

Work-Life Balance — Workbook

This workbook accompanies the Work-Life Balance course and provides structured exercises, worksheets, and templates to translate each module's frameworks into concrete action in your own life. Work through each section after completing the corresponding module, and revisit the Action Plan and templates regularly over your 90-day sustainability period.

Diagnosing Your Balance Breakdown

Complete the Demand-Control-Support self-assessment and 7-day energy audit to establish your personal baseline before making any changes.

Exercise: Demand-Control-Support Self-Scoring

Score yourself on all three DCS dimensions honestly using the scales from Lesson 1. Resist the urge to soften your scores — accuracy matters more than comfort here. Use your scores to place yourself in the DCS quadrant grid below.

- Rate your Job Demands 1-10 and list the top 3 specific sources of demand pressure (e.g., volume of requests, unrealistic deadlines, role ambiguity).

- Rate your Job Control 1-10 and describe two decisions you made independently last week and two decisions that were made for you without input.

- Rate your Social Support 1-10. Who in your workplace actively supports you? Who drains rather than supports you?

- Based on your three scores, which quadrant are you in (high-strain, active, passive, low-strain)? What does that quadrant predict about your burnout risk?

Worksheet: 7-Day Energy Audit Log

Record your energy level and activity type every 90 minutes for 7 working days. At the end of each day, complete the day summary row. At the end of the week, tally your Zone distribution.

Date

Time

Activity description

Energy level (1-5)

Draining or Renewing?

Zone (1/2/3/4)

Daily low-point trigger

Daily high-point activity

Week total: Zone 1 hours

Week total: Zone 2 hours

Week total: Zone 3 hours

Week total: Zone 4 hours

Top 3 energy drains (from tally)

Top 3 energy sources (from tally)

Checklist: Module 1 Completion Checklist

-] Scored all three DCS dimensions and identified my quadrant
-] Completed all 7 days of energy logging without skipping sessions
-] Calculated my Zone 1/2/3/4 time distribution
-] Identified my top 3 energy drains with specific triggers
-] Calculated Impact Scores (Frequency × Severity) for each trigger
-] Chosen one concrete action for each of my top 3 triggers
-] Scheduled all three trigger-intervention actions in my calendar

Setting Boundaries That Actually Hold

Write your boundary scripts, restructure your calendar, and practice the workload negotiation conversation before you need it.

Exercise: ACT Script Writing Practice

Write three ready-to-use ACT (Acknowledge-Clarify-Transition) scripts using the formula from Lesson 1. Write them in your own voice — they should sound like you, not like a textbook. Practice each script aloud twice before using it in a real situation.

- Script 1 (Time boundary): Write a response to a colleague who messages you at 8 pm asking for something by tomorrow morning. Use the ACT formula and make sure step 2 states your limit without apologizing.

- Script 2 (Task boundary): Write a response to a manager who asks you to take on a substantial new task mid-sprint without removing anything from your current plate. Include a specific alternative offer.

- Script 3 (Relational boundary): Write a response for when a colleague repeatedly drops into your workspace for unscheduled conversations during your focused work block. How do you redirect them without damaging the relationship?

Worksheet: Calendar Architecture Redesign

Map your ideal weekly calendar using the architecture sequence from Lesson 2. First fill in the protected non-negotiable blocks, then meetings, then reactive time. Compare to your current calendar and note the gaps.
My hard-stop time (daily)

My peak window (time range, based on chronotype)

Deep work block: Monday (time)

Deep work block: Tuesday (time)

Deep work block: Wednesday (time)

Deep work block: Thursday (time)

Deep work block: Friday (time)

Mid-day recovery window (time)

Meetings I will batch (day/time)

Current calendar: % of peak hours in meetings

Redesigned calendar: % of peak hours in deep work

Tool I will use to enforce calendar blocks (Clockwise / Reclaim / manual)

How I will communicate my availability change to my team

Checklist: Boundary Implementation Checklist

- Written and practiced all three ACT scripts
- Used at least one boundary script in a real situation this week
- Added hard-stop recurring block to my calendar
- Added daily deep-work block to my calendar
- Added mid-day recovery window to my calendar
- Set working hours in my calendar application so I appear unavailable outside them
- Communicated my new availability to at least two key colleagues or my manager
- Completed the workload negotiation worksheet and identified a pending conversation to use it in

Exercise: Workload Negotiation Preparation

Prepare for a real workload negotiation conversation using the four-move framework from Lesson 3. Choose a specific current or upcoming situation where you need to push back, defer, or renegotiate scope.

- Describe the specific situation: What is being asked of you, by whom, and by when?

-
- List your current commitments with deadlines — what specific items will be affected if you say yes to this request?
-
- Write out all three options you will offer in Move 3. Make each option concrete and actionable, not vague.
-
- What outcome will you consider a success from this conversation? What is your fallback position if your preferred option is declined?
-

Recovery Science and Sustainable Rhythms

Design your chronotype-matched daily schedule and PERMA-V recovery stack, then commit to a weekly shutdown ritual.

Worksheet: Chronotype and Rhythm-Based Schedule Design

Use your energy audit data to confirm your chronotype and design a daily schedule aligned to your biological peaks and troughs.

My chronotype (lark / owl / intermediate — confirm from energy log data)

Estimated wake time

Peak window start time (roughly 90 min after waking for larks)

Peak window end time

My Most Important Task (MIT) for tomorrow

Trough window (typical time range)

Tasks I will schedule in the trough (list 3)

Second peak window (if applicable)

What I will do for my 10-20 min ultradian break after my first deep-work block

One structural change I will make to my daily schedule starting this week

Exercise: PERMA-V Recovery Stack Builder

Design your personal recovery stack by selecting at least one activity per PERMA-V dimension that reliably restores you. Be specific — 'exercise' is not specific; '30-minute run at 7 am, 4x per week' is specific.

- Positive Emotions: What specific activity produces genuine positive affect for you — not just relaxation but actual uplift? (Examples: gratitude journal, calling a specific friend, specific music, comedy, time in nature.) Describe the activity and how often you will do it.

- Engagement/Flow: What activity requires enough challenge to produce full absorption — where you lose track of time? Describe the activity and your current skill level with it. How will you schedule it?

-
- **Meaning and Vitality:** Identify one meaning-aligned activity outside work (volunteering, mentoring, creative project, spiritual practice) and your current sleep and exercise reality vs the evidence-based targets (7-9h sleep, 150 min aerobic/week). What is the single most impactful change you can make to your Vitality dimension this month?
-

Checklist: Recovery Rhythm Checklist

- Identified my chronotype from energy log data
- Scheduled my MIT during my biological peak for the next 5 workdays
- Added a 10-20 minute ultradian break after each 90-minute deep-work block
- Completed my PERMA-V recovery stack with at least one activity per dimension
- Scheduled all PERMA-V recovery activities in my calendar for the next two weeks
- Written my personalized shutdown ritual (5 steps, ending with a verbal close phrase)
- Completed the shutdown ritual every workday for at least 5 consecutive days
- Rated my subjective restoration score each Sunday evening

Designing a Long-Term Sustainable Career

Document your flexibility business case, job crafting map, and 90-day sustainability dashboard so your balance improvements are durable.

Exercise: Flexibility Business Case Draft

If you are considering requesting a flexible work arrangement, draft a one-page business case using the five-step framework from Lesson 1 of this module. Even if you are not planning to negotiate right now, completing this exercise builds the muscle and gives you a document ready when the opportunity arises.

- State your specific proposed arrangement in one precise sentence (e.g., 'Work from home every Tuesday and Thursday, in office Monday/Wednesday/Friday, available by phone 9-5 all days.').

-
- List three pieces of performance evidence from the past 6 months that demonstrate your output quality (metrics, feedback quotes, completed deliverables).

-
- Identify the top two concerns your manager is likely to raise and write one-sentence preemptive responses to each.

-
- Propose a 90-day pilot with two specific, measurable success criteria your manager could use to evaluate whether the arrangement is working.
-

Worksheet: Job Crafting Map

Complete the job crafting map for your current role. Be honest about what energizes vs drains you — this map is for your eyes only unless you choose to share it.

Task 1 (energizing/neutral/draining)

Task 2 (energizing/neutral/draining)

Task 3 (energizing/neutral/draining)

Task 4 (energizing/neutral/draining)

Task 5 (energizing/neutral/draining)

Top draining task: Can I delegate, reduce, batch, or automate it? How?

Top energizing task: Can I expand its scope? How?

One relationship to invest in more (and why)

One relationship to reduce time with (and how)

Cognitive reframe: What impact does my work have beyond the job title?

My informal rewritten role description (2-3 sentences)

Checklist: 90-Day Sustainability Launch Checklist

- Created my sustainability tracking spreadsheet with the five metrics as columns
- Recorded my week-0 baseline scores for all five metrics
- Set a recurring Sunday-evening calendar reminder for my weekly review (15 minutes)
- Identified one accountability partner and shared my 90-day goal with them
- Completed my job crafting map and identified at least two concrete task changes to implement
- Drafted my flexibility business case (or noted it as a future option if not currently applicable)
- Completed all four workbook sections and have a consolidated list of my committed actions
- Scheduled a 90-day calendar check to review trend data and decide on next steps

Your Action Plan

1. Complete the DCS self-scoring and 7-day energy audit this week before taking any other action — diagnosis must precede prescription.
2. Calculate your Impact Scores for all identified depletion triggers and commit to one concrete intervention for each of your top three.
3. Write all three ACT boundary scripts in your own voice and practice them aloud before needing them in a real situation.
4. Restructure your calendar this week: add hard stop, deep-work block, and mid-day recovery window as recurring events before adding anything else.
5. Identify your chronotype from your energy log and reschedule your Most Important Task to align with your biological peak, starting tomorrow.
6. Build your PERMA-V recovery stack with at least one scheduled activity per dimension and add them to your calendar with the same status as work meetings.
7. Write and begin practicing your personalized 5-step shutdown ritual, including a verbal closing phrase, every workday for 30 consecutive days.
8. Complete the job crafting map and implement at least two task-level changes within the next two weeks.
9. Set up your 90-day sustainability dashboard spreadsheet, record your baseline, and set the Sunday-evening review reminder.
10. At week 4, 8, and 12 review your trend lines and identify which one intervention has produced the most measurable improvement — double down on that.

