WORKSHOPSKILL · FACILITATION KIT

The Energy Audit — Facilitator Run Sheet

Folder: `the-energy-audit` · Category: self-assessment · 1–2 people · 15 min · offline + online · print props · tool pack

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CONTENTS

Objectives
Setup
The card
Variations
Put it on the wall
Agent version
Read the marks
Failure modes of the debrief
When to use this activity
How to run it
Failure modes
Facilitation notes
Props in this folder
How to run this debrief
The eight debrief questions

15	1–2	print props
MINUTES	PEOPLE	SETTING

The Energy Audit — Facilitator Guide

You cannot redirect a week you cannot see. List the recurring things you actually do, mark each one by what it does to your energy — gives (+), drains (–), neutral (=) — then find the biggest drain you keep choosing and the biggest + you keep skipping, and commit to one dated swap. An energy audit is not time management; it is noticing what your time costs and returns.

How this differs from `the-not-anymore-list`: The Not-Anymore List stops items by asking a team "if we weren't already doing this, would we start it today?" — it audits *the work*. This audits *what the work does to you*: the unit is your energy, not the calendar, and a "+" item is protected, never cut. Run the list when the team's workload is the question; run this when your own fuel is the question.

Objectives

By the end of the activity, participants will have:

1. Mapped a real week — every recurring thing they actually do, marked + / – / = without deliberation.
2. Named the biggest drain they keep choosing anyway and the biggest plus they keep cutting when it gets busy.
3. Committed to one dated swap — one – dropped, halved or batched, one + added back — said out loud.

When to use this activity

- Someone is busy all week and cannot say what any of it cost them — the blur is the problem, not the schedule.
- Before designing a role change, a redistribution of work, or a "we'll do less" promise — audit the current week first.
- As a standing 15-minute weekly pulse: mark and spot only, and watch whether a single – ever moves.

Setup

Clock: fifteen minutes for the full run. Solo, it is the same fifteen; in pairs, each person runs their own audit, then the read-aloud takes five more.

Space: a desk. This tool deliberately fits next to a laptop — the list comes from the calendar and the inbox, the marks come from the body.

Materials per person:

Item	Source
3 × sign cards — gives (+), drains (–), neutral (=)	`the-energy-audit-prop-cards.pdf`
3 × prompt cards — "the drain I keep choosing", "the + I keep skipping", "one swap + date"	`the-energy-audit-prop-cards.pdf`
1 × list surface — sticky notes, or the blank backs of the sign cards	`the-energy-audit-prop-cards.pdf` print page
1 × pen	the first mark is the honest one; no erasing ritual

Grouping: 1 person. It works solo on a desk, or as a pair who each run their own audit and then read the pattern aloud to the other.

Roles: solo, you are both auditor and auditee; in pairs, the listener's only job is the one question — "what are you trading it for?"

How to run it

Time	Phase	Facilitator does	Participants do
0–5	List	"Every recurring thing in a normal week — meetings, tasks, rituals, the autopilot ones. Activities, not outcomes."	Write each recurring thing on its own note
5–9	Mark	"Don't deliberate. A 'should be + but is –' counts as –."	Put +, – or = beside each item
9–12	Spot	Lay out the two prompt cards. "The biggest – you keep choosing anyway. The biggest + you cut first when it gets busy."	Circle exactly two items — those are the finding
12–15	Swap	Demand the date and the out-loud version. "Drop, halve, or batch the –; add back the + — smallest survivable size."	Commit one swap in front of the partner (or out loud to yourself)

Then run the debrief — see `the-energy-audit-debrief.md`.

The card

Three sign cards keep the alphabet of the audit in view — + gives, – drains, = neutral — and three prompt cards step the hard part: naming the chosen drain, admitting the starved plus, and writing the swap with a date on it. The swap card is the reason the deck exists at all: an audit that ends in insight instead of one dated experiment is people-watching with extra steps.

Failure modes

1. **The list is outcomes and obligations, not activities.** "Reporting" drains nobody; "the Tuesday status call" does. Rescue: go concrete — one event per note.
2. **The marks get deliberated.** Three minutes on one item means the honest answer is being negotiated. Rescue: first mark stands; no re-marking.
3. **Everything is a –.** That is a mood, not a map. Rescue: "what did you do twice last week that cost almost nothing and didn't grind you down?" Start from there.
4. **The swap is a wish list.** Ten changes is none. Rescue: one –, one +, one date — that is the whole commitment.

Variations

- **Weekly pulse:** run just the mark + spot phase on one recurring day each week; watch a single – finally move.
- **Before a role change:** audit the current week first — you cannot design the next one until you have seen what this one costs.

- **Pair cross-read:** each person reads their biggest – and + aloud; the partner asks “what are you trading it for?” — the question you won’t ask yourself.
- **Online:** the list lives in a shared doc, the marks are emoji; the read-aloud stays live on a call. The pattern still has to be said out loud, not just seen.

Facilitation notes

- Honest, not impressive. Mark what you actually do and actually feel, not the version you would show a manager.
- A drain you keep choosing is a decision. Name what you are trading it for — that is where the leverage is.
- One swap. A list of ten changes is a wish; one dated change is an experiment.

Put it on the wall

Print `the-energy-audit-activity-poster.pdf` (A3) to keep the two rules — mark what is true, swap one with a date — in view while the week gets mapped.

Props in this folder

- `the-energy-audit-prop-cards.pdf` — poker-spec print sheet (63.5 × 88.9 mm, bleed and cut guides): three sign cards (+ · – · =), the chosen-drain card, the starved-plus card, the swap-and-date card, blank faces, branded backs
- `the-energy-audit-guide.md` — this run sheet
- `the-energy-audit-debrief.md` — the debrief questions and the failure modes of the debrief
- `the-energy-audit-run-sheet.pdf` — the print edition: this run sheet + the debrief, bound as one A4 document with bookmarks
- `the-energy-audit-activity-poster.pdf` — the whole tool on one A3 wall sheet: the run, the two rules, the watch-outs
- `the-energy-audit-start-here.md` — one page, thirty seconds, then print and go
- `SKILL.md` — machine-readable manifest for AI agents
- `*-Letter.pdf` — US Letter editions of the print documents

Agent version

Every file in this folder has a stable public URL — an AI agent can fetch the cards, the debrief and this run sheet with three curl commands (see `SKILL.md`). The paper version needs nothing but a desk, some sticky notes and six cards.

The Energy Audit — Debrief

> Nobody is drained in the abstract — the debrief is where a page of + / – / = turns into one dated swap worth testing.
>
> Use with `the-energy-audit-guide.md`. The swap phase at minute 12 is the compressed version; this sheet is the full one.

How to run this debrief

- Keep the marked-up week on the table — the two circled items visible. The finding is a pattern, and patterns need to stay in view.
- Let them sit with the – column in silence first. Out loud, the first defence of every drain is always “it’s required.”
- Close on the swap card: one –, one +, one date. If the swap cannot be stated small enough to survive a busy week, it is not a swap — it is a wish.

Read the marks

- Look at the – column without talking. Which drains are genuinely required, and which are just habitual?
- Is your biggest – something you’d defend if a stranger asked why you do it? If not, why is it still on the list?
- Which + did you mark late, as if you had to give yourself permission? That’s the one you’ve been starving.
- Does the pattern match how you *describe* your week to others, or does it disagree? The disagreement is the finding.

The eight debrief questions

1. The trade.

“What are you trading to keep this drain? Say it in one sentence — ’I keep it because…'.”

→ Targets: turning a drift into a decision. If the trade can be named, it can be renegotiated.

2. Decision or momentum.

“If you can’t name the trade — is this a decision, or momentum you never re-made?”

→ Targets: the difference between a choice and a default; most unexamined – items fail this question.

3. Halve instead of drop.

“Could it be halved or batched instead of dropped, so the trade is still honored but smaller?”

→ Targets: the survivable version of the swap. Full deletion dies in week two; a halved drain keeps the promise it was protecting.

4. Who would notice.

“Who would notice if it went — and would that be load-bearing, or just the first thing anyone saw?”

→ Targets: separating real dependencies from visibility anxiety.

5. The smallest plus.

“What is the smallest version of the + you’re adding back — so small it survives a busy week?”

→ Targets: restoration sized to reality. The starved plus starved because it was scheduled at full size.

6. The two-week read.

“How will you know in two weeks whether the swap helped, tired you out, or changed nothing?”

→ Targets: an honest pre-registered outcome — including “nothing,” which is data, not failure.

7. The pull-back.

“What will you say to yourself when old momentum pulls the – back onto the list?”

→ Targets: rehearsing the relapse, because it will come; the swap card’s date is the anchor.

8. The concrete swap.

“What exactly will you do differently, on which day, starting when?”

→ Targets: the commitment in calendar form. “Less meetings” is a mood; “Thursday’s standing call, dropped, from next week” is a swap.

Failure modes of the debrief

Failure mode	Why it happens	The rescue
Everything is a drain	You’re listing outcomes and obligations, not activities	Go concrete — “the Tuesday status call,” not “reporting.” Nobody drains you in the abstract.
Not a single + on the page	The small ones got skipped	“What did you do twice last week that cost almost nothing and didn’t grind you down?” Start there.
The swap is too big to survive	Three – deleted, a two-hour + added	Halve both sides — one small subtraction, one tiny restoration. A swap you keep beats a plan you abandon.