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by Margaret M. Luciano

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With job resignations still up 23% above pre-pandemic levels, many organizations are short-staffed. When just a few employees resign, their workloads can usually be redistributed among the remaining employees. Indeed, resources abound to help managers fairly divide workload and to help employees manage the increased workload. However, as departments of 50 become departments of 35 and teams of 10 become teams of seven, workload redistribution is an untenable long-term solution.

In addition to redistributing work, there are a couple common solutions for staffing shortages: hiring replacement employees and outsourcing lower-level tasks. But amid the Great Resignation's persistent talent shortage, many managers are finding that their usual go-to solutions aren't enough. Here are three strategies for managers struggling with understaffed teams.

Rethink Project Calendars

One of the fastest ways to turn high performers into low performers is to allocate their time to so many different projects that they don't have time to think deeply. For example, in my work with a global insurance company, as the number of treasury managers dwindled, one historically high-performing treasury manager found herself spending 10% of her time on each of 10 major project teams — with no time to spare for her individual job responsibilities. The result was weekly calendars full of double-booked meetings, multiple frustrated teams, and poor results.

It's critical to prioritize projects and defer what you can. For example, does there *really* need to be a system upgrade every year, or is every other year actually fine? What you can't defer needs to be implemented more strategically and scheduled more carefully — preferably sequentially. If the treasury manager had four weeks allocated for each project, with a slack week in between for overages or previous project revisions, each of the 10 projects could have been accomplished within the year, and with two weeks to spare for some well-deserved PTO. Although it can be tempting to fight over scarce resources and demand your projects are the priority, as a manager, it's more important to get employees' focused effort rather than clock time. Stated differently, don't just grab for whatever you can get — help employees be their best.

Prioritize Core Client Needs

Traditional business teaching emphasizes the importance of having a diverse portfolio of clients and products to minimize risk and make your business stronger. Indeed, focusing on only a few big clients is potentially precarious. However, when you're in a situation where you can't manage your entire client base well, giving everyone a little may prompt important unsatisfied clients to move on.

It's a reoccurring theme across industries (e.g., investments, insurance, and health care) that the number of policies, customers, or patients that an employee is expected to manage has significantly increased — sometimes even doubling or tripling. For example, an asset manager I worked with at a multinational financial services company who two years ago was expected to call about 60 clients per week now has a client load of 246 per week. That comes out to fewer than 10 minutes per client with no time allocated for anything else, like meeting with new clients or conducting market research. No client was getting great service and the employee was working long hours and constantly under tremendous pressure. Unsurprisingly, they just accepted a new job.

Sometimes prioritizing clients involves firing clients, but there are less-drastic measures to try. For example, does every client really need a personal phone call every week, or might some be satisfied with a call every quarter accompanied by automated weekly emails or monthly newsletters? Also consider whether algorithms or even simple group sorting/filtering in Excel could be introduced to determine which client should be a priority on a given week — for example, those whose investments are currently experiencing market volatility. Ideally, a mid-range solution will be effective at reducing employee workload while maintaining your client base. But if not, you may need to prioritize your core clients over having a large portfolio of clients.

Find Quick Interventions

Look for interventions that can substantively improve employees' daily work and be mastered in less than a week. For example, are there ways to automate data entry, such as converting paper forms into electronic forms that clients enter themselves? Could teaching employees a few formulas in Excel or creating report templates save hours of manual computations? Could three levels of approval be reduced to one, or could the dollar amount requiring approval be increased? Could a shared document repository be used to save the project lead hours of integrating feedback from 10 people's emails?

Alternatively, if it's the less-frequent tasks — for example, monthly financial or operational reports — that are the bane of your employees' existence, try to make any process improvement interventions even shorter (ideally, a day or less). If you can, bring in external consultants or human resources to manage much of the design and rollout of the interventions to avoid further overwhelming an already overstretched workforce. Although investing in process improvement may be expensive, it's likely much cheaper than recruiting, training, and managing a revolving door of employees who are all frustrated by broken processes.

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Thanks to staffing shortages, many employees' workloads have increased to untenable levels. For the workplaces running on a skeleton crew, now is the time to implement process improvement interventions, prioritize your core clients and products, and assign your employees to fewer concurrent projects — not more.

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