Responsibility Summary

Adapted from Chapter 3 of Practical Productivity by Wayne Hedlund.

YOUR NAME	YOUR ROLE	DATE

Think of this as your work life laid out like a menu at your favorite restaurant. Everything is organized into clear sections so you can see what you've been doing at a glance. With this tool, deciding what to focus on stops feeling like solving a Rubik's cube in the dark.

Remember: this is not your to-do list. It's a big-picture snapshot of the things you work on regularly, the things you are working on now, and the things you will work on later.

How to build it

1. **Brain dump.** Set a timer for 30 minutes and list everything you do. Don't organize, don't judge. Ask yourself questions like, 'What would break if I didn't do it?' and 'What are people always asking me about?'
2. **Sort into the four buckets.** Your best guess is fine. If something could fit two buckets, put it where it makes the most sense to you and don't duplicate it.
3. **Add context and a size.** Just enough detail to make it clear — "Weekly sales reports," not "Reports." Then size it. Counting items tells you how many plates are spinning; sizing tells you how heavy they are.
4. **Reality check it.** Is this what you actually spend your time on? Are you leaving things out because they seem too obvious? This is about honest visibility, not the job description you wish you had.

> **SIZING KEY**
>
> **S — Small:** under 2 hours in a typical week
>
> **M — Medium:** 2 to 5 hours in a typical week
>
> **L — Large:** more than 5 hours in a typical week
>
> *For projects, size what a typical week looks like while it's actively moving. For projects that haven't started, estimate. Rough is fine — you're after a sense of weight, not a timesheet.*

1 Ongoing Responsibilities

The stuff that never ends — recurring work with no finish line. Daily operations, weekly meetings, monthly reports, quarterly events, annual audits, etc.

> **Reactive load:** _____ hours in a typical week
>
> *Before you list anything else, estimate the work that arrives unannounced each week — the walk-in, the phone call, the 'got a minute?', the thing that breaks. Put a number on it here so the rest of this page reflects your real capacity.*

RESPONSIBILITY	WHAT IT INVOLVES	HOW OFTEN	SIZE
Weekly sales reports	*Pull numbers, write summary, send to leadership*	*Weekly*	*M*

2 Current Projects

Work with a finish line that you are actively moving on right now. If you haven't moved it forward in the last couple of weeks, it likely belongs in bucket 3.

PROJECT	WHAT "DONE" LOOKS LIKE	TARGET	SIZE
New hire onboarding revamp	*Updated checklist + first group through it*	*Dec 15*	*L*

3 Upcoming Projects

The stuff that's coming for you or that you should be doing.

PROJECT	EXPECTED START	WAITING ON	SIZE
Office move	*This quarter?*	*Lease signature*	*L*

4 Wish List Projects

The someday-maybe pile. This is not a graveyard for dead ideas! It's a waiting room where good ones wait to get called.

PROJECT	WHY IT WOULD BE WORTH DOING	SIZE
Training videos for new hires	*Would cut the same five questions every month*	*M*

What to do with it

This document is only as good as what you do with it. Use it to manage your own workload — to see what you're already carrying before you say yes to one more thing. Use it to clarify your role, so the work you were hired for doesn't stay buried under the work that just showed up. And use it with your team, so people know what you're working on… or why you're not working on something else.

You might even consider asking everyone on the team to fill one out and bring it to a meeting. Comparing them side by side has a way of surfacing the duplicated work, the gaps nobody owns, and the person quietly carrying twice their share.

The perfect summary you never create is worth far less than the imperfect one you actually use.

Where this came from

The Responsibility Summary is Chapter 3 of *Practical Productivity: simple habits for busy humans*. It's the document that saved my sanity when I was drowning and couldn't explain why — and the book covers the rest of what sits around it: weekly planning, priorities, and a few other habits for busy humans. If this page helped even a little bit, the book might too. Available on *Amazon*.