



Managing Your Energy, Not Your Time

August 31, 2022

Agenda

1. The impact of stress, unpredictability and change
2. Time management vs. Energy management
3. Ways to recovery / energy
4. Employee and Leader resources



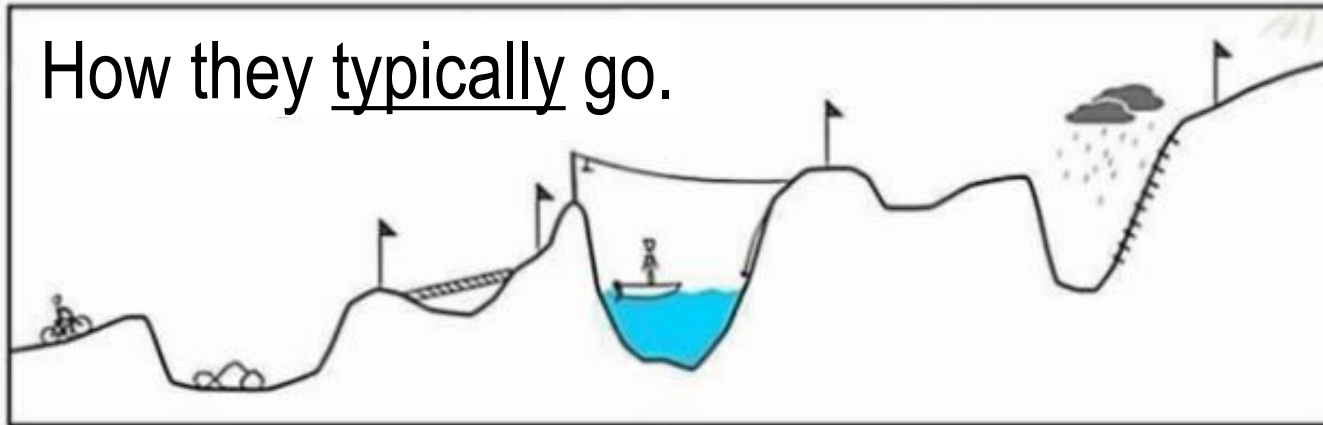
How we want our work / lives to go.



How we want our work / lives to go.



How they typically go.



Stress and Burnout

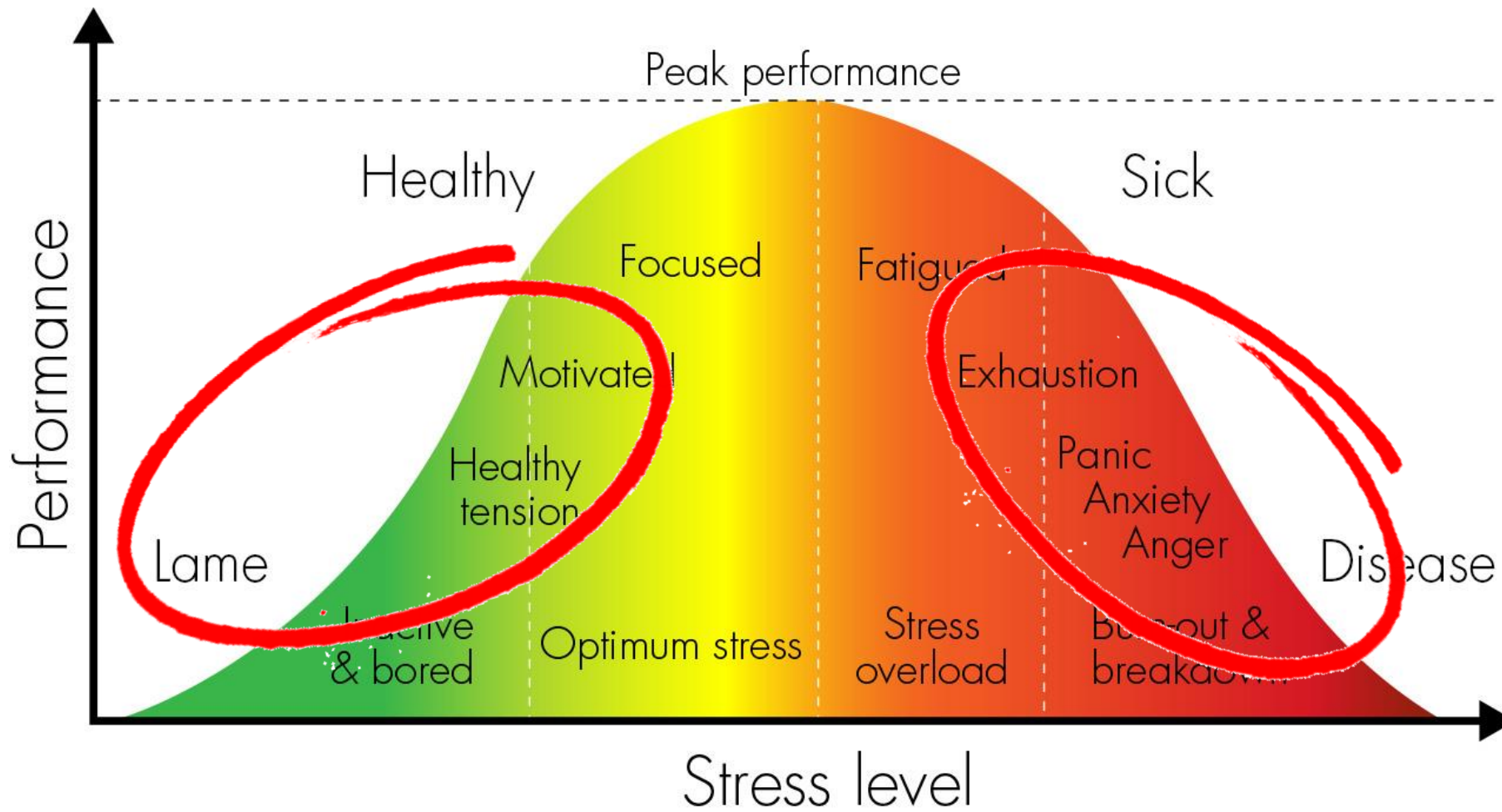
Stress is a *natural response* to any demand, positive or negative, placed upon an individual...

...becoming problematic when there is an imbalance between demands placed on us and our ability to tolerate and recover.

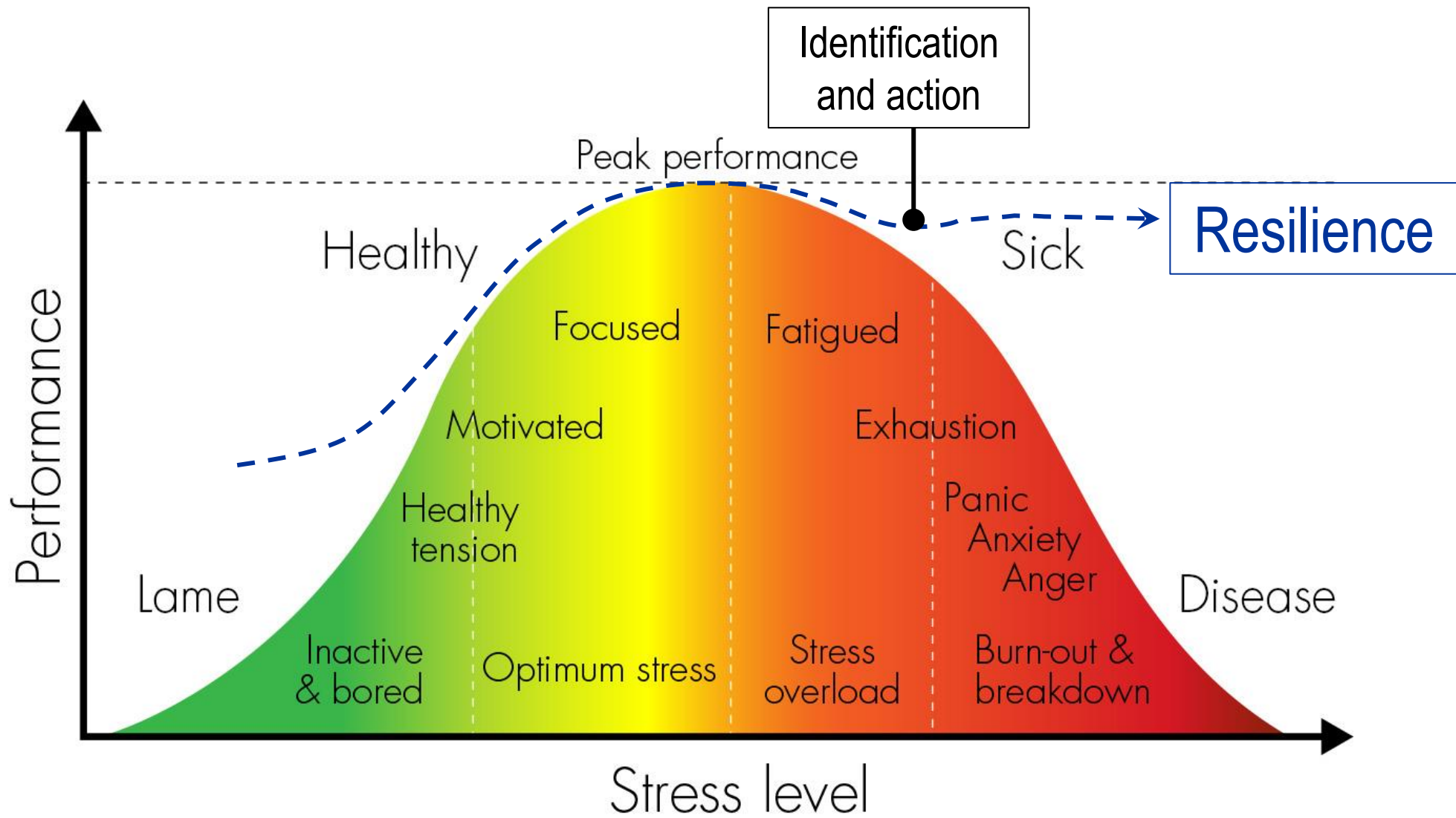
Burnout is a term often used to describe the symptoms we experienced after periods of prolonged, unmanaged stress.



“A job without stress isn’t a job.”



Yerkes Dodson Law (1908)



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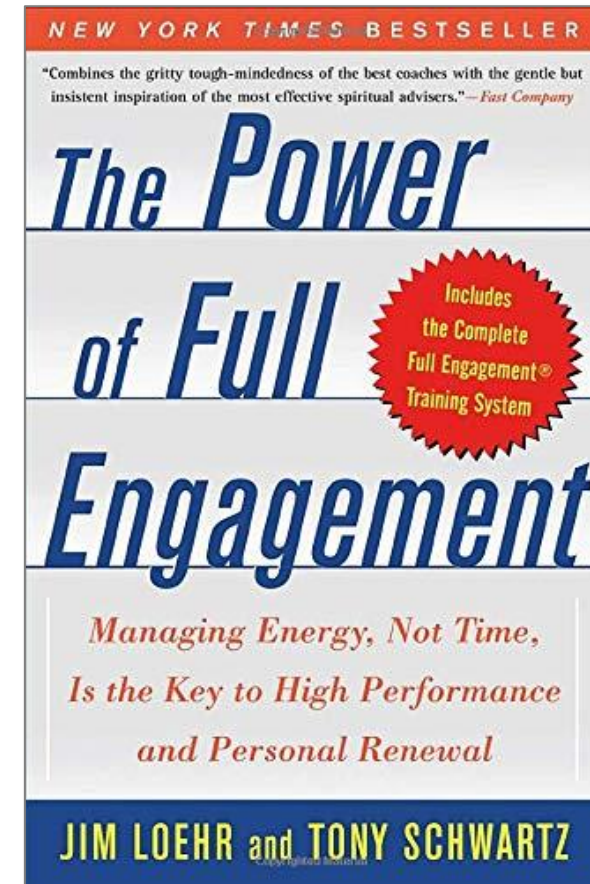
Managing time vs. Managing energy

- Under stress, many will work harder and longer trying to manage time. (some will quit, too)
- Time is a finite resource, and often not within our control.
- **Energy** is our capacity to work. It's how effective we are during the time we use.
- Unlike time, energy can be expanded by practicing specific behaviors that should eventually become unconscious rituals.



“Energy, not time, is the fundamental currency of high performance.”

“The goal is to build the necessary capacity to sustain high performance in the face of increasing demand.”





Let's level-set with a quick energy management self check.

True or False...





I wake up still feeling tired and fuel my day with food or caffeine.



I work several hours straight until I get tired.



I schedule myself back-to-back all day.





I frequently get “hangry.”



I occasionally feel hungover from drinking too much.



Sometimes I have a “food coma” after eating a big lunch.





I worry about the future and/or dwell on the past.



I often feel unmotivated or procrastinate too much.





I get easily distracted at work by personal stress or relationship problems at home.



I spend too much time on social media in the middle of the day.

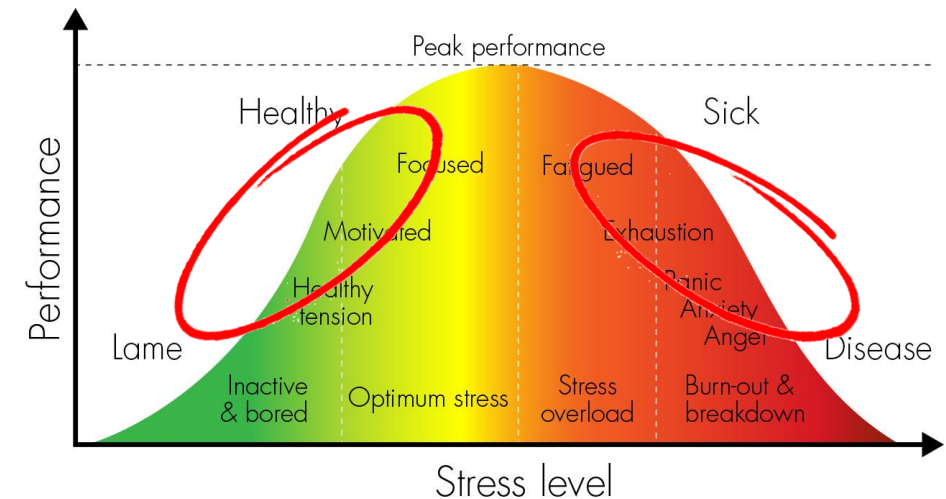




Did you answer “true” to any of these?

Failure to manage energy can result in:

- Reduced focus and memory
- Loss of motivation and engagement
- Errors, accidents/injuries
- Irritability, anxiety, mood swings
- Loss of confidence
- Physical symptoms: increase BP, sleep disruption, fatigue
- Substance use, overeating, compulsive behaviors





Strategies for Managing Energy

Sources of Energy



Physical: Nutrition, sleep, exercise, rest.



Mental: Realistic optimism, creativity, time management



Emotional / Social: Social skills and connections, self-confidence, challenge, self-control, empathy



Spiritual / Purpose: Values, motivation, passion, courage, conviction, integrity, honesty

Sources of Energy



Physical



Mental



Emotional /
Social



Spiritual /
Purpose



90 - 120 Minute Ultradian Rhythm

Rapid Recovery Rituals

We need **long-term** strategies and **daily** rituals that use the 4 sources of energy to help us recover throughout the day:

1. After 90 minutes of continuous focus
2. As soon as we sense signs of fatigue, irritability or exhaustion



Physical



Mental



Emotional /
Social



Spiritual /
Purpose

Energy Balance Sheet

What drains your energy each day?	Rapid recovery rituals.	
•	Physical	Mental
•	•	•
•	•	•
•	•	•
•	•	•
•	Emotional	Spiritual
•	•	•
•	•	•
•	•	•
•	•	•



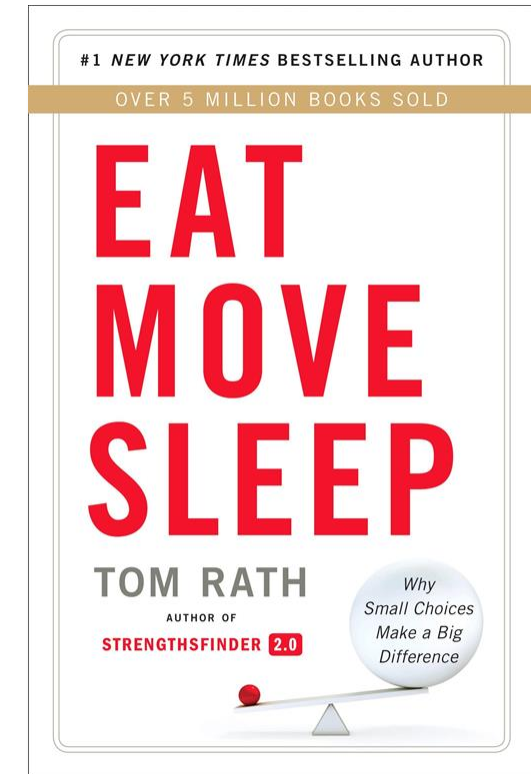
Long Term Strategies for Energy Management

Balancing energy use with energy renewal

Physical Energy Building Rituals

Nutrition, sleep, exercise, rest.

1. 7 hours of sleep. Go to be early, get up early.
2. Nutrient dense, low carb diet. Small meals with healthy snacks.
3. 150 minutes of moderately intense exercise per week.
4. Drink plenty of water throughout the day.
5. Healthcare: preventative care and managing chronic illness.



Mental Energy Building Rituals

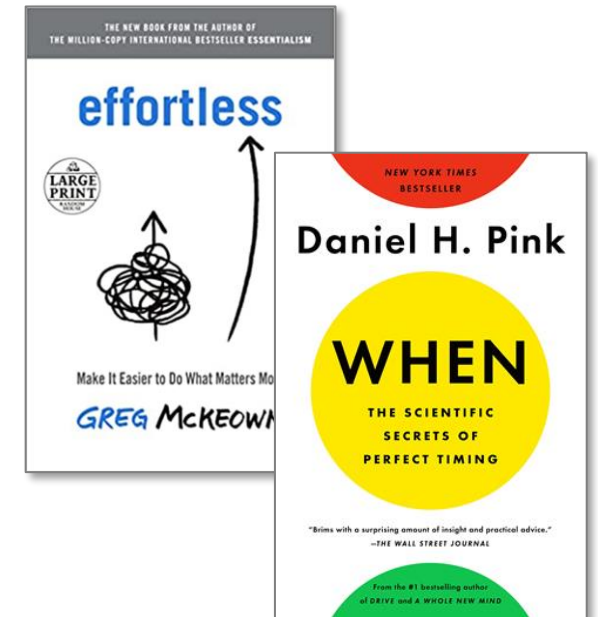
Realistic optimism, creativity, time management

1. Take breaks at least every 90 minutes. Find time to “shut off” every day.
2. Find the heaviest thing you can pick up and carry it.
3. Close your day on a good note. Reflect on accomplishments and prep for tomorrow.
4. Manage your space, time and technology. Segment stop/start times and non-scheduled activities like emails. Don't multi-task.

Deep work in the morning: high energy, analytical tasks.

Inner work mid morning: strategic and dynamic activities once your brain has slowed down.

Tactical work in the afternoon: rote and mundane.



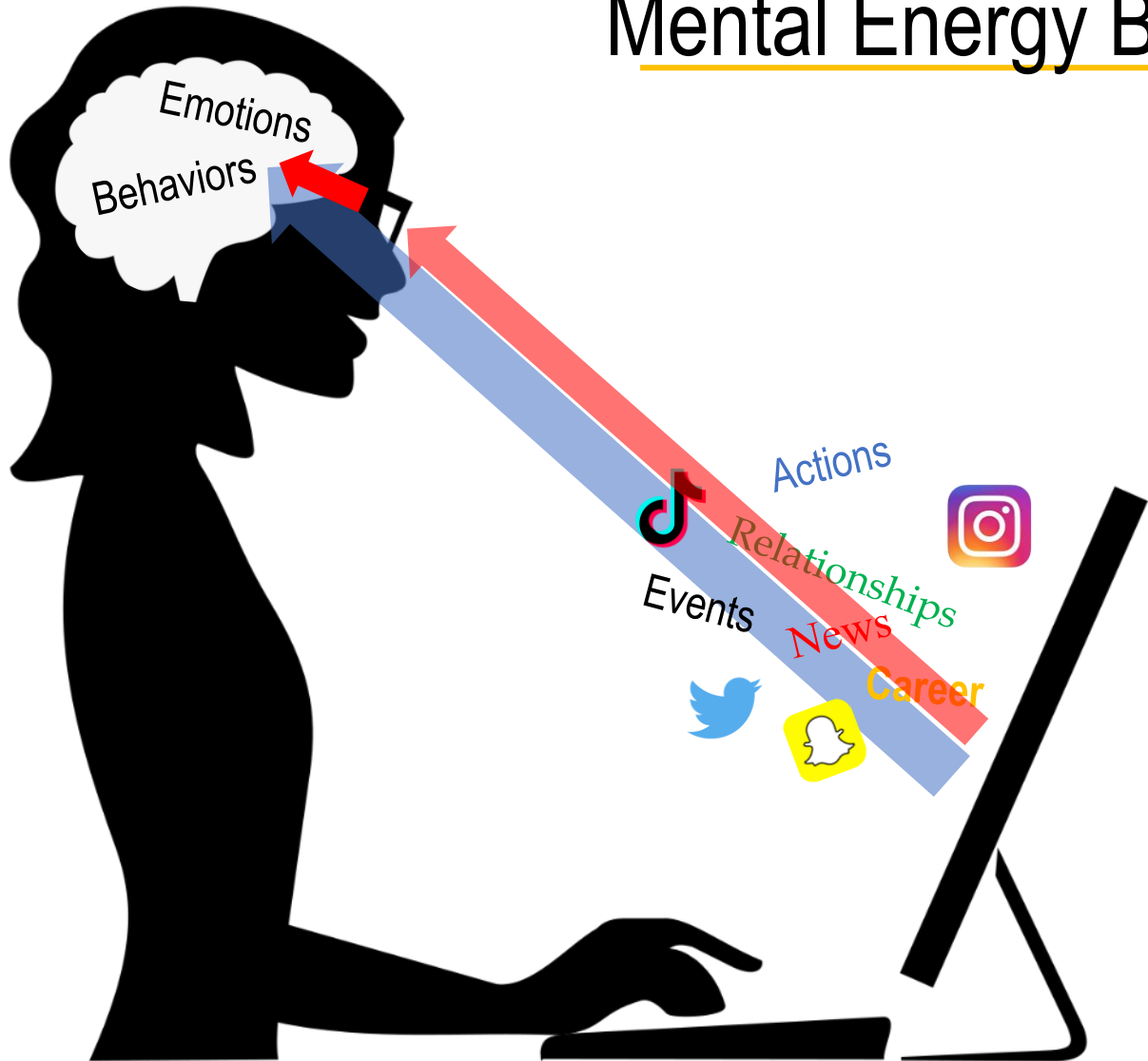
Emotional Energy Building Rituals

Social skills and connections, self-confidence, challenge, self-control, empathy

1. Choose your emotion. Slow down. Put a little space between what happens and how you choose to react.
2. Invest time in things you enjoy (and that make you, you).
3. Build your empathy muscles. Express recognition and appreciation.
4. Nurture and repair relationships.
5. Master your self-talk



Mental Energy Building- Self-talk



Counter our tendency toward a negative, irrational mindset.

- Focus on things you can control.
- Be where your feet are. Stay present-focused.
- Avoid making assumptions.
- Don't catastrophize. Find the positive.
- Balance self-reward with self-criticism.
- Remember that nothing is perfect.

The more we practice using our filter, the more hard-wired our responses become.

Thought Log

Event	Emotion / Behavior	Thought or “self-talk”	Identify the irrational thought	Counterstatement- new healthier thought
Received “constructive” feedback from my supervisor on a project I’ve been working on.	Disappointed. Sad. Anxious about job performance.	<i>“Nothing I do is right. I’m going to job fail. I am not qualified for a job at this level.”</i>	Overgeneralization. Catastrophizing. All-or-nothing thinking. Perfectionism: I must be perfect and always look competent.	<i>“I’m not perfect. I’m still learning. Coaching can be hard to hear, but it will help me improve. It’s all part of the learning process.”</i>

Spiritual Energy Building Rituals

Motivation, values, purpose, passion, courage, conviction, integrity, honesty

1. List your personal values.
2. Know your “why” and motivation (line-of-sight) for your choices and your job role.
3. List your passions and how they fit into your life (or don't).
4. Set personal in addition to work goals.



Energy Building Accountability Log

Make a list of energy building rituals that include all 4 sources of energy (physical, mental, emotional and spiritual). Rate yourself daily (1- not successful, 5 very successful). Add notes about obstacles and learning moments.

Ritual	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Notes

Energy Building Accountability Log

Make a list of energy building rituals that include all 4 sources of energy (physical, mental, emotional and spiritual). Rate yourself daily (1- not successful, 5 very successful). Add notes about obstacles and learning moments.

Ritual	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Notes
<i>Call mom during drive 1-2x / week.</i>								
<i>Set timer on phone to get up.</i>								
<i>Pack healthy snacks.</i>								
<i>Finish bottle of water.</i>								
<i>Check in with college friends.</i>								
<i>Log off by 5:00pm</i>								
<i>Exercise before work 5x / week.</i>								
<i>Random IMs to team daily.</i>								
<i>Visit values list daily.</i>								
<i>Write in journal 5 minutes daily.</i>								
<i>In bed by 10:00pm</i>								

Additional learning resources

- Totalhealth.cat.com > A-Z Library
- Handout
- Energy Audit
- Accountability log
- CI example slides
- WD training and materials: Emotional Intelligence, Viewpoint Diversity, Growth Mindset

Leader Tips

Leaders' role in managing team energy

Every organization goes through periods of high demand and increased stress, which often give teams an opportunity to challenge themselves and grow. But prolonged, unpredictable periods of stress can have a negative effect on team performance, engagement and individual health.

Often, organizations respond to demanding times by working more hours or hiring more people. While this may be necessary, ensuring individuals are effectively managing their energy can also help overall team effectiveness.

Energy refers to our capacity to work. It is normal to go through periods— even throughout our days— where we encounter stress and deplete our energy. When this happens, we are less effective and engaged with our work. Individuals can build rituals behaviors that renew energy and recover. Leaders also have the ability to manage teams in a way that helps rebuild energy and restore the team to full engagement.

According to psychologist Jim Loehr, there are 4 sources of energy: Physical, Mental, Emotional and Spiritual. Here are some things leaders can do that tap into these sources and help renew team energy.

1. Clarify the individuals' and the team's purpose. Instill a clear line of sight from your work to Caterpillar's strategy and goals.
2. Reinforce our Values as the foundation of our strategy and the basis for how we relate to each other.
3. Encourage work breaks after 90 minutes of continuous work that include healthy snacks, water and social interaction. Be a good role model.
4. Implement and avoid...
5. Be considerate...
6. Avoid unne...
7. Reach out...
8. Use time d...
9. Model auth...
10. Build confi...
11. Demons...
12. Include all...
13. Set challer...
14. Know your...

Energy Audit

Energy crisis? Check the statements below that are true for you.

at least seven to eight hours of sleep, and I often wake up feeling tired.
akfast, or I settle for something that isn't nutritious.
igh (meaning cardio-vascular training at least three times a week)
breaks during the day to truly renew and recharge, or I often eat lunch at my desk, if I eat it at all.
ing on one thing at a time, and I am easily distracted during the day, especially by e-mail.
day reacting to immediate crises and demands rather than focusing on activities with longer-term value
time for reflection, strategizing, and creative thinking
as or on weekends, and I almost never take an e-mail-free vacation.
self feeling irritable, impatient, or anxious at work, especially when work is demanding.
time with my family and loved ones, and when I'm with them, I'm not always really with them.
for the activities that I most deeply enjoy.
ents and blessings.
ly allocate my time and
ise of my own purpose

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Construction Industries (CI) Global Meeting Guidelines

PURPOSE

- Outline best practices for organizing meetings, especially with global participants whose first language is not English
- Improve CI employees work-life balance by better managing meetings across time zones, locations and language barriers

SCHEDULING A MEETING

Before Scheduling, Ask Yourself The Following:

- What is the purpose of the meeting and do you have a preliminary agenda?
- Is this meeting necessary?
- Have you selected the right participants and

Running A Meeting

Preparing For A Meeting:

- Average our meeting platforms (e.g. Teams) to improve the quality of the meeting

Safety First

Be prepared to act with safety. Regardless of location, apply the same safety principles used at all Caterpillar facilities.

<h4>WORKSPACE</h4> <p>FREE OF TRIP HAZARDS This is the leading cause of injuries at home</p> <p>EMERGENCY REMINDERS Know your emergency number, where to take cover and how to evacuate</p> <p>SET UP ERGONOMIC WORKSTATION Be considerate of people in front of you, not all at once Use a keyboard, mouse, and chair with backrest</p>	<h4>PERSONAL</h4> <p>TAKE MENTAL & PHYSICAL BREAKS Stand up for 10 minutes every hour and move around Establish working hours, virtual coffee and lunch breaks Call a coworker and turn your webcam on Take a walk, stretch, get moving</p> <p>BE MINDFUL OF OUR GLOBAL TEAM Be considerate of global time zones Try to avoid early morning or late evening meetings Try to avoid Friday evening and weekend meetings Share meeting agendas for breaks and screen share time Review more Global Meeting Guidelines on ci.ct.com</p>	<h4>CYBER</h4> <p>PROTECT INFORMATION Use Report Phishing button for suspicious emails Never share your credentials Connect to VPN weekly for software updates Label material with the correct confidentiality</p>
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Employee Assistance Program (EAP)



What is EAP?

Personal support for a variety of challenges, before they impact your lives at work or at home.



What is the cost?

There is no cost to use the EAP



Who is eligible?

Regular full and part time Caterpillar employees and their eligible family members.*



Is it private?

Yes. EAP is completely confidential. No one at Caterpillar will ever know you have used the EAP.



What is provided?

- Clinical assessment, counseling, referrals
- Information, consultation and referrals
- Organizational support



For leaders

Most employees self-refer to EAP. But leaders can play an essential role in helping employees get support by making EAP referrals.

* Local eligible of family members will vary. Check with your HR representative.

Accessing EAP



By Phone

N. America and general information

+1.866.228.0565

+1.309.820.3604

Global access numbers can be found at CaterpillarEAP.com



Online

CaterpillarEAP.com

Local contact numbers.
47 languages.

Or through our benefits portal
EAP.cat.com



LifeWorks App*

For iOS, Android and
Blackberry

* Uses CWS single sign on.



Onsite

EAP counselors are available onsite in many locations.
Learn more at EAP.cat.com.



Q&A