



WELLNESS CHECK

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Manager Material: Wellness Check for People Managers

how is your work life going?



Hi!

I'm excited you're diving into this! I'm assuming you're here because something in your work life isn't operating at 100% right now. We're going to figure out together what that is and what to do about it.

The foundation of being a great people manager is YOU. When I work with managers, I always start with how things are operating with them. I know from experience that when things are not balanced with the manager, inevitably, there will be poor management decision making.

Think of this guide as if we're chatting 1x1. These are the questions I would be asking you.

YOUR HEALTH

On a scale of 1 to 10, how are you operating emotionally today?

1 2 3 4 5 6 7 8 9 10

READING A BOOK ON THE
BEACH WITH A MARGARITA

FULL ON PANIC,
STRESS, OVERWHELM

If you answered anything over a 4, we've got some work to do.

When we are operating at a 1, 2, or 3, if something stressful happens, we might pop up to a 5, 6, or 7. But if we are operating at a 6, 7, or 8, when something stressful happens, we're at a 10. When I see a manager who is making emotional decisions or demonstrating some unhealthy behavior, I look first to the overall stress level and what's driving it.

A great resource for understanding our emotions is [Atlas of the Heart by Brene Brown](#).

Let's figure this out

When is the last time you took a vacation? Real, fully disconnected time away for at least 5 business days.

If 6 months+ ago (and you don't have one coming up in the immediate future), what prevented you from doing so? Was it work-related?



What would need to be true for you to take a vacation in the next 3 months?

If we were talking face-to-face, I would want you to commit to requesting the time off (minimum 5 consecutive business days) and booking a trip (within the next 90 days) over the next 2-4 weeks. That is if logistics outside of work allow for you to do so. If the logistics don't work, at least take the time off to do ANYTHING other than work. You need a break. If your hesitation to book a trip is work-related, that is always solvable no matter what your brain is currently telling you.

How often are you moving your body? In whatever way makes sense for you: elliptical, running, pilates, walking while working.

Studies have found that aerobic exercise can raise your IQ, verbal intelligence, and overall cognitive scores ([source](#)). Movement like going for a brisk walk can help with: mental clarity, concentration, and memory ([source](#)).

How often are you consuming water at a level that is healthy for your body?

How often are you relying on alcohol to decompress after work?

I'm not knocking alcohol that's in moderation. I love a good Lady Hancock after work here and there thanks to my bartender re:husband. However, I also know that consuming an average of 1.14 drinks per day for women and 2.14 per day for men, every day, leads to trouble regulating emotions, prevents REM sleep, floods your brain with glutamate which causes anxiety, and suppresses all the good happy chemicals. So if things are already stressful, drinking can actually compound the problem ([source](#)).

Lady Hancock

1 1/2 ounces vodka | 1/2 oz Lillet Blanc | 1/2 oz lemon basil syrup
3/4 oz lemon juice | 1 tbsp Luxardo cherry syrup | top off Prosecco



How are you supporting your mental health? Therapy, meditation, other?
Did you know most companies have an EAP (employee assistance program) that comes with a set amount of free therapy sessions?

What do you love to do outside of work that you aren't doing today? Reading, hanging out with friends, getting a massage at a spa.

How can you add at least one thing back in the next 2 weeks?

YOUR WORKLOAD

If you are sacrificing the things you love to do, the things that make you who you are for work, it's a losing battle. No matter how hard you fight it, work will become your singular identity which is the equivalent of walking in quicksand. Yes, you might grow your career, but at what cost? You work hard to support your life. I just want to make sure you are actually living that life.

How many days are you working each week?

How many hours a day are you working? How many days per week?



Is your time allocation to work leaving little to no room for anything else in your life? If so, what's driving the imbalance?

What needs to happen in order for you to get back to a "normal" schedule?

Taking a step back and evaluating everything on your plate is needed on a regular basis. We sometimes get in the habit of doing things and don't stop to ask questions like: "Can someone else on my team be doing this?" "Is there a process or system that would help solve this/make it more efficient?" "Should someone else on another team or an external resource be doing this?".

What steps can you take over the next 30, 60 and 90 days to drive towards a better workload?

30 Days:

60 Days:

90 Days:



let's do a calendar check

Take a look at your schedule. What's on your calendar? Rank the meetings/time blocks in order of importance.

1

2

3

4

5

6

7

8

9

10

Now, let's categorize those meetings/time blocks: Your Team, Productivity Time Blocks, Your Manager, and Cross-functional. Next to each meeting, write the corresponding category.

Go as far back and ahead as you need to in order to gather all the things that take up your time. We want to get a good look at what's on your plate.



let's take a look at your prioritization

Did you rank meetings with your team first? I guess I should ask first, are you holding regular 1x1s with each of your team members? If not, why? I have a guide to get you going if not!

Your team is the most important part of your role as a people manager. Their time with you is the core of your job and should be prioritized at the top. Those meetings should be the last thing that gets rescheduled. It's easy to go there first to cancel or push when things get hectic, but that's the wrong call.

Tip: Let your team own the invite for 1x1s. This will slow you down on pushing/canceling those meetings since you can't move it yourself. It also creates a sense of ownership.

Did you rank time blocks for productivity time next? Do you have productivity time blocked on your calendar? If not, I recommend you get to blocking.

This is truly uninterrupted time where you can get into the flow. Ideally, it's the same time every day when your brain does its best work. The consistency will help hold you accountable to utilizing that time as intended. You can define a communication hierarchy that provides your team a way to get ahold of you during the heads down time if something is truly "house on fire".

example

A sales manager client of mine asks his team to email items that don't need to be answered today, chat the things that need attention after his productivity time, and to text the "house on fire" items. He only responds to texts during the blocked time and reviews chat then email after his blocked time is done.

When are you at your best during the day to meet with: your team individually, your team together, your manager? Ex. I prefer to meet with my directs in the afternoon, specifically at 2PM. Why? I've had time in the morning to knock things out, so I can give them my full focus.

1x1s:

Team Meetings:

Your Manager:



YOUR ENGAGEMENT

Are you able to jot down right now and quickly what is expected of you? What are you being performance managed on?

1

2

3

4

5

6

7

8

9

10

What about the soft side? What are you held accountable to? Ex. Working cross-functionally effectively, being solution-oriented, effective and timely communication?



If your manager were to give you a performance rating on the year-to-date are you (circle one):

Below Expectations

Meeting Expectations

Exceeding Expectations

What do you have to support that rating?

If you were having trouble writing down your expectations, what do you need from your manager in order to have 100% clarity?

Is there anything currently getting in your way of being successful? What are they? Resources: money, time, more team members, people in other parts of the org?



Let's build an agenda for your next 1x1 with your manager, so you feel prepared to advocate for what you need. If you haven't already, I encourage you to [download my shared doc template](#) for 1x1s to use on an ongoing basis. It's a simple, yet highly effective process.

I Need More Clarity On:

The Resource Roadblocks I Have Are:

Recommended Solutions/Your Specific Asks:

Just problem-pointing will not get you very far. Coming to the meeting with suggestions and specific asks will be important!

Feedback I Need From My Manager:

You should be keeping a record of your performance along the way, so you have documentation to support what you've done when it comes time for a promotion. It's hard to remember everything we've done at the drop of a hat.



NEXT STEPS

We've dug into the main areas of the foundation of people management: YOU. It's really hard work. You've spent time analyzing your approach, now let's wrap it up with what's next. I want you to make yourself an accountability to-do list with specific dates you are committing to making the changes you wrote out in this guide.

Keep in mind that if we make 1% changes every single day, by the end of 365 days, we'll be 37 times better than we are today. On the flip side, that can go the other way. If we rely on bad habits, we can end up moving backwards (from Atomic Habits by James Clear)

At the end of the day, you're here on Earth for a finite period of time. And I want the best for you. Your career might be a huge part of you, but it shouldn't be the only part of you.

The foundation of your life is so critical: for a fulfilling life, for becoming a manager people want to follow. The manager who changes the name of the game. The manager who is set apart from the crowd. The manager who leaves a legacy. You've got this! I'm proud of you!

-Erin

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