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AI / BUSINESS GROWTH / GUIDE & WORKBOOK

Creative Energy Planning for Sustainable Work

A non-clinical UK SME guide and workbook for using a private two-week observation log and flexible task, boundary and work-design plan to support workload conversations without medicalising or surveilling people.



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Chapter links and PDF bookmarks support navigation. Writing areas are for handwritten or separate notes, not interactive PDF forms.

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A practical guide & workbook for UK SME teams

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Start here

Creative work is not one uniform type of work. A week can contain detailed problem-solving, client conversations, project administration, handovers and unexpected requests. This guide helps you notice how the *work* is arranged, then test small changes to task order, boundaries and support.

It is a private planning workbook. The labels and notes in it are **not** a validated measure, a health assessment, a diagnosis or a test of commitment, capability or fitness for work. You do not need to score yourself, explain personal circumstances, or share a log with a manager, colleague or software tool.

Use the workbook only to the extent that it is useful. You can skip a prompt, use a diary-free version based on your calendar, or stop altogether. The aim is not to optimise yourself. It is to make a clearer, more workable plan and to recognise when a work-design conversation is needed.

For managers, this guide is not a substitute for managing work-related stress risks. HSE says employers have a legal duty to assess stress risks and act on them. Its Management Standards identify six work-design areas: demands, control, support, relationships, role and change. 1 Individual routines do not remove that responsibility.

A simple boundary: plan the work; do not measure the person.

1. Use planning labels, not personal ratings

The original idea behind this workbook is task matching: not every task needs the same conditions. Here, four labels give you a neutral way to describe what seems workable on a particular day. They are prompts for planning, not facts about your body or ability.

Planning label	A possible use	Planning question
High-availability time	A task that needs quiet, sustained attention or preparation	What conditions would make this task easier to begin?
Steady time	Editing, routine collaboration or work with clear next steps	What is the next visible step?
Lower-availability time	Administration, organisation, straightforward replies or planning	What can be simplified, deferred or shared?
Protect-capacity time	Essential work only, a handover, reprioritising or stopping	What needs to change in the work, rather than in me?

You may prefer different words: *quiet time*, *meeting time*, *maintenance time* and *minimum time*, for example. You may notice no stable pattern at all. A variable pattern is not a failure and does not need explaining.

Avoid treating a label as a reason to push through difficult work or to refuse a useful opportunity. It is simply one input alongside deadlines, customer commitments, access needs, shift patterns, caring responsibilities, team availability and the control you actually have over your diary.

Choose a private method

Pick the least intrusive method that helps you plan.

- ☐ I will make brief notes on paper or in a private personal document.
- ☐ I will use my calendar only, noting task types rather than personal details.
- ☐ I will make a short end-of-week summary instead of daily notes.
- ☐ I will not keep a log; I will use the weekly planning pages directly.

Do not put personal reflections, health information or diary-style notes into an AI tool, a shared project board or a manager-owned spreadsheet. A team should not request, collate or compare these notes. The ICO advises employers to collect no more health information than is necessary for a stated purpose and to consider less intrusive approaches. [4](#)

2. Notice the work pattern for up to two weeks

A short observation period can reveal practical details: a recurring meeting that interrupts preparation, an unclear handover, a task that needs a quieter setting, or a workload that exceeds available time. It cannot prove a “natural rhythm”, predict output or identify a health issue.

Try this for up to two ordinary working weeks. One entry per day is enough. Leave blank any column that is not useful. Record task and work-context information, not sensations, symptoms or personal health details.

Two-week private observation log

Day / date	Main task or commitment	Planning label I used	Conditions that helped or got in the way	One work-design change to consider
1. ____	_____	_____	_____	_____
2. ____	_____	_____	_____	_____
3. ____	_____	_____	_____	_____
4. ____	_____	_____	_____	_____
5. ____	_____	_____	_____	_____
6. ____	_____	_____	_____	_____
7. ____	_____	_____	_____	_____
8. ____	_____	_____	_____	_____
9. ____	_____	_____	_____	_____
10. ____	_____	_____	_____	_____

At the end, circle only what is useful to carry forward:

- ☐ A task needs a clearer brief, decision-maker or deadline.
- ☐ A recurring meeting, notification or handover is disrupting the work.
- ☐ I need a protected preparation period before a particular task.
- ☐ A task can be shared, simplified, moved or stopped.

- ☐ I need a conversation about workload, scope, resources or priorities.
- ☐ No pattern is clear yet; I will keep the next plan simple.

If a daily log is not practical

Daily tracking may be unrealistic for shift workers, carers, people with variable access needs, frontline roles, shared-home workers or anyone with limited control over their time or workspace. Use one of these alternatives instead:

- Mark only the fixed commitments and deadlines in your calendar.
- Complete the weekly page after a rota or project cycle.
- Ask for a short planning conversation focused on tasks and capacity, not personal information.
- Choose one change to test without recording anything.

3. Match task conditions, not worth or ability

Task matching is a planning experiment. It does not say that one kind of work is more important than another, or that a person should work only at certain times. Start with what the task needs, then compare that with the conditions available.

Sort the work on your plate

Task type	Examples	Conditions to consider	A possible planning move
Preparation or detailed work	Drafting, analysis, design, problem-solving	Clear brief, fewer interruptions, access to materials	Reserve a short protected period or ask to move a non-urgent meeting.
Collaborative work	Client calls, reviews, handovers, decisions	Other people available, role clarity, agreed outcome	Send an agenda, name the decision needed or split the meeting.
Maintenance work	Email, filing, invoicing, routine updates	Clear next action, realistic volume	Batch a small set, delegate where appropriate or set a response expectation.
Essential response work	Incident response, urgent customer issue, unavoidable deadline	Authority, support, escalation route	Clarify who decides, what can pause and who needs to be involved.

A task may belong in more than one row. The purpose is not to make a perfect system. It is to make the next plan less vague.

Illustrative SME example — not a case study

A small design studio has a Thursday client review, a proposal deadline and a shared inbox. The team notices that proposal preparation is repeatedly displaced by last-minute requests. Instead of asking staff to “manage their energy” better, the manager agrees a visible triage rule for the inbox, confirms who can approve proposal decisions and protects an hour before the review for preparation. This is an **illustrative** example, not evidence of a result or a promised outcome.

Your task-condition map

One task that needs focused preparation:

The condition that would help most:

What is within my control?

What needs another person’s decision, resource or agreement?

The smallest next step:

4. Build a flexible working week

There is no universal focus-block length, recovery interval or ideal time of day. Rather than follow a fixed 90-minute cycle or a prescribed reset, choose one arrangement that suits the work and test it for a few days. A pause can be brief or longer; it can mean changing task, stepping away from a screen, adjusting the environment, taking an agreed break, speaking to someone, or ending work for the day where that is possible.

Choose options because they are practical and accessible, not because you expect a particular physical or performance result.

Start with constraints

Before adding a new routine, write down what is fixed.

This week’s fixed commitments	My controllable choices	Constraints that need discussion
_____	_____	_____

This week's fixed commitments	My controllable choices	Constraints that need discussion
_____	_____	_____
_____	_____	_____

Examples of constraints include a customer service rota, school runs, caring responsibilities, fatigue related to disability, public-facing duties, a shared desk, remote-work connectivity, planned leave or a manager-set meeting schedule. You do not need to disclose the reason for a constraint in this workbook. Name the practical effect instead: "unavailable after 3pm", "needs captioned meeting materials", "cannot guarantee a quiet room" or "requires advance notice".

Acas explains that reasonable adjustments are individual changes that can include different ways of working, workplace changes, working arrangements, equipment, services or support. Employers should discuss the disadvantage with the person rather than make assumptions. [3](#)

Plan one week as an experiment

Day	One must-do outcome	A task to prepare or protect	Flexible maintenance task	Boundary or support I will test	Review note
Mon	_____	_____	_____	_____	_____
Tue	_____	_____	_____	_____	_____
Wed	_____	_____	_____	_____	_____
Thu	_____	_____	_____	_____	_____
Fri	_____	_____	_____	_____	_____

Useful boundaries are concrete and work-facing. For example: "I will put the decision needed in the meeting invitation"; "I will ask which deadline has priority"; "I will turn off non-essential notifications during the proposal review"; or "I will set a handover time before leave". A boundary is not a promise to be constantly available or to absorb an unreasonable workload.

5. Turn observations into a work–design conversation

A personal plan can reveal an organisational issue. Repeated overload, unclear roles, conflicting requests or insufficient support are not solved by better individual scheduling alone.

HSE's Management Standards cover:

- **Demands:** workload, work patterns and work environment.
- **Control:** how much say a person has in how they work.
- **Support:** resources and help from the organisation, line manager and colleagues.
- **Relationships:** positive working and how unacceptable behaviour is addressed.
- **Role:** clarity and avoidance of conflicting roles.
- **Change:** how organisational changes are managed and communicated. ¹

Use the prompts below to bring an operational issue into the open. Discuss tasks, process and resources. Do not ask people to reveal health information, submit their private log or explain a disability in a group setting.

Private conversation starter

"I have looked at the work pattern for the next two weeks. The issue is [**specific task, deadline or handover**]. To make the work more workable, I need us to decide [**priority, scope, resource, timing or owner**] by [**date**]. Which option can we agree?"

The issue I need to name:

The decision or change I am asking for:

Who can decide or help:

When I will raise it:

Manager / team work–design check

Use this as a collective planning aid, not an employee assessment.

- ☐ **Demands:** Are workloads, deadlines, work patterns and the work environment realistic for the work required?

- ☐ **Control:** Can people influence the sequencing, method or timing of work where it is reasonable to do so?
- ☐ **Support:** Are the information, cover, tools, training and line-management support needed for the work available?
- ☐ **Relationships:** Is there a safe route to raise conflict, poor behaviour or repeated friction?
- ☐ **Role:** Does each task have a clear owner, decision-maker and handover point?
- ☐ **Change:** Have scope, priorities, systems or staffing changes been explained with time to adapt?

Team action (process or resource, not a wellbeing score):

Owner and review date:

The HSE approach is risk assessment and action, not collection of individual “energy” data. If a manager uses patterns from team planning, use operational evidence such as meeting load, queue length, handover gaps and unresolved priority conflicts. Keep private reflections private. 1

6. A four-week implementation sequence

The original source used a four-week sequence. This revision keeps the practical shape but removes fixed schedules, “energy banking” and outcome promises. Move more slowly, repeat a week or stop at any point.

Week 1 — Notice

Choose the least intrusive observation method. Identify one task condition that repeatedly helps or hinders the work. Do not try to overhaul your calendar.

What I noticed:

Week 2 — Discuss

Decide whether the issue is personal organisation, a process problem or an organisational constraint. If another person controls the solution, prepare a specific request.

The conversation or request:

Week 3 — Test

Try one change: a clearer brief, a meeting change, a handover, a notification setting, an environmental adjustment, a different task sequence, cover from a colleague, or a reduction in scope. Keep only what is practical.

The one change I will test:

Week 4 — Keep, change or stop

Review the work, not yourself. Keep the change, adjust it, replace it or stop using it. A useful result may simply be a clearer request for support.

My decision and next step:

7. When the plan does not fit the work

“My notes are inconsistent.”

That may be ordinary variation in workload and context. Shorten the observation period, use calendar evidence, or skip the log. Do not search for hidden personal causes.

“There is no room in the diary.”

Name what is fixed and what is competing. Ask which task can move, reduce in scope, be shared or be stopped. If no one can make that decision, raise the issue with the person who can.

“The deadline is urgent.”

Focus on the immediate operational question: what is the minimum viable output, who has authority to reprioritise, and what support is available? Do not rely on a personal routine to compensate for a workload problem.

“I have little control over my environment or schedule.”

Start with a request that fits the role: clearer instructions, a named contact, advance notice of change, accessible materials, a predictable handover, a different communication channel or help prioritising. Where disability-related disadvantage is involved, an individual conversation about reasonable adjustments may be appropriate; Acas advises that adjustments should be considered with the person, not assumed. ³

“I do not want to discuss private circumstances.”

You do not have to. State the practical work requirement where possible: an accessible format, notice period, predictable break coverage, a quieter communication channel, defined priorities or an agreed handover. Keep the discussion proportionate to the task.

8. Final action plan

Use this page to leave with a work-facing decision. A small, specific plan is enough.

What I want to make more workable

The task, deadline, process or condition involved

What I will do myself, if it is within my control

What needs an employer, manager, client or colleague decision

The boundary, adjustment or support I will ask for

Who I will speak to and by when

The smallest first action

My review date

If the plan is not workable, I will

- ☐ simplify the plan;
 - ☐ ask for a priority or scope decision;
 - ☐ seek practical support or a reasonable adjustment conversation where relevant;
 - ☐ record the operational issue through the appropriate workplace route; or
 - ☐ stop using this workbook and choose a different planning approach.
-

Keep the distinction clear

This workbook supports private, optional planning. It does not measure health, diagnose a condition, prescribe treatment or determine whether anyone is fit for work. It should never be used to rank employees, collect journals, monitor personal routines, infer health information or make performance decisions.

The strongest outcome is not a perfect schedule. It is a clear next action and, where needed, a better conversation about how the work is designed.

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