

Microsoft Workplace Analytics solution for teamwork playbook

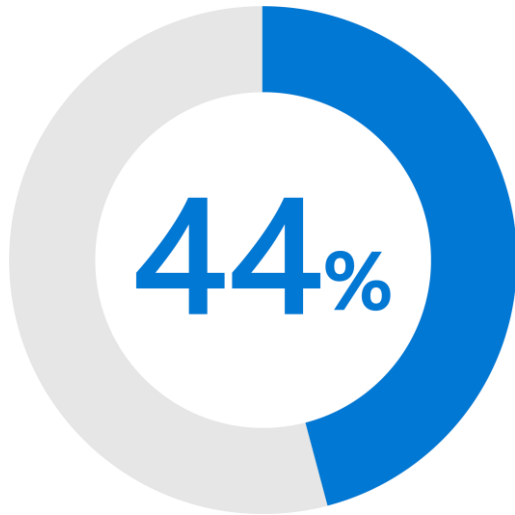


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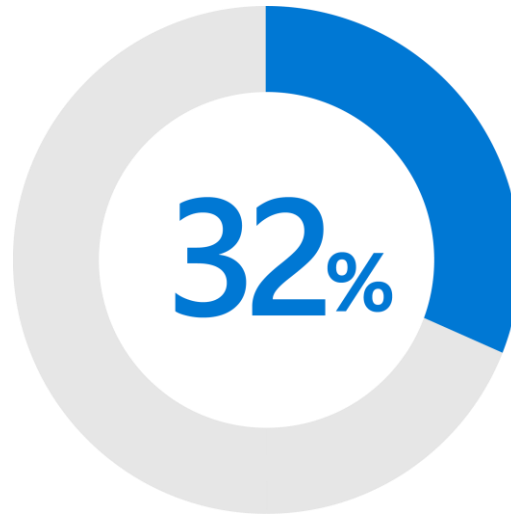
Teamwork norms impact productivity and engagement

Collaboration is often inefficient



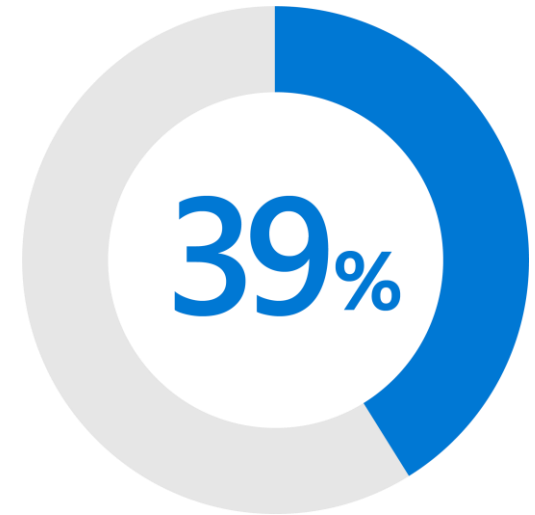
of meeting time is seen as unproductive

Focus time is hard to find



set aside time daily for focused work

Work interferes with personal time



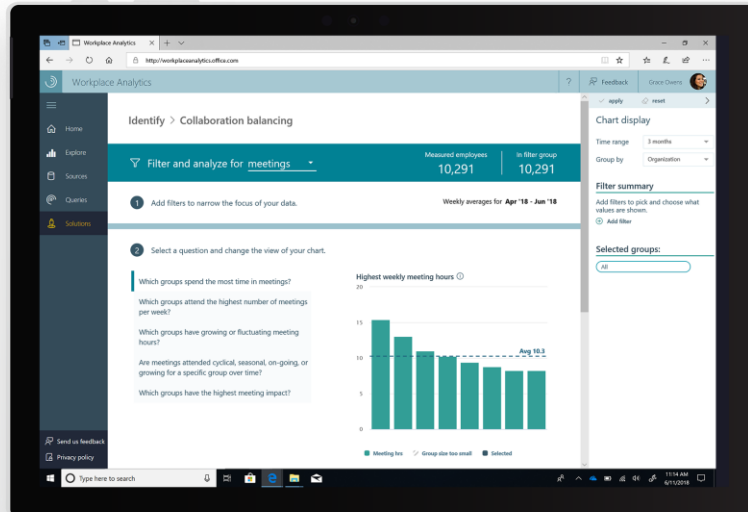
say that work disrupts personal/family time at least once a week

Three steps to transform teamwork



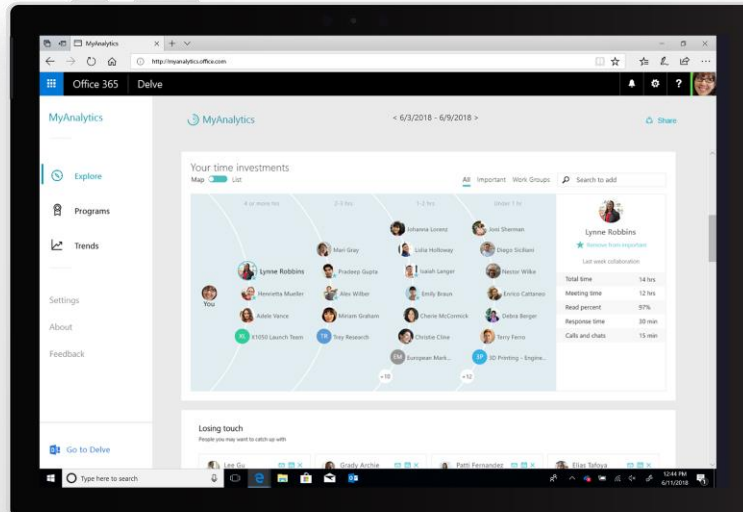
Discover opportunities

Use collaboration data to discover challenges like meeting overload and after-hours work



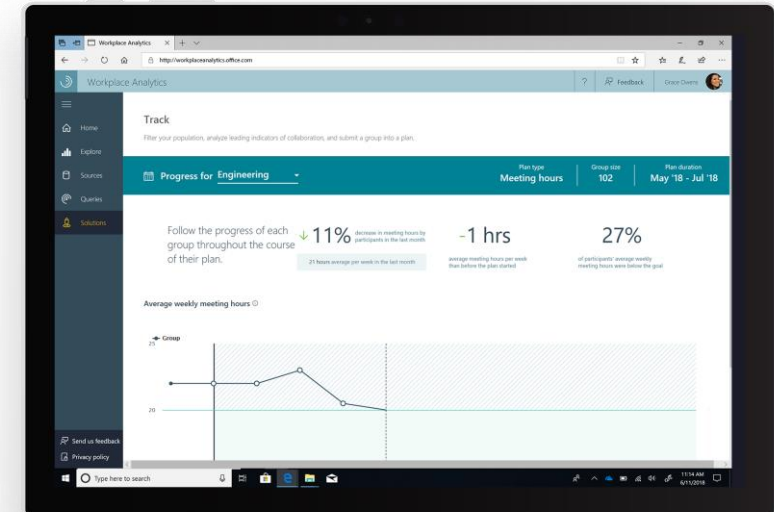
Empower teams to change

Enroll teams in change programs that deliver productivity insights and nudges powered by MyAnalytics

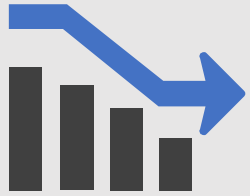


Measure and improve

Measure team habits as they change over time, then iterate and improve



Case study: major bank frees up 10K hours per year and cuts after-hours work



Reduced meeting
hours by

10%

"I've started to think more critically about which meetings I attend"



Grew focus
Hours by

12%

"Basic things like bringing agendas to meetings helped us get more focus time"



Decreased after-hours
meetings by

20%

"Now I feel more comfortable declining low-priority meetings"



Freed up over

10K

hours per year on team
of 100 employees

"I'm more aware now of the bad habits I need to work on"



**Change takes the whole team.
Data creates a common language.**

“You can’t manage something you don’t measure. This solution has allowed us to measure our team’s effectiveness... We now account for every hour of the work week.”

– Manager, Oil & Gas company

Welcome to teamwork solution

You are playing a critical role in bringing people together in order to drive the culture change goals of your organization. You will help teams build good habits together and keep each other accountable during the program in order to succeed.

In your capacity, you will be learning from ongoing analyses, identifying opportunities for improvement, managing the improvement actions, and tracking the impact of those actions.

This playbook is designed to guide your through the change process at a high level, but is not designed to replace your experience, business knowledge, or favorite change methodology.



Teamwork solution overview



Workplace Analytics



MyAnalytics

Discover opportunities

Measure and improve

Empower teams to change

Teamwork solution sample program timeline

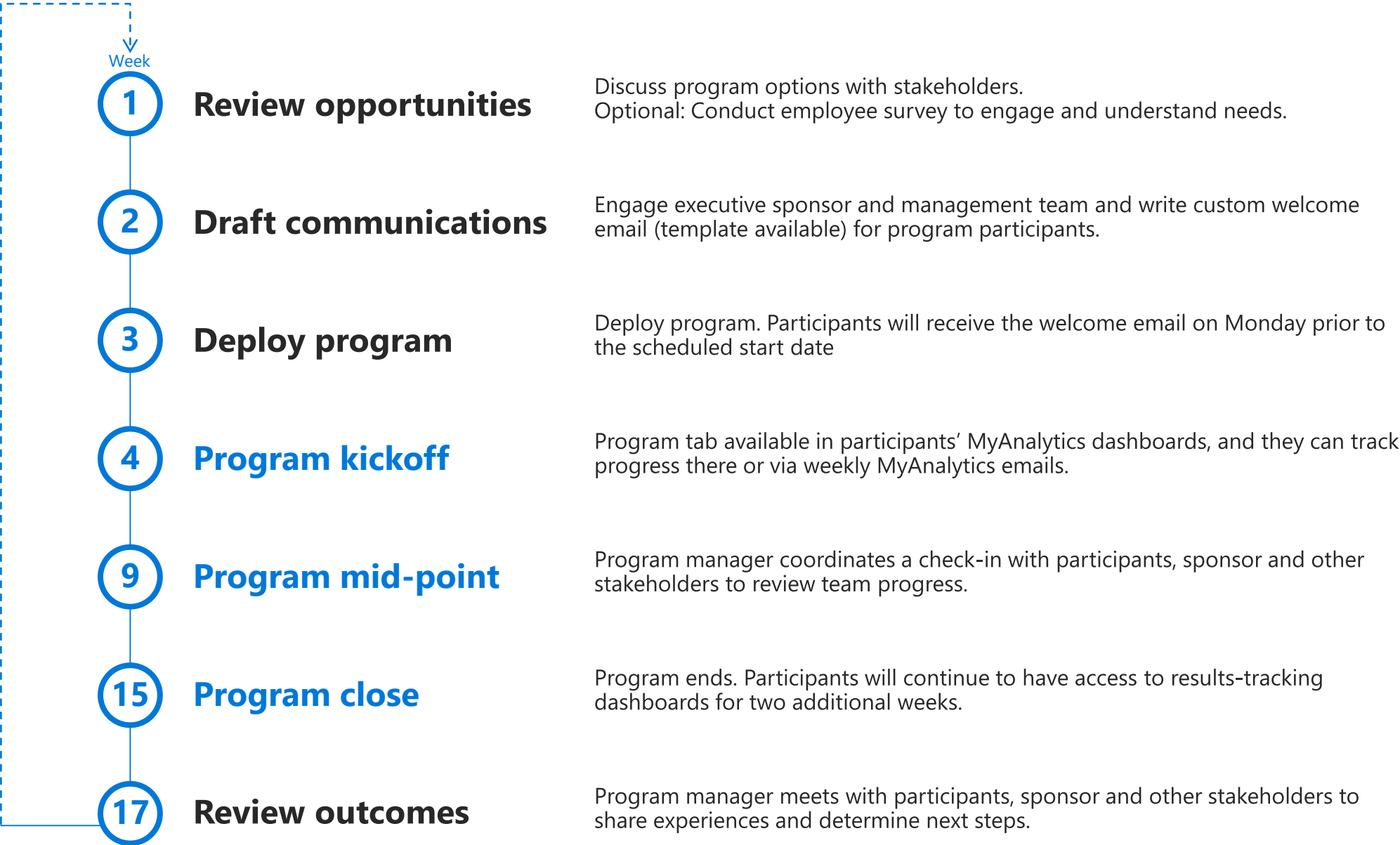
Duration:

17 weeks

Prerequisites:

Complete Workplace Analytics (WPA) onboarding

Complete MyAnalytics onboarding



Step 1: Explore opportunities for change in your organization

Steps	Tips
Identify and choose tools you will use to drive change in your organization	<p>Use Workplace Analytics Solution queries to diagnose and identify an opportunity</p> <p>Alternatively, you can use manual upload in Solutions based on the output of qualitative approach (surveys, emails, etc.)</p>
Understand organization's goal and timing opportunities	<p>Look for natural program starting points (e.g., a new team was formed, a new project is commencing, etc.) and create urgency</p> <p>Understand your goal – is it to get buy in for additional change management programs or is it for immediate and scalable improvement?</p>
Build your team	<p>You don't have to do this alone: get a communications person to help you as well as inform your Office 365 admin of this initiative as you'll need to make sure your participants have MyAnalytics licenses assigned to them</p> <p>Ensure participants have access to a supportive business sponsor (as they may look for 'permission' to change their habits)</p>

Step 2: Get buy-in and use the WPA solution feature to set up a program

Steps	Tips
Define goals for improvement	Acknowledge existing company culture and team/individual priorities and help participants work with those, instead of trying to ignore them
Select habits	<p>As a change leader, suggest habits and make sure all participants are committed before making the final selection.</p> <p>Best practice is to set up a meeting where you can come together as a group on which habits to work on</p> <p>See pages 17-23 for sample worksheets and habit glossary</p>
Set program context by configuring welcome mail	Page 20 has a sample mail; the Solutions tool provides you an email template, but we encourage you to customize it further to best fit your organization's needs

Step 3: Run and track programs

Steps	Tips
Schedule a check in every 2 weeks with group participants to review progress and identify issues, resolve as appropriate	<p>Encourage informal group/buddy chats to discuss progress and assist with challenges</p> <p>When people get stuck, remind them to 'Think globally, but act locally' (i.e., take action where you can)</p> <p>Utilize your communications team to ensure engaging and inspiring mid-program notes (sample coming soon)</p>
Review results with participants	<p>Ask questions like what did you get out of the program, what would you do differently</p> <p>Discussion guide and survey sample (coming soon)</p>
Send summary and ROI analysis to the sponsor and managers	Sample summary report (coming soon)

Frequently asked questions

Q: How big should the program be?

A: Program can be large, however, check ins are most effective when done in smaller groups (10-15) and led by managers. This provides enough for a variety of opinions, but small enough for everyone to be heard and supported

Q: What's the point of program check ins with participants?

A: The purpose of this meeting is to connect program participants, establish and enable a support structure, and reflect on progress to date.

Q: What if we aren't seeing change in behavior?

A: Change takes time and seeing updated metrics is one of the ways to measure progress. Other customers have been successful by using surveys and regular check ins to measure progress qualitatively as well as watching the numbers.

Q: Where do I learn more about MyAnalytics and how do I educate program participants about it?

A: MyAnalytics helps you find opportunities to build better habits and get back in control of your time. It uses everyday data from Office 365 to give you insights into how you spend your time. It then provides insights and tips that help you work smarter. [Learn more](#)

Resources

Technical Resources

Workplace Analytics Set Up: <https://go.microsoft.com/fwlink/?linkid=2002303>

MyAnalytics Set Up: <https://go.microsoft.com/fwlink/?linkid=2005209>

Solutions Set Up: <https://docs.microsoft.com/en-us/workplace-analytics/tutorials/solutions-intro>

Learn how you can most effectively adopt MyAnalytics:
<https://go.microsoft.com/fwlink/?linkid=2005405>

Build your team

Role	Purpose	Time Commitment
Executive Sponsor	Lends support to pursue culture change goals, signs off on welcome email	2-4 hours over 16 weeks
WpA Analyst	Identify opportunity	4-8 hours before program starts
Program Manager	Set up program, goal, configure welcome email	5-10 hours before program starts, 1 hour weekly for duration of program, 2-3 hours for post mortem
O365 Tenant Admin	Licensing alignment (ensure that everyone in the program has a MyAnalytics and Workplace Analytics license assigned)	2 hours before program starts
Participants		Depending on frequency of check ins: 3-6 hours total for duration of the program
Communications leader (optional)	Review communications to participants	2 hours before program starts

Help Participants Select & Agree to Habits (Optional)

Worksheet 1: Which goal is most important to you?

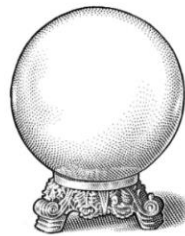
Circle one goal, assume you have achieved it, look into your crystal ball, and describe your new reality.

My goal is to...

Reduce My Meeting Hours

Reduce My After Hours

Increase My Focus Time



My new reality...

1

Ask participants to discuss and define good teamwork, and the goals associated with it. Then, ask each participant to complete Worksheet 1 to document their goals (from the available three).

Habits to choose for After hours reduction (Pick 3)

Habit Title	Description
Reschedule meetings	Postpone during regular work hours when most attention are here.
Turn off mobile notifications	It's tempting to respond immediately, but off work and before notifications to notify.
Only respond during lunch	Can I wait until morning? Not colleagues may be.
Book ahead for the afternoon	Try to control it your office. Book 30 minutes in.
Postpone your schedule	Postpone your schedule from when you're available to.
No work laptop work	Avoid checking email from things in the morning.
No work on your phone	Remove email apps from your phone to minimize.

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Habits to choose for Focus time increase (Pick 3)

Habit Title	Description
Schedule focus time	Proactively book time in your calendar to get work done without distractions.
Protect focus time	Don't let meetings take over. If a new meeting conflicts with your scheduled focus time, consider the urgency of the meeting and if it can be rescheduled.
Set intention for focus time	Outline what tasks you want to work on during your focus time beforehand so you can jump right in.
Coordinate team focus time	Schedule focus time as a team. Agree not to organize meetings and to limit interruptions during that time.
Minimize distractions	Turn off mobile notifications and set your Skype setting to 'Do not disturb' during focus time.
Try time blocking	Break up your focus time into smaller chunks to work on specific tasks. Studies show that this is an effective way of getting work done.
Review and reflect	Take a moment after your focus time to reflect on accomplishments and which tasks may need more time.
Take breaks	Short mental breaks keep you fresh. Try taking at least two 15 minute breaks each day.

2

Give each participant a one vote (shown here as red dots). Choose one goal for the whole team based on the vote results and ensuing discussion.

Worksheet 2: Decompose your goal into actions and results

What cues, routines and rewards will help you achieve your goal? (Complete the sentences in each box)

My goal is to: (copy from Worksheet 1)		
When... (Cue)	When... (Cue)	When... (Cue)
I will... (Routine)	I will... (Routine)	I will... (Routine)
This will provide me with... (Reward)	This will provide me with... (Reward)	This will provide me with... (Reward)

3

Ask each participant to complete Worksheet 2 to identify behavior changes they need to make to achieve their team goal.

Worksheet 3: Translate your routines into habits to track

Match your routines to measurable habits available in the Teamwork Solution.

My goal is to: (copy from Worksheet 1)		
I will... (Routine) (copy from Worksheet 2)	I will... (Routine) (copy from Worksheet 2)	I will... (Routine) (copy from Worksheet 2)
↓	↓	↓
Habit Title: (goal from Slide 7, 8 or 9)	Habit Title: (goal from Slide 7, 8 or 9)	Habit Title: (goal from Slide 7, 8 or 9)

4

Ask each participant to complete Worksheet 3 to match these behavior changes with habits that can be tracked with Solutions.

Habits to choose for Focus time increase (Pick 3)

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Take breaks	Short mental breaks keep you fresh. Try taking at least two 15 minute breaks each day.

5

Vote again (3 votes/participant). Choose three team habits based on results and discussion.

Worksheet 1: Which goal is most important to you?

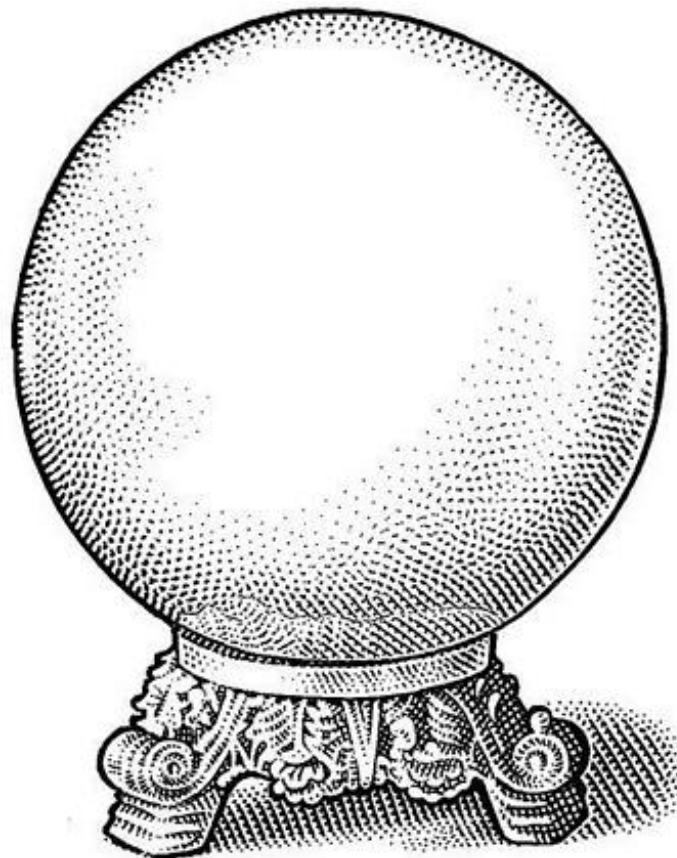
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When... (Cue)	When... (Cue)	When... (Cue)
-----	-----	-----
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This will provide me with... (Reward)	This will provide me with... (Reward)	This will provide me with... (Reward)

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<p>Habit Title:</p> <p>(pull from Slide 7, 8 or 9)</p>	<p>Habit Title:</p> <p>(pull from Slide 7, 8 or 9)</p>	<p>Habit Title:</p> <p>(pull from Slide 7, 8 or 9)</p>

Habits to choose for Meeting Hour Reduction (Pick 3)

Habit Title	Description
Decline optional meetings	If you want to stay informed, consider requesting meeting notes instead.
Limit back-to-back meetings	Consecutive meetings can be draining. Try to schedule 15 minute breaks between meetings to recharge.
Consolidate meetings	If meetings have similar attendees or goals, consider combining agendas to save time.
Divide and conquer	Consider splitting up meetings you share with peers when only one of you needs to attend.
Review recurring meetings	Recurring meetings can become stale over time. Adjust meeting length and frequency based on current need, and try to write an agenda for each occurrence.
Delegate attendance	Consider delegating meetings to members of your team based on roles and requirements. Request summaries if you want to stay informed.
Prioritize with your manager	Ask your manager for help prioritizing meetings when you're overloaded.
Reschedule when necessary	If key decision makers and stakeholders are not able to attend, reschedule so you don't have the same meeting twice.
Meeting prep	Protect five to ten minutes before meetings that you need to prepare for.
Proactively resolve conflicts	Don't wait until the last minute. If important meetings conflict, ask organizers to reschedule.
Schedule focus time	Proactively book time in your calendar to protect time you need to get work done.
Shorten meetings	Try scheduling 45 or 25 minute meetings to increase efficiency and save time.

Habits to choose for After hours reduction (Pick 3)

Habit Title	Description
Reschedule meetings	Find time during regular work hours when most attendees are free.
Turn off mobile notifications	It's tempting to respond immediately. Turn off email and Skype notifications to mentally recharge.
Only urgent emails	Can it wait until morning? Your colleagues may feel obligated to respond to your requests after hours.
Book email time in the afternoon	Stay in control of your inbox. Book 30 minutes to catch up on email before leaving work.
Share your schedule	Help colleagues know when you're available so they can respect your time offline.
No email before work	Avoid checking email first thing in the morning. Wait until you get to work to open your inbox.
No email on your phone	Remove email apps from your phone to eliminate temptation to respond.

Habits to choose for Focus time increase (Pick 3)

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Schedule focus time	Proactively book time in your calendar to get work done without distractions.
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Take breaks	Short mental breaks keep you fresh. Try taking at least two 15 minute breaks each day.

Welcome Email

Sent from: Microsoft on behalf of your organization

Subject line: Welcome to your meeting reduction program

Configuration
in WPA tool

Messaging

Provide the name of the sponsor for this program. This will be included in the welcome message that will be sent to all participants.

This is the subject line of the welcome message. Use the default subject provided or write your own.

Edit the provided welcome message or compose a new one. The message will be sent to participants one week prior to the program's start date and will be available in their MyAnalytics dashboard.

Important: If someone has opted out of receiving emails from MyAnalytics, they will not receive the welcome message.

Business sponsor

Nestor Wilke

Message subject

Meeting reduction program

Welcome message

Hello,

We believe that time is your most valuable resource, and in order to help you make the most of it, we've designed a new initiative called Meeting reduction. Our goal is that over the next 12 weeks, you will spend less time in meetings so that you'll have more time to focus on your most important work.

Program set up

Details Messaging Habits

1 2 3

Program details

All program participants will see this name in their MyAnalytics experience.

Enter an email address for the primary contact that participants can reach out to with questions about the program.

The earliest a program can start is two Mondays from today's date. Welcome emails will be sent one week prior to the program's start date. All programs are 12 weeks long.

Program name

Meeting reduction

Program contact email

debra.berger@contoso.com

Week starting

Sun, Jul 22, 2018 to Sat, Oct 13, 2018

MyAnalytics

Hi Jessica Cohen,

Your company has invited you to participate in a program using MyAnalytics to improve work culture

A note from Nestor Wilke

Hello,

We believe that time is your most valuable resource, and in order to help you make the most of it, we've designed a new initiative called Focus on Focus Time. Our goal is that over the next 12 weeks, you will have more free time to focus on important work.

We'll be leveraging a new tool called MyAnalytics that uses data from your everyday applications to help you better understand your work habits. You'll receive a weekly summary email from MyAnalytics and have access to a personal insights dashboard. The data you see in the dashboard and email is only for you; nobody else has access to your personal data.

Here's what you can do to make the most of this program: Visit the MyAnalytics dashboard to understand the program goal and the recommended habits to help you succeed. Do your best to adopt the shared habits in your day-to-day work and encourage others in the program to do so. Check your dashboard each week to see the group's progress, since we win and lose as a team.

If you have any questions, please feel free to email debra.berger@contoso.com

Thank you in advance for your participation. We are looking forward to a successful program!

How it works

Your program starts on Monday, May 14

Know your goal

Your goal is to increase your focus hours by 10%. For you, this means more than **19.7 focus hours** each week

Track your progress

Check in each week to see how you're doing

Build new habits

Review recommended habits to help you meet your goal

Get started

Questions?

Contact debra.berger@contoso.com

Thank you for reading and good luck!