Workplace Strategies for Mental Health
Compliments of Canada Life

Workload reflection and discussion tool

This tool helps explore workload concerns and can be used in a variety of ways:

- By any employee on their own, to review their current workload and the impact it may be having on their success and well-being.
- By any employee, to prepare for a discussion with their leader about workload or work stress.
- As a collaborative discussion between a supervisor and employee, to develop solutions to workload stress.

Reflect

Insert your answers after each question.

What are my current workload stressors or concerns?

What specific impact has the workload had on me, my team, my work, my clients:

Assess

For each of the factors below, rate the level of negative impact your workload has on you, your team, and your "clients".

(Scale: 0 = no impact, 10 = substantial impact, or N/A = not applicable)

Potential impact	Extent of current negative impact		
	Me	Team	Client(s)
Mental health/stress			
Energy and focus			
Physical health			
Attendance			
Home life			
Accuracy of the work			
Quality of the work			
Meeting deadlines			
Responsiveness to inquiries/requests			
Workplace relationships			
Other:			

What are the implications of continuing as things are?

Have I tried to improve the situation? If so, how?

What specific suggestions do I have for ways to improve the situation?

What information do I have about why this situation exists?

What other information about the situation would be helpful?

Who else could help with sorting this out?

What resources or supports could be helpful to explore?

(Learning opportunities, peer training/coaching, work review/redistribution)

Prepare

When preparing for a discussion with your leader, use these three key approaches, in this order:

1. State your concerns objectively.
2. Make suggestions for improvement.
3. Answer your leader's questions and collaborate on next steps.

Template for a discussion about workload:

I have a concern with how _____ is impacting my ability to do my job well.

I feel _____ and worry that _____.

I have tried _____.

I believe it would help if _____.

I suggest we _____.

Ask: How do you see this situation? (listen closely)

Thanks for making time to review this with me.

**Adapted with permission from Dalhousie University*

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