

BOUNDARIES: SAYING "NO" WELL & FOCUS MANAGEMENT ASSESSMENT

Instructions

Setting boundaries at work is based on five key elements. Self-assess where you are on these five elements and learn where you can grow to feel confident in setting and maintaining boundaries at work.

Answer the below questions with the 5-point scale and choose the rating you agree with most for each question. Calculate your total score.

5=Very much like me
4=Like me
3=Neutral
2=Unlike me
1=Very unlike me

1. I know what my needs are to be energized at work.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

2. I always know my priorities to ensure I spend time doing the right work.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

3. I always think through my response to ensure my "no" or "not now" is delivered tactfully.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

4. I always take breaks to manage my energy.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

5. I always clearly understand how I spend my time at work.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

6. I intentionally build joy into my work to keep my energy up.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

7. I am always self-aware of my emotions and thoughts.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

8. I am comfortable speaking up for my needs at work.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

9. I know my workload, so I always know when I can say "yes" and when I need to say "no".

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

10. I can easily give estimates on deliverables.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

11. I am very aware of the emotions and motives of others.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

12. My needs are equally as important as the needs of others.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

13. I always plan the time needed to complete my work so that I never over-commit.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

14. I always prioritize how I spend my time to ensure I have time for what I value.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

15. I ensure my needs are met before saying “yes” to others.

1 Very Unlike Me

2 Unlike Me

3 Neutral

4 Like Me

5 Very Much Like Me

Answer Key

Calculate your total score from the questions above and find the corresponding category.

Score: 55-75 Clear Boundaries

You have a clear understanding of how you spend your time at work. You know when you have room to add things to your schedule or when you might have to set a boundary and say “no” or “not now”. You respect your needs and do your best to meet the needs of others by re-prioritizing or giving others an estimate of when you can meet their need. You know your values and do your best to ensure you make time for what you value and your priorities. Openly talk about your approach to boundary setting at work. Consider training others on time management, prioritization, and energy management so they know when it’s a “yes” and when it’s a “no”. Help others to create scripts on how to say “no” well.

Score: 34-54 Boundaries in Progress

Knowing when you need to say “no” is half the battle. If you ever wonder if you should say “yes” or automatically say “yes”, it might be a sign that you need more data to make your decision. **Helpful Tip:** Try estimating the time needed for your current prioritized work and proactively add that time to your work calendar. This gives you a visual of your workload. Next time someone asks you if you can add something to your workload, check your calendar first. Where will the new task fit? How long will it take? Is this new task a priority over the other items in your schedule? Answer these questions first before answering “yes” or “no” or “not now”. That way, your “yes” or “no” is based on respecting your current availability.

Score: 15-33 Developing Boundaries

You know you need to create boundaries at work if you are consistently overwhelmed, resentful, or burned out. Prioritizing all the tasks and projects you are currently responsible for is a good first step. Use the [Eisenhower Matrix](#) to prioritize tasks and ensure you are spending your time doing the right work. Estimate the time needed for your current prioritized work and add that time to your work calendar. This gives you a visual of your workload. Identify the boundaries you need to set for your well-being. Consider boundaries around hours per week working or working on the weekends. Once you have a clear picture of your workload and boundaries, discuss both with your boss. Identify possible solutions for how to address any over commitments you have made. Who could be pulled in to help with meeting deadlines? Is there someone who can help with weekend work? Can the deadlines be pushed back? Can projects be re-prioritized? Ensure you have a plan for avoiding over-committing your time in the future. Practice the conversation you plan to have with your boss. No matter what job you have, setting boundaries at work is necessary, so start now.

This assessment measured five attributes that predict the behaviors needed to set clear boundaries with your team.

Time Management (Questions 9, 10 & 13):

I know my workload, so I always know when I can say “yes” and when I need to say “no”.
I can easily give estimates on deliverables.
I always plan the time needed to complete my work so that I never over-commit.

Energy Management (Questions 1, 4 & 6):

I know what my needs are to be energized at work.
I always take breaks to manage my energy.
I intentionally build joy into my work to keep my energy up.

Answer Key Continued

This assessment measured five attributes that predict the behaviors needed to set clear boundaries with your team.

Priorities & Values Awareness (Questions 2, 5 & 14):

I always know my priorities to ensure I spend time doing the right work.

I always clearly understand how I spend my time at work.

I always prioritize how I spend my time to ensure I have time for what I value.

Assertiveness (Questions 8, 12, & 15):

I am comfortable speaking up for my needs at work.

My needs are equally as important as the needs of others.

I ensure my needs are met before saying “yes” to others.

Social Intelligence (Questions 3, 7 & 11):

I always think through my response to ensure my “no” or “not now” is delivered tactfully.

I am always self-aware of my emotions and thoughts.

I am very aware of the emotions and motives of others.