



SOCIETY OF ACTUARIES

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Achieving Balance

by Tricia Matson

It was interesting to be asked to write an article about work-life balance. A few years ago I might have been asked to write about how to convince your boss you won't burn out, or how to check voice mail on vacation without irritating your spouse, but I doubt anyone would have come to me for advice on work/life balance. I worked in consulting then and still do. I am at a different firm, but the nature of my work has not changed very much. The big difference is my one-year-old son Owen, who has done a lot to put things in perspective.

Today's environment makes it very easy to become a workaholic. Companies are continuously pressured to operate efficiently, which frequently translates into doing more with fewer people. As a result, employees find themselves with an increased workload that can only be managed by working nights and weekends. In some instances, performance measurement is heavily weighted toward things that are objective and measurable, such as hours worked. The annual review forms I have seen usually include sections on work/life balance, but I don't think I have ever heard of someone getting a high rating because they were good at it.

Advancements in technology make it easier to work outside the office, but also translate into checking e-mail and answering cell phones late at night, on weekends or during vacations. Peer pressure is another significant factor—I can't help but feel guilty leaving work when my colleagues are still there (even if I come in early or work from home at night).

There are a few things that I have found particularly helpful in trying to keep life in balance:

1. Don't set your expectations too high

If your goal is to have perfect work/life balance, you are setting yourself up for failure. There are some people that think I do a good job of balancing my work life and my personal life (which is why I am writing this article), but there are definitely times I don't feel that way at all. The key is to hope to do a pretty good job of it, not miss too many deadlines, not miss seeing my family on too many days and try to find a little time for myself. The days I send a report out the door before 5 p.m. and make it to day care with a little extra time, I feel like I am succeeding. The days I drop my son off at day care even though he is sick because I have an important meeting, or the days I stay home with him and miss an important meeting, I don't feel like I am doing too well at all. But I try not to beat myself up about it. None of the things that go wrong are earth-shattering.

2. Work someplace good

I am lucky to work at a firm with many programs in place to help employees maintain a reasonable work/life balance. It doesn't mean that people work less hard; we all have the flexibility to work hard at a time and place that works for us. There is significant flexibility around time spent in the office, so if you need to come in late, leave early or work from home, it is generally not a problem as long as the work gets done. It is also fairly easy to get approval for a formal flexible work arrangement. I work four days a week, which has made it much easier to meet all my commitments. I am also lucky that I chose the actuarial field—my husband is a surgeon, which makes it pretty difficult for him to work from home!



Tricia Matson, FSA, MAAA is senior manager at Deloitte Consulting in Hartford, Conn.

pmatson@deloitte.com

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Flexible work arrangements and telecommuting are becoming more and more prevalent. They are great benefits employers can offer to attract and retain top talent. If you are not currently using these benefits, and are looking for ways to improve your work/life balance, it may be a good place to start. If your employer doesn't offer such alternatives, maybe you can help get something started.

3. Learn to say no

The single most important thing I have done to improve my work/life balance is force myself to let others handle things. It seems like an obvious way to work less, but for me it was (and still is) a significant mental challenge. In my prior job (and pre-Owen), I rarely turned down an additional opportunity (and frequently volunteered before being asked). I hated the thought of missing out on being part of a big new project, an important sales pitch or even an internal meeting. I loved to be in the thick of things.

Now, when a new opportunity arises and I am either considering volunteering or being asked to participate, I consider the impact it will have on my personal satisfaction overall, rather than just job satisfaction. Obviously there are many situations in which I am needed for a project, in which case I make it work. But there are also many occasions for which I am one of many potential additions to a team. It can be hard to pass up the opportunity to learn something new, work with someone new or travel somewhere new. But if it means I'm going to spend weeks missing my family, or feeling guilty, or having little time for myself, it's probably not right for me.

4. Exercise

This may seem counterintuitive. Obviously exercise takes time, and therefore takes time away from work and family. But the benefits

outweigh the drawbacks. Exercise is good for your long-term health and gives you more energy in the short term. It is a great stress-reliever, and for me, is one of the few times I can just think. I think the biggest benefit is overall improved mental health, which is an important part of staying in balance.

5. Write everything down, preferably in one place

There is no way I could keep track of everything I need to get done, both at work and at home, if I didn't carefully maintain my calendar and to-do list. If you are a technophile, it is even better to use an electronic version that will beep at you with reminders of when something is due.

Most people have calendars and to-do lists at work, but it can be a big help to keep one at home as well. After several years of forgetting dentist appointments and rushing out to buy birthday presents at the last minute, I have gotten in the habit including personal events in my work calendar as well. As critical as having one is updating it every time you finish something or add something new, and looking at it at least once a day. This is all probably obvious, but it is amazing how easy it is to let this slide.

It is also helpful keep in mind that the reason people have to work at maintaining balance is because of all the great things they have going on—family, friends, job. The need to achieve work/life balance isn't a chore, it's a privilege. □

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