

Beyond the Checklist

Strategic Productivity for Tourism & Hospitality Leaders

Participant Workbook

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Welcome!

This workbook is your personal toolkit for implementing the strategies you'll learn today. Use it during the workshop and keep it handy as you put these practices into action. Remember: progress over perfection. Start small and build from there.

Today's Learning Objectives:

1. Learn to reset your stress response for clear decision-making
2. Understand how to triage and prioritize tasks effectively
3. Learn to delegate and communicate with clarity
4. Explore techniques to maintain energy and prevent burnout

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STRESS REGULATION TOOLKIT

Quick Stress Reset Techniques

Use these throughout your day to complete the stress cycle

Box Breathing (60-90 seconds)

- Inhale for 4 counts
- Hold for 4 counts
- Exhale for 4 counts
- Hold for 4 counts
- Repeat 4 cycles

Progressive Muscle Relaxation (2-3 minutes)

- Tense muscle groups, then release
- Start with shoulders, move through body

Brief Movement (3-5 minutes)

- Walk to parking lot
- Climb stairs
- Stretch at desk

Cold Water Reset (30 seconds)

- Splash face with cold water
- Run wrists under cold water

5-4-3-2-1 Grounding (2-3 minutes)

- Name 5 things you can see
- Name 4 things you can hear
- Name 3 things you can touch
- Name 2 things you can smell
- Name 1 thing you can taste

My Stress Reset Plan

Which techniques will you try first?

This week, I will try:

Best times to use stress resets:

Reminder/trigger to use them:

NOW-SOON-LATER-NOPE FRAMEWORK

Task Triage: Sorting Your Work

NOW (Do today/this shift)

- True deadline today
- High impact if not done
- Only you can do it
- Resources available

Tasks:

1. _____
2. _____
3. _____
4. _____

SOON (Do this week)

- Important but flexible deadline
- Moves priorities forward
- Can be scheduled strategically

Tasks & Scheduled Time:

- | | |
|----------|-------------|
| 1. _____ | When: _____ |
| 2. _____ | When: _____ |
| 3. _____ | When: _____ |
| 4. _____ | When: _____ |
| 5. _____ | When: _____ |

LATER (Do eventually)

- Important but no immediate pressure
- Future projects/initiatives
- Assign specific future date

Tasks & Target Date:

1. _____ Date: _____
2. _____ Date: _____
3. _____ Date: _____

NOPE (Don't do)

- Eliminate (low value)
- Delegate (someone else should do)
- Decline (not your responsibility)
- Automate (system can handle)

Tasks & Reason:

1. _____ Why: _____
2. _____ Why: _____
3. _____ Why: _____

MANAGING NEW DEMANDS

Decision Protocol for Incoming Requests

When a new task arrives, ask:

1. **PAUSE** - Don't automatically say yes ☐ Taken a moment to consider
 2. **SORT** - Which category? ☐ NOW (must be done today) ☐ SOON (this week) ☐ LATER (specific future date) ☐ NOPE (eliminate, delegate, decline)
 3. **CHECK CAPACITY** Current NOW tasks: _____ (should be 2-4 max)
Current SOON tasks scheduled: _____
 4. **COMMUNICATE TRADE-OFFS** If adding this, what moves?
-

5. ADD TO APPROPRIATE CATEGORY

Added to: _____

Scheduled for: _____

Sample Scripts

"I'm currently focused on [X priority] which needs to be completed by [deadline]. I can take this on, but it would mean [Y task] moves to [new timeframe]. Does that work?"

"This sounds like it would be better handled by [person/team]. Would you like me to connect you with them?"

"I'd be happy to help with this. My next availability is [date/time]. Will that timeline work?"

DELEGATION PLANNING

Effective Delegation Framework

Tasks I Could Delegate:

Task	Who Could Do It	Why This Person	When to Delegate
1.			
2.			
3.			

5-Step Delegation Process

Task to delegate: _____

1. **DEFINE** - Clear outcome and standards What does "done" look like?

2. **CONTEXT** - Explain why it matters Why is this important?

3. **SUPPORT** - Resources and authority needed What do they need to succeed?

4. **CHECK-INS** - Timeline and update schedule When will we check in?

5. **FEEDBACK** - Plan for closing the loop How will I provide feedback?

TEAM CAPACITY CONVERSATIONS

Regular Check-In Questions

Weekly team capacity conversation:

Questions to ask:

- "What's currently on your plate?"
- "Where are you feeling stretched?"
- "What can we move, reduce, or remove?"
- "What support would help you most?"

Team Member: _____

Their current workload:

Their NOW tasks (this week):

1. _____
2. _____
3. _____

Capacity level: ☐ Under ☐ At ☐ Over

What we adjusted:

Support needed:

PERSONAL ENERGY MENU

Six Categories of Energy Boosters

Identify 2-3 activities in each category that work for YOU

PHYSICAL (movement, nutrition, hydration)

1. _____
2. _____
3. _____

MENTAL (breaks from thinking, different tasks)

1. _____
2. _____
3. _____

EMOTIONAL (positive interactions, gratitude, humor)

1. _____
2. _____
3. _____

SOCIAL (meaningful connection)

1. _____
2. _____
3. _____

CREATIVE (novelty, variety, learning)

1. _____
2. _____
3. _____

SPIRITUAL (nature, meaning, values alignment)

1. _____
2. _____
3. _____

My Daily Energy Plan

Morning energy booster: _____

Mid-day energy booster: _____

Afternoon energy booster: _____

Reminder to use them: _____

BURNOUT PREVENTION & BOUNDARIES

Burnout Warning Signs Checklist

Check any that apply to you currently

☐ Constant exhaustion despite rest ☐ Cynicism or detachment from work ☐ Reduced sense of accomplishment ☐ Increased irritability or impatience ☐ Physical symptoms (headaches, sleep issues, stomach problems) ☐ Difficulty concentrating or making decisions ☐ Withdrawal from colleagues or social situations ☐ Feeling overwhelmed or helpless

If you checked 3 or more, it's time to take action.

Sustainable Work Practices

My definition of "true emergency":

My communication boundaries: Available for routine matters: _____

Available for emergencies: _____

Protected time I will commit to:

How I'll communicate this to my team:

Setting Boundaries Script

"I need focused time this [morning/afternoon] to complete [specific task] so that I can [specific outcome/deadline]. I'll be available at [time] unless there's an emergency, which for today means [define emergency]."

My boundary script:

PRIORITY ALIGNMENT CONVERSATIONS

Weekly Supervisor Check-In

My priorities for this week:

1. _____
2. _____
3. _____

Questions to ask:

- "Here's what I'm focusing on this week - does this align with your priorities?"
- "Are there other priorities I should be aware of?"
- "If [X] becomes urgent, I'd need to shift [Y]. How should I handle that?"

Notes from conversation:

Confirmed priorities: ☐ Priority 1: _____

☐ Priority 2: _____

☐ Priority 3: _____

Trade-off decisions discussed:

Political Cover Script

"I'd love to help with [request]. I'm currently focused on [priority task] which is [supervisor's] priority for this week. I could take this on, but it would mean [trade-off]. Would you like me to check with [supervisor] about shifting priorities, or would [alternative timeline/person] work better?"

YOUR IMPLEMENTATION PLAN

This Week's Commitments

Choose 1-2 items from each category to start

STRESS REGULATION ☐ Practice box breathing once daily ☐ Use one stress reset after difficult interactions ☐ Try _____ technique when _____

TASK TRIAGE ☐ Sort all current tasks using NOW-SOON-LATER-NOPE ☐ Keep NOW list to 2-4 items maximum ☐ Block calendar time for all SOON tasks ☐ Identify at least one NOPE

DELEGATION ☐ Identify one task to delegate this week ☐ Have delegation conversation using 5-step process ☐ Have capacity conversation with team member ☐ Teach NOW-SOON-LATER-NOPE to my team

ENERGY MANAGEMENT ☐ Use 2-3 energy boosters daily ☐ Complete personal energy menu ☐ Match high-energy tasks to peak focus times ☐ Take actual breaks during shifts

BOUNDARY-SETTING ☐ Have priority alignment conversation with supervisor ☐ Define "emergency" clearly with team ☐ Set and communicate one boundary ☐ Practice saying no/making trade-offs visible once

Daily Practice Checklist

MORNING (5 minutes)

☐ Quick self check-in: How's my energy? Capacity? ☐ Review NOW tasks (2-4 items max) ☐ Identify SOON tasks that need blocking today

THROUGHOUT DAY

☐ Use stress resets after difficult moments ☐ Use 2-3 energy boosters ☐ Apply triage to new demands before saying yes

EVENING (3 minutes)

☐ Brief reflection: What worked today? ☐ What do I need to adjust tomorrow? ☐ Celebrate one win

Progress Tracking

Week 1: What I tried: _____

What worked: _____

What I'll adjust: _____

Week 2: What I tried: _____

What worked: _____

What I'll adjust: _____

Resources & Support

Need help?

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