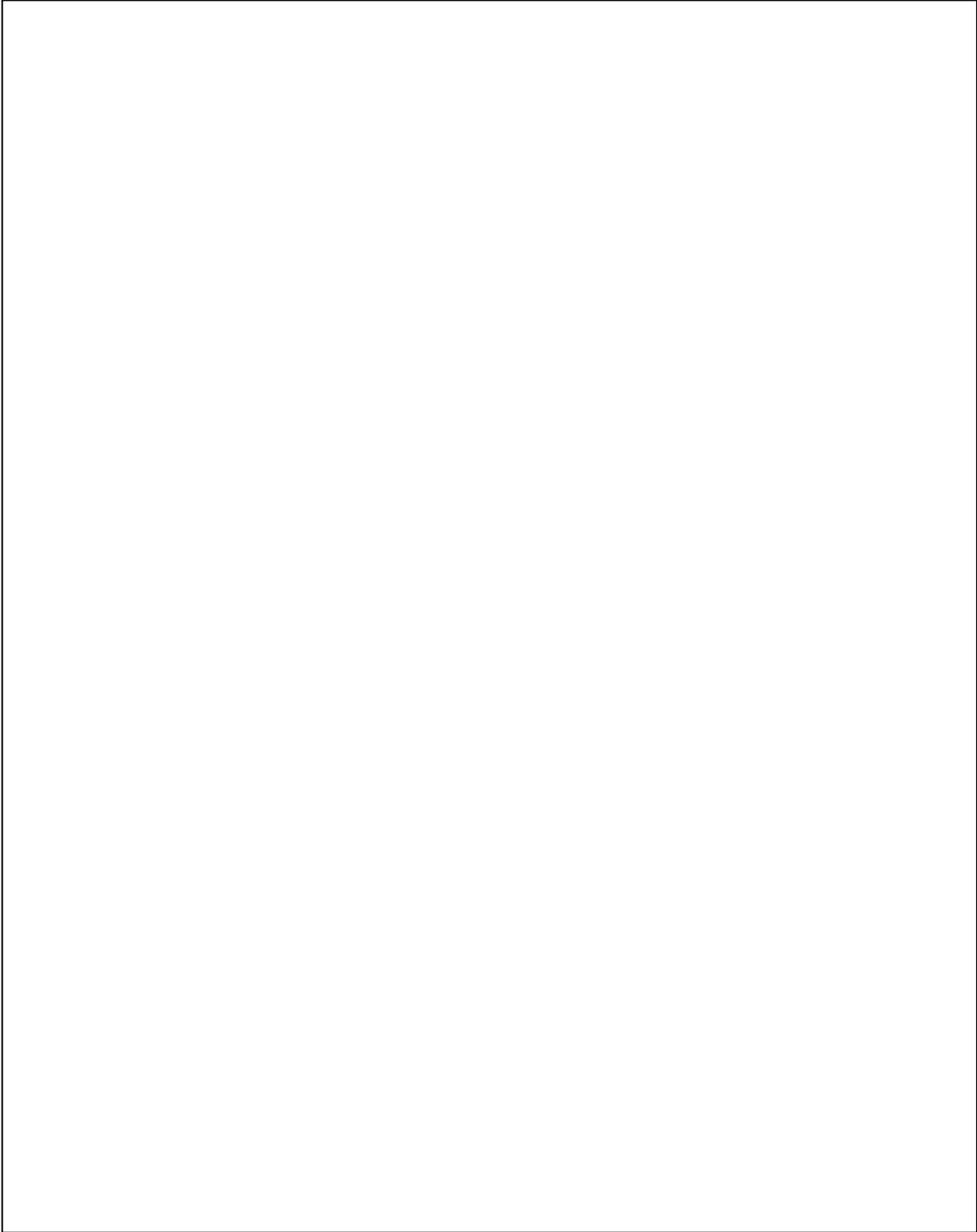
move or be physically active. If you can give them the opportunity to go to the gym in the morning or around midday, allow them to do that. It will boost their energy!

5. Live by your own rules

Work with your team to design the ideal working week. Create blocks of time that are dedicated to individual work, where everyone must respect that people should not be interrupted by phone, email, or in person. Keep operational meetings as short as possible. You might be surprised at how little time is needed. Schedule creative meetings, if possible once a week. Even if you don't always have time for them, try and set aside even 15 minutes to work together on some individual and creative exercises. Do not schedule meetings that are longer than 90 minutes. Between meetings, allow time for people to recover. Create clear goals and deliverables for each member of your team. Celebrate achieving goals, not the amount of time people spend at work. Let people work according to their individual clock.

And, last but not least, **celebrate successes**, even small ones! Whenever possible, give your team the opportunity to spend joyful time together. Let them know how much you value them and their work. Underline their input in each success you have.

Your notes

A large, empty rectangular box with a thin black border, intended for the user to take notes. It occupies the central portion of the page.