

# Workload Conversation Guide

Effective communication between employees and managers is crucial for maintaining a healthy and productive work environment. Meaningful conversations about workload are essential as they help identify potential challenges, foster collaboration, and ensure that tasks are managed efficiently. By addressing workload concerns openly, both employees and managers can work together to find solutions that enhance productivity and reduce stress.

This guide aims to help prepare for and facilitate such discussions, providing a starting point to navigating conversations around workload to foster a supportive and healthy workplace. It is a supportive tool that can be used to help guide the conversation in an organic way. Individuals are encouraged to use this tool as it works best for them – the intention is not for it to be treated like a checklist or script. Additional tools and strategies for employees can be found on the Human Resources website and at the bottom of this guide.

## For Employees

### *Before the Conversation*

Before requesting a discussion with their manager about workload, an employee should consider the following:

1. **Self-Assessment:** Reflect on your current tasks and responsibilities as outlined in your job description. Identify specific areas where you feel overwhelmed or where you think improvements can be made (e.g., processes, technology, etc.). Reflect on the expectations you have of yourself and your team as it relates to service delivery and deliverables. Does this understanding align with the expectations determined by your manager?
2. **Prioritization:** Reflect on your current priorities, as you understand them. Do you feel that there are competing priorities or a lack of clarity in what you should be working on? Are there tasks or issues that are taking focus away from your priorities? Helping your manager understand your perspective will enable you both to find solutions.
3. **Possible Solutions/Opportunities for Improvement:** Think about potential solutions, strategies or adjustments that could help you alleviate or manage your workload better. This shows that you are proactive and willing to collaborate on finding solutions.
4. **Timing:** Choose an appropriate time to have the conversation and let your manager know about the topic you wish to discuss.
5. **Documentation:** Prepare any relevant documents or data that can support your case. This could include a list of your current projects, deadlines, and volume-specific challenges you are facing.

6. **Conversation Goals:** Be clear about what you hope to achieve from the conversation. Whether it's establishing priorities, extending deadlines, redistributing tasks, or getting additional resources or support, having a clear goal will help guide the discussion. Acknowledge that it will likely require more than one conversation to appropriately address your concern(s).
7. **Professionalism:** Approach the conversation with a positive and professional attitude. Focus on working together to find solutions rather than just highlighting problems.
8. **Feedback:** Enter the conversation with an open mind and be open to feedback and suggestions from your manager. They might have insights or resources that you haven't considered.
9. **Follow-up:** At the end of the meeting, agree on who will follow up with an email to summarize the discussion that took place. If you take on this task, you can include items such as what was discussed, anything that was agreed upon, action items, etc. Follow up with your manager, as appropriate, to ensure your workload-related concerns are addressed.

### *The Conversation*

The following section includes an overall structure and prompts that can be used as starting points for the conversation – it is not intended as a script. It is important to choose an approach and phrasing that is comfortable and appropriate to your situation.

#### 1. **Opening the Conversation:**

- "Hi [Manager's Name], could we schedule some time to discuss my current workload?"
- "Hi [Manager's Name], could we schedule some time to discuss my current workload and some personal challenges I've been facing?"
- "Thank you for meeting with me to discuss my current workload."

#### 2. **Expressing Concerns:**

- "I've been feeling a bit overwhelmed with my tasks lately and wanted to get your perspective on how I can manage them more effectively."
- "I've been feeling quite overwhelmed lately and am not feeling myself. I wanted to talk with you about how we can manage my workload better."

#### 3. **Providing Specific Examples:**

- "For instance, I'm currently handling [Project A], [Project B], and [Project C], and I'm finding it challenging to meet all the deadlines."
- "For instance, I'm currently handling [Project A], [Project B], and [Project C], and

I'm finding it difficult to keep up due to some personal challenges."

#### 4. **Seeking Guidance:**

- "I want to ensure I am focusing on the right areas. Could you help me prioritize these tasks or suggest any resources that might assist me in managing them better?"
- "I want to ensure I am focusing on the right areas. Could you help me prioritize these tasks or suggest any resources that might assist me in managing them better while also taking care of myself?"

#### 5. **Understanding Priorities:**

- "This is what I understand my priorities to be for the following week... Does this align with our priorities? If not, please let me know what I need to focus on."
- "I have been prioritizing the following items. Does this align with your perspective on what my/our priorities are/need to be?"
- "This is how I was going to use my time this week to address our priorities... "
- "Here is a different way I was thinking about prioritizing my time this week to achieve my/our deliverables..."
- "Are there any additional supports, approaches or strategies I should consider, from your perspective?"

#### 6. **Closing the Conversation:**

- "Thank you for taking the time to discuss this with me. I really appreciate your support and understanding. I look forward to your follow-up email, summarizing our conversation and next steps. If I have any questions or comments, I will be sure to let you know."
- "Thank you for taking the time to discuss this with me. I really appreciate your support and understanding. When would be a good time to check in on this issue to see how things are going?"
- You may offer to summarize the key points of this conversation in a follow-up email. Your manager can review and provide input to ensure the conversation and potential next have been summarized appropriately. Alternatively, your manager may follow up with a summary of the discussion. It is important for you both to agree on how and when this will happen.

These conversation points are just a few examples of how discussions about workload might unfold. It's important to remember that each workload situation is unique, and various factors such as individual work styles, team dynamics, and specific project requirements can influence how workload concerns are addressed. Being flexible and open to different approaches will help

ensure that the conversation is productive and tailored to the specific needs of both the employee and the manager.

## **Additional Resources**

### *Workplace Strategies for Mental Health*

For additional resources around managing workload stress, please visit the [Workplace Strategies for Mental Health](#) website. The following resources may be particularly helpful for managing workload:

- [Workload Stress](#) – includes reflection tools and worksheets related to managing workload
- [Managing Stress](#) – includes ideas for identifying, responding to, and preventing stress
- [Prevent Burnout](#) – includes signs and symptoms and strategies for preventing burnout
- [Working from Home](#) – includes strategies to support working effectively from home

### *Employee and Family Assistance Program (EFAP)*

Carleton University employees have access to the confidential Employee and Family Assistance Program (EFAP), provided by Family Services Ottawa. To learn more about EFAP, please visit Carleton's [Human Resources](#) website.

### *Human Resources*

To learn more about how Human Resources (HR) supports employees at Carleton, please visit the [HR website](#).

### *Carleton University Healthy Workplace*

Healthy Workplace encourages Carleton faculty and staff members to champion positive physical and mental health, build meaningful social connections, foster personal and collective resilience, explore opportunities for personal growth, and enjoy work-life balance. To learn more, please visit the [Healthy Workplace](#) website.

### *Learning and Professional Development*

Learning and Professional Development (LAPD) at Carleton University provides opportunities for Carleton employees to enhance individual skills and abilities, meet professional goals and continue career development. Learning opportunities such as the *Fierce Conversations* Workshop Series, focus on improving meaningful workplace communication, particularly during what are often considered to be difficult conversations. To learn more about upcoming learning opportunities, please visit the [LAPD](#) website.

Updated on November 11, 2025.