

A FREE WORKSHEET

What's on your plate

A four-step worksheet for working out what could come off it

When you're stretched thin, it's hard to see what's actually taking the most out of you, and harder still to work out what could go. This worksheet is for getting it all out of your head and onto one page, then looking honestly at what has to stay.

STEP ONE · GET IT OUT OF YOUR HEAD

Write down the responsibilities that come to mind over the next few minutes. You're not trying to capture everything, and this shouldn't turn into another task. Do be specific though: "work" isn't something you can act on, but "the extra project I took on in March" is. Leave a category blank if it doesn't apply.

Work *e.g. the extra project I took on in March*

	SORT		SORT
	☐		☐
	☐		☐
	☐		☐
	☐		☐
	☐		☐

Home and family *e.g. cooking every weeknight*

	SORT		SORT
	☐		☐
	☐		☐
	☐		☐
	☐		☐
	☐		☐

Care and admin *e.g. booking every appointment for everyone*

	SORT		SORT
	☐		☐
	☐		☐
	☐		☐
	☐		☐
	☐		☐

STEP ONE, CONTINUED

Commitments to others *e.g. the committee I joined two years ago*

	SORT		SORT
_____	☐	_____	☐
_____	☐	_____	☐
_____	☐	_____	☐
_____	☐	_____	☐

Standards I hold myself to *e.g. replying within the hour when tomorrow would do*

	SORT		SORT
_____	☐	_____	☐
_____	☐	_____	☐
_____	☐	_____	☐
_____	☐	_____	☐
_____	☐	_____	☐

STEP TWO · SORT IT

Two questions. The first decides whether it needs to happen at all. The second decides whether it needs to be yours. Write the letter you land on in the box beside each item.

- 1** **Does this need to happen, or do you want it to?**
- Test it against safety, daily functioning, wellbeing (including your own), and whether it's genuinely something you value. Anything that only exists because someone expects it is worth questioning, and expectations aren't always reasonable. That includes your own expectations of yourself.*

P PAUSE IT
No, and I could stop it for now

L LOWER THE BAR
Yes, but not at this level or frequency

YES
Go to question 2

- 2** **Does all of it need to be you?**
- Someone else could take this on, or part of it, and realistically would. Imperfectly counts, and so does handing over one piece rather than the whole thing. If your first instinct is that nobody would help, it's worth checking. People are often more willing than we assume.*

S SHARE IT
No, not all of it needs me

K KEEP AS IS
Yes, all of it needs me

If it's a work item

The same two questions apply, but the answers usually land differently. Ask whether it's actually part of your role or whether it drifted to you, and whether the standard you're holding is the one that's required. Pausing something often isn't yours to decide alone, so the realistic outcomes are usually Lower the bar or Share it, and both of those are a conversation rather than a decision.

STEP THREE · BEFORE YOU DECIDE ANYTHING

- How much of it turned out to be moveable?
- Which category filled up the fastest?
- Was anything on here just for you?

STEP FOUR · CHANGE ONE THING THIS WEEK

Choose a single item marked P, L, or S. Not the hardest one. The one you could actually let go of by Friday.

THE ITEM

WHAT I'LL DO INSTEAD

If working through this raised more than a worksheet can hold, I offer a free 15-minute consultation.
calendly.com/jenna-ionhealthperformance/free-phone-consultation