Workplace Analytics

Collaboration Overload Playbook

Your guide to Workplace Analytics' 5-step process
for addressing collaboration overload.

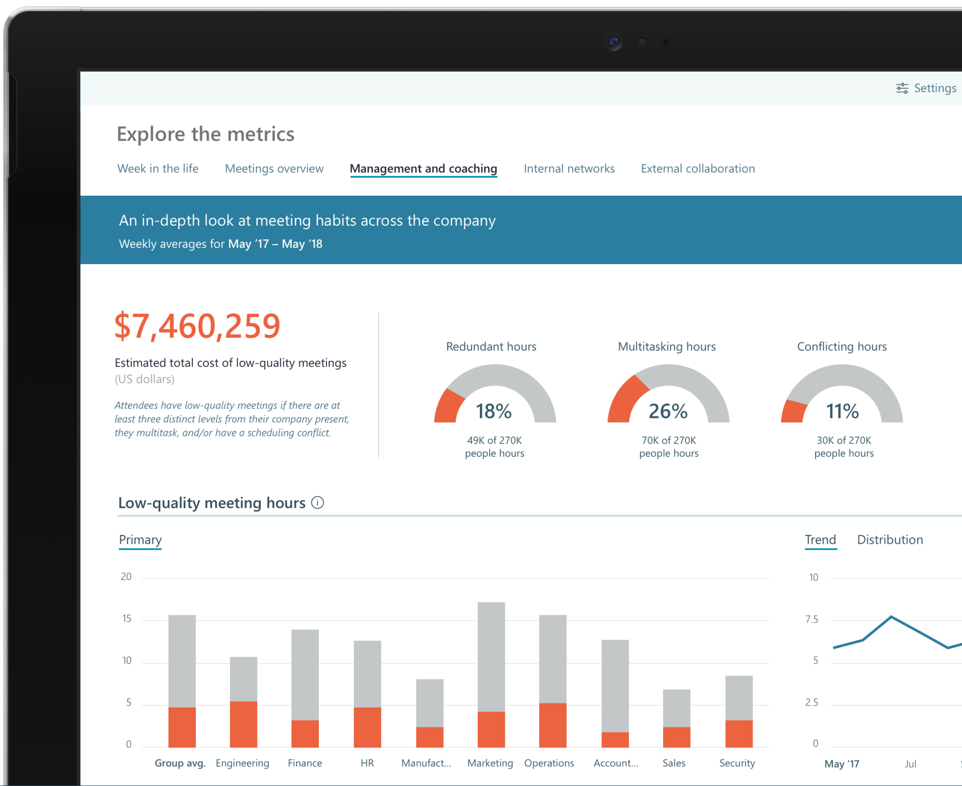
Define

Explore

Diagnose

Change

Measure



Workplace Analytics enables your organization to develop informed strategies around changing organizational collaboration behavior and improving business outcomes.

Office 365

Microsoft

Contents

Introduction

All organizations strive for a productive, innovative, and engaged workforce with a healthy work/life balance. And yet many organizations experience meeting bloat, out-of-control mailboxes, and extended workdays that waste valuable employee time, reduce engagement, and stifle organizational agility. Collaboration overload reflects one or more interrelated organizational issues, such as lack of role clarity and individual empowerment, poor email and meeting norms, working across time zones, and burdensome internal and external processes.

With tools to quantify the size and areas most affected by over collaboration, this playbook can help pinpoint the underlying causes. Microsoft Workplace Analytics enables your organization to develop informed strategies around changing organizational collaboration behavior and improving business outcomes.

Demonstrable employee benefits of a change management program that lower collaboration overload will improve employee empowerment, engagement, and work/life balance. Ultimately, the organization benefits from greater employee productivity, a more agile workforce, reduced deliverable schedules, and increased employee retention. This Workplace Analytics playbook offers a five-step process for quantifying, diagnosing, changing, and measuring progress toward lower collaboration overload.

Target audience

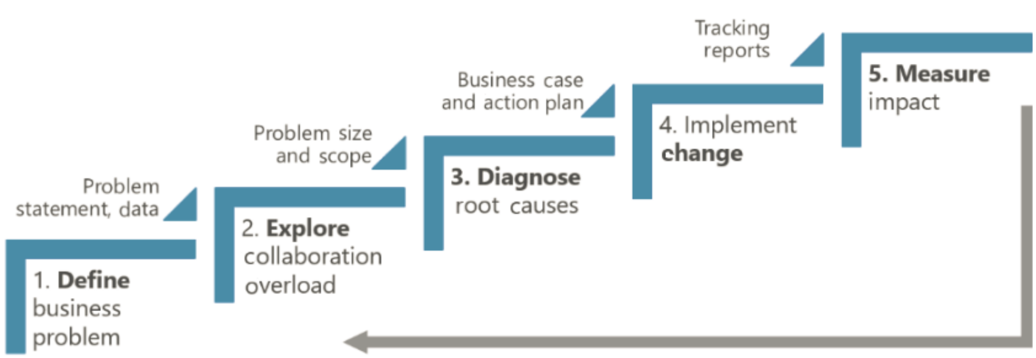
This playbook is intended for parties involved in diagnosing and managing collaboration overload problems within organizations. Typically, two primary roles are actively involved in change programs.

Analyst: The analyst quantifies and diagnoses the collaboration overload problem, and then use that analysis to create the business case for change, as well as inform the action plan. After the action plan is implemented, the analyst will likely be responsible for tracking the progress of change, based on metrics of interest to the organization.

Change Management Practitioner: This person is accountable for the implementation and success of the change management program. The practitioner wants to understand the root causes of collaboration overload and implement change with specific actions, as described in this playbook.

The process

This playbook guides you through the five-step process of analyzing and addressing collaboration overload with Workplace Analytics.



Process for addressing collaboration overload with Workplace Analytics

1. **Define the business problem**: The first step is to define the collaboration overload problem you want to change and decide what data you need to help analyze the problem and support the change.
2. **Explore collaboration overload**: In this step, the analyst explores the data, by using the Workplace Analytics Explore pages to understand the size and nature of the problem and identifies where in the organization the collaboration overload problem resides. The causes of collaboration overload are likely to vary across divisions, functions, and regions.

3. **Diagnose root causes**: After the affected groups of employees are identified, the analyst can diagnose the root causes of collaboration overload for each, guided by the suggested problem statements and corresponding analysis, which is listed in this playbook. Informed by current business literature and academic studies, this playbook provides a solid foundation upon which to develop your own custom analysis. By the end of this step, the analyst should be able to create a business case for a collaboration overload change management program.
4. **Implement change**: An action plan in the form of training, communications, and time management tools (such as MyAnalytics), is used in this stage to drive organizational change. Each problem statement diagnosed in the previous step can be associated with a recommended set of actions. Note that the change management program itself is typically outside the scope of the analyst's responsibility.
5. **Measure impact**: After the change management kicks in, tracking the reduction in meeting and email hours and after-hours work provides a leading indicator of future improved business outcomes, such as greater productivity, employee engagement, and retention.

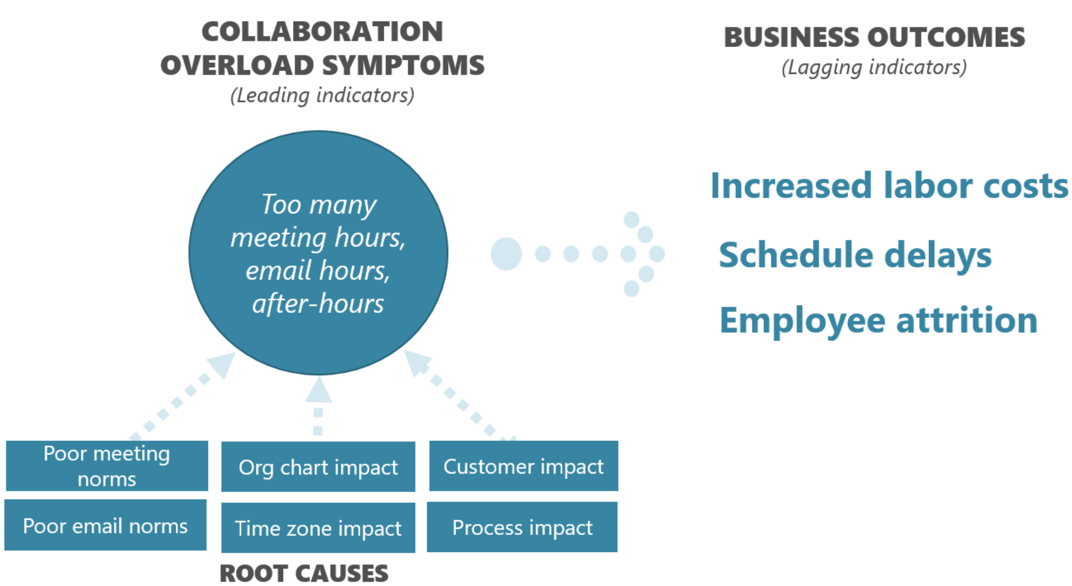
Before you start

Before you proceed further with this playbook, familiarize yourself with the basics of Workplace Analytics. You can explore the following to learn more:

- Product Overview
- Getting Started with Workplace Analytics
- Explore the metrics
- Data sources
- Create queries

Step 1: Define the business problem

Leading indicators of collaboration overload include too many meeting hours, too many email hours, and too much after-hours work. The root cause of collaboration overload is a combination of one or more interrelated organizational issues, such as lack of role clarity and individual empowerment, poor email and meeting norms, working across time zones, and burdensome internal and external processes.



Collaboration overload: the business problem

Collaboration overload leading indicators point to negative business outcomes (lagging indicators) for your organization, such as the following:

- **Increased labor costs**: Work doesn't get done between meetings and emails, generating more full-time employee requests.
- **Schedule delays**: Slow decision making, and reduced agility slow down the pace of organizational deliverables.
- **Employee attrition**: Stressed and disempowered employees make it difficult to retain and recruit quality employees.

Solving the problem of collaboration overload ultimately leads to increased employee productivity, a more agile workforce, shortened deliverable schedules, and improved employee retention.

Data considerations

As you embark on your Collaboration Overload analysis, consider what segments of your employee population would be useful to examine. For example, managers and individual contributors typically exhibit significantly different collaboration patterns, so an HR field that captures the Manager-Individual Contributor distinction will be useful in the analysis. HR fields that are useful during a collaboration overload analysis are listed in the section below. Further discussion of non-HR fields, which reflect business outcomes and are useful for making the business case for change, are also discussed in this section.

Recommended data

In combination with required attributes, the following human resources fields will be useful in accounting for variances in employee collaboration:

- Organization, e.g. division or department
- Level
- Region
- Time zone
- Manager/Individual Contributor Flag
- Function
- Employee status: Exempt, Non-exempt, Contractor
- Teleworker Flag
- Tenure
- Number of Direct Reports

The value of optional data

To build your case for addressing collaboration overload, it can be useful to link some of the Workplace Analytics metrics reflective of collaboration overload with business outcomes. At the employee level, these might include employee engagement survey responses, performance ratings, and High Potential (HiPo) employee indicators. For the Customer Impact root cause, it can be useful to link the time investment in individual customers with a data source reflecting the Sales or Revenue numbers for the customer.

Sample Workplace Analytics finding

Managers in IT are spending 30+ hours per week in meetings; they have an additional 15+ hours in meetings on their calendars that are double booked. Their direct reports spend only eight hours per week in meetings.

The data suggests

- IT managers need to empower and delegate more to their direct reports.
- IT managers are slowing down decision-making processes.

A more solid case with optional data

By using optional data such as delivery schedules or employee engagement, and then tying the Workplace Analytics metrics to specific outcomes, you can make this finding more meaningful:

- These over-collaborating IT managers have direct reports with a 20 percent lower engagement score.
- These over-collaborating IT managers deliver products behind schedule twice as often as their non-over-collaborating counterparts.

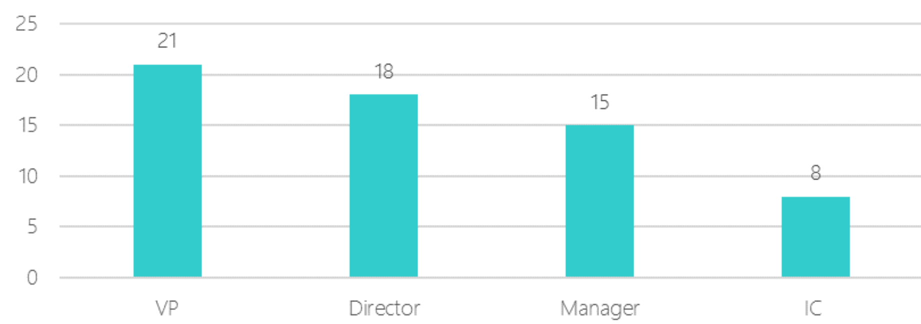
Quantify the problem

In looking at collaboration overload, it's useful to determine the deviation of any metric of interest from an *organizational benchmark*. A second approach is to compute the deviation of a metric from a group that represents *best practice*, be it a productive team, a set of engaged employees, or a successful sales unit.

Organizational benchmark

To gain the most useful insights, it's important to take care in determining what represents an appropriate benchmark. Consider the following when identifying an organizational benchmark:

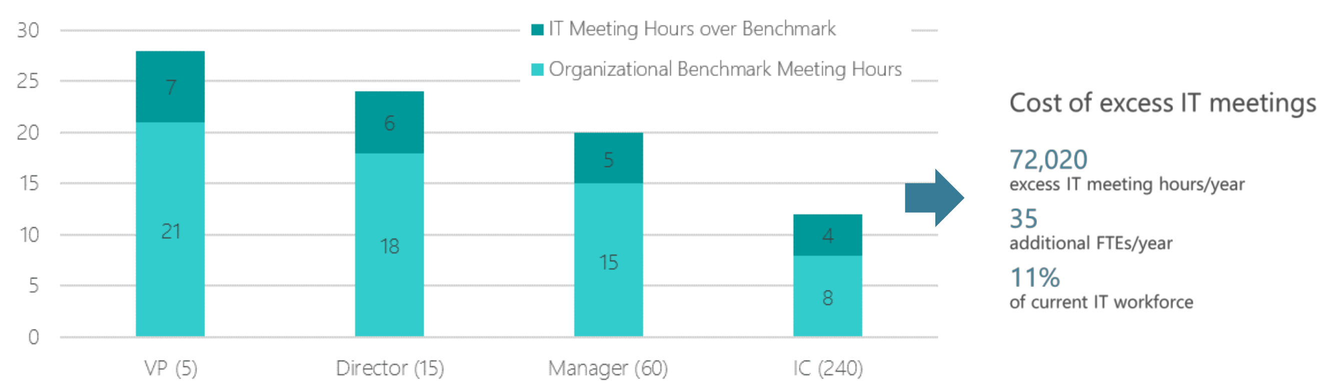
- Filter out any employees who should not be included in the organizational benchmark. Examples interns, contractors, and part-time workers.
- Ensure that the time frame selected to represent the benchmark is sufficiently long to account for any cyclical/seasonal variations.
- The benchmark measure itself should consider acknowledged variations in role: a simple example would be a cross-organization benchmark based on level, including Vice President and above, Director, Manager, and Individual Contributor (IC).



Organizational benchmark average for meeting hours per week, which excludes part-time workers, contractors, and full-time employees

After you choose a benchmark, you can use it to quantify costs of significant deviations.

In this example, the Information Technology unit (320 employees) is experiencing a significant amount of time over the benchmark in meetings. To quantify the problem, the cost of lost productivity from possible excess meeting hours is computed by using the organizational benchmark.

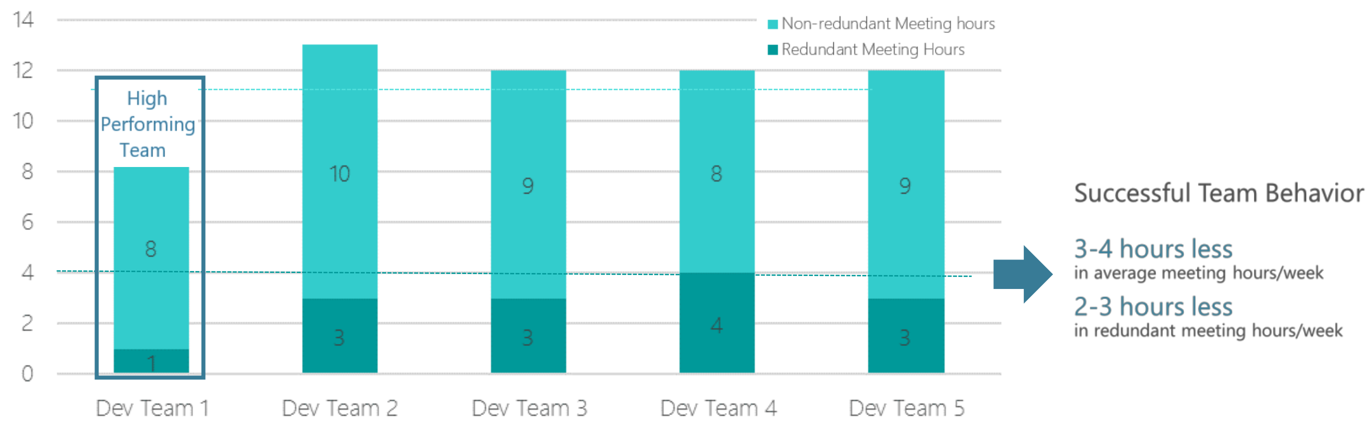


Information Technology experiences a loss in productivity equivalent to 11 percent of its workforce from excess meeting hours

Best practice

You can use a variety of business outcomes to identify groups that represent *best practice* or a positive business outcome. These could include groups representing highly engaged employees, High Potential (HiPo) employees, effective sales people, successful product development teams, or any other applicable measure of positive outcome.

This example shows the comparison of meeting hours grouped by redundancy and by overall meeting hours for five development teams, to identify significant deviations from the collaboration patterns of the successful team.



High performing Development Team 1 exhibits significantly different meeting behaviors as compared to other development teams

Step 2: Explore the problem

To execute or measure the impact of a collaboration overload initiative, start with a baseline of the current state of collaboration for the organization(s) of interest.

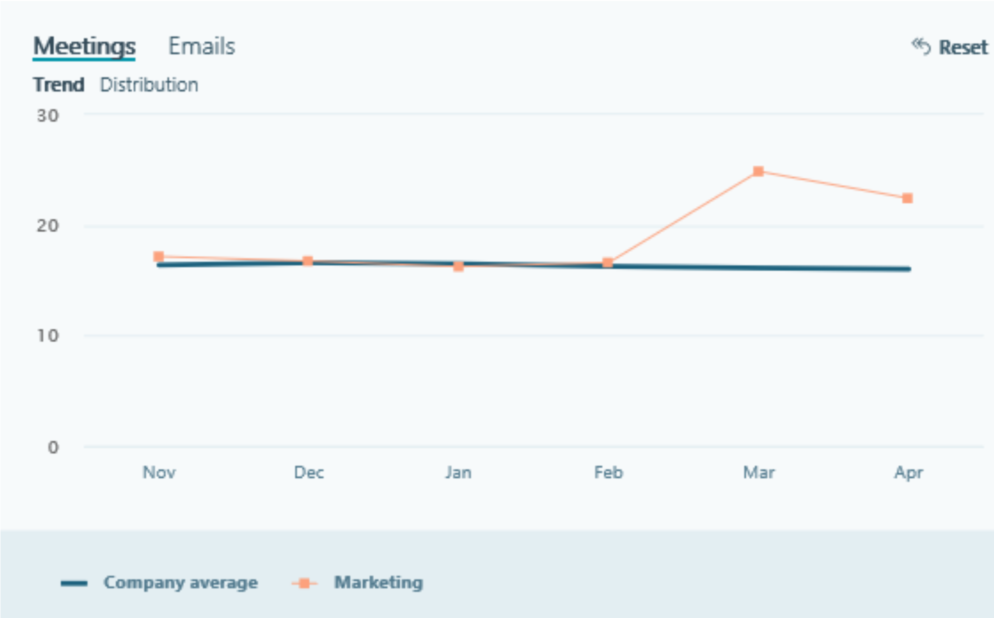
In this stage, your goal is to understand the scope of the problem, discover where it is most affecting the employees and the business, and identify where you want to explore further. You should expect to see significant differences in collaboration by function, level, IC/Manager, region, and so on. Fully understanding roles and their expected collaboration patterns will help you interpret the data most effectively.

The **Week in the Life** tab in the **Explore** dashboard is an excellent place to start. You can explore the data by using filters and groupings, and drill down further into your data to find the areas of the organization that are experiencing the largest symptoms of collaboration overload. At the end of your exploration, you should be able to answer the following fundamental questions about your organization.

Scope and nature of collaboration overload

- How much time on average (hours per week) do employees spend in collaboration?
- Which organizations, functions, levels, roles spend the most time in collaboration?
- Is the overload problem too many meetings, or too many emails, or both?
- Is collaboration overload cyclical or seasonal, or on-going?
- Is the collaboration overload problem growing in a specific group over time?

Example

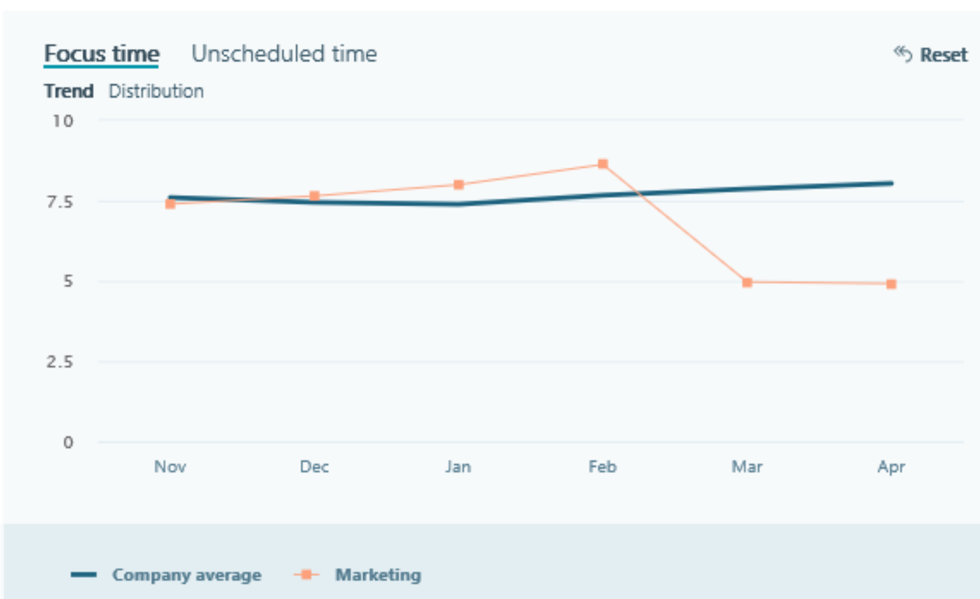


Individual Marketing contributors experienced an uptick in average meeting hours per week in the last two months

Effect of collaboration overload on focus time

On average, how much *focus time* do employees have to get their work done, particularly individual contributors reliant on this time to complete work. Total focus hours are defined as the number of hours made up of two hour or greater blocks of time where the employee has no meetings.

Example



Individual Marketing contributors had 33 percent less average focus hours per week to get work done in the last two months

Effect of collaboration overload on work-life balance

- How much time on average do employees spend in after-hours work per week?
- How lengthy is their work week span?
- Is after-hours work cyclical, or consistently high?

Example

Individual Marketing contributors were working an average of two more after-hours per week in the last two months

You now have a good idea about which areas of the organization are experiencing collaboration overload. In the next step, you will drill down to the root causes of that overload for each of the organizations experiencing it.

Step 3. Diagnose root causes

Informed by current business literature and academic studies, Workplace Analytics has identified several common root causes of organizational collaboration overload. Not all these will apply to your organization, and different root causes might exist in different regions, divisions, or functions.

First, find the problem statements that best represent the collaboration overload for the organization you are studying, based on your investigation in Step 2. Next, use Workplace Analytics to quantify those problems, as outlined in detail in this section. Then, use the best practice recommendations associated with each problem statement in Step 4 to map out your action plan.

While not an exhaustive list of analyses or actions, practice with this suggested approach will provide a sound foundation upon which to develop your own custom analyses.

Poor Meeting Norms

- ✓ We have an overly inclusive meeting culture
- ✓ Our meetings are too long
- ✓ Employees frequently multi-task in meetings.
- ✓ We have too many unnecessary recurring meetings
- ✓ Our employees don't have sufficient focus time to get work done
- ✓ Certain roles generate a high meeting load on the organization
- ✓ Our meetings always start late.
- ✓ Meetings are scheduled at the last minute.

Poor Email Norms

- ✓ We have an overly collaborative meeting culture
- ✓ After hours email communications are harming work/life balance
- ✓ Focus on rapid email responses interrupts and slows down work

Org Chart Impact

- ✓ Too many layers of management redundancy in meetings
- ✓ Decision maker is not present in meetings
- ✓ Managers are not delegating work
- ✓ Managers are de-prioritizing 1:1s with their direct reports

Time Zone Impact

- ✓ Our organization is spending a large amount of time in after hours collaboration
- ✓ Collaborating with Group X in Region Y is creating significant after hour work

Customer Impact

- ✓ Our organization is spending too much time collaborating with "Customer X"
- ✓ Too many employees in our organization are interacting with "Customer X"

Process Impact

- ✓ Our organization is spending too much time collaborating in "Process Y"
- ✓ Too many employees in our organization are participating in "Process Y"

Problem statements associated with root causes of organizational collaboration overload

Problems and analysis for poor meeting norms

- **The meeting culture is overly inclusive**. Large meetings leave all but a small minority of actively participating attendees disengaged. An overly collaborative and inclusive culture, which can stem from associating meeting attendance with employee importance. Or it might be the outcome of a consensus-driven culture, which leads to a safe invite-all (and accept-all) attitude, creating overly large meetings. [4]
- **Meetings are too long**. Meetings that regularly run over 1 hour rarely retain the focus of attendees, unless they are well designed small brain-storming and problem-solving sessions. A professional study has demonstrated that a manager's attention drops after 52 minutes in a meeting. [3]
- **Employees frequently multi-task in meetings.** Multitasking can reduce productivity by as much as 40 percent. [5] Email multitasking in a meeting means attendees are not contributing at their full potential in a meeting, hearing only part of the communication and/or failing to contribute their know-how to the task at hand.
- **Employees have too many unnecessary recurring meetings**. Regularly scheduled meetings can persist long after the original organizer has departed the company. Recurring meetings should be addressed on a regular basis to ensure they are still needed. In tackling recurring meetings, one company was able to gain back an average of 5 hours per week. [8]
- **Employees don't have sufficient focus time to get their work done**. "At many companies, the proportion of time employees spend in meetings, on the phone, and responding to emails hovers around 80 percent, leaving employees little time for all the critical work they must complete on their own. Performance suffers as they are buried under an avalanche of requests for input or advice, access to resources, or attendance at a meeting. They take assignments home, and soon, according to a large body of evidence on stress, burnout and turnover become real risks." [10]
- **Certain functions/roles generate a high meeting load on the rest of the organization.** Specific groups of employees can be unaware of the unintentionally large and costly load they are generating in their spirit of inclusiveness. In one Technology unit Microsoft's Workplace Analytics worked with, 5 employees were unintentionally accounting for 30 percent of meeting hours. [7]
- **Meetings that always start late**. Running from one meeting to the next with no breaks in between, particularly for meeting organizers, leads to an inevitable cascade of delays, less well-prepared meetings, and a greater likelihood of multitasking in email during meetings.
- **Meetings that are scheduled at the last minute**. Organizers who schedule meetings at the last minute create an undue load on their fellow co-workers and are less likely to conduct quality meetings.

To analyze poor meeting norms

1. Start by identifying a set of problem statements that best represent the poor meeting practice within areas of the organization you identified for study.
2. Investigate meeting inefficiencies by identifying organizational variations to see whether some teams perform better than others. This will help to identify desired behaviors and organizational norms more quickly.

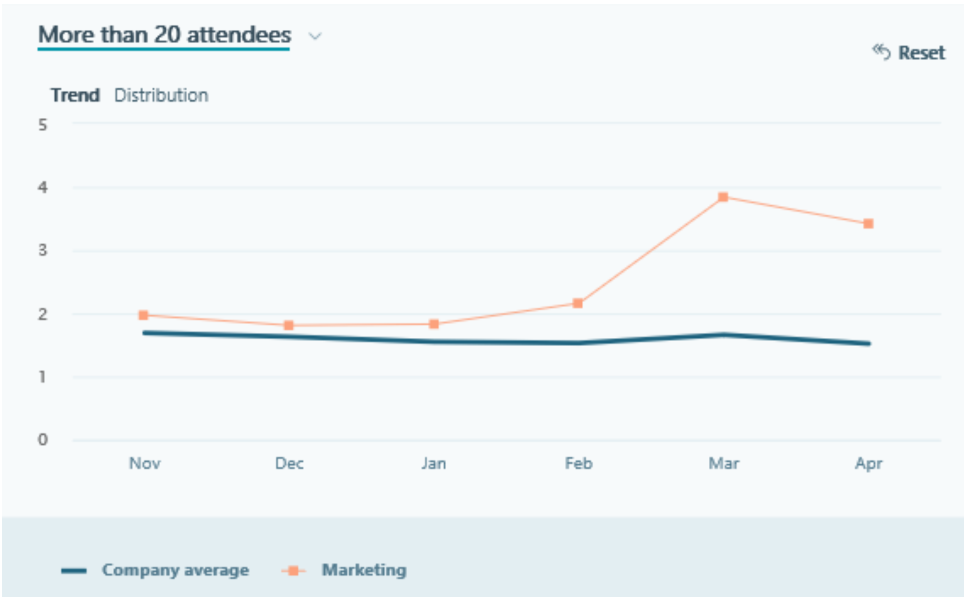
It is a good practice to interview individuals in that organization to understand their norms. Qualitative feedback from those interviews can help add color to your quantified outcomes.

The following table lists analysis tasks and interpretations for the problem statements. Refer to this table in the Appendix for instructions on the corresponding query.

Problem statement	Analysis tasks	Interpretation
A meeting culture that is overly inclusive.	Examine meeting time with high number of attendees.	A high percentage of meeting hours with 18+ people suggests poor meeting accountability and a lack of empowerment. Some people use the 8-18-1800 rule as a rough guideline: [2] • Decision-making meetings have up to 8 attendees • Brainstorming/Updates meetings have up to 18 attendees • Informational meetings can have up to 1800 or more attendees
Meetings that are too long.	Examine meeting count with long duration.	A high percentage of meetings greater than an hour in duration suggests poor meeting planning and a potential for disengagement.
Employees frequently multi-task in meetings.	Examine meeting time with multitasking.	Multi-tasking can become a cultural norm in organizations exhibiting collaboration overload. Look for managers with high multitasking rates. Managers who multi-task send a clear signal that the meeting is not important, leading others to follow.
Employees have too many unnecessary recurring meetings.	Examine recurring meeting time.	A high number and percentage of weekly hours in recurring meetings suggests a more rigid and less agile meeting culture, particularly in recurring meetings with the topics “status” and “update” in the subject line. On the other hand, too little time in recurring meetings suggests a lack of planned collaboration to get the job done. Note that stand-up scrum meetings are often daily, but short and small. Examine redundancy, double booking, and multi-tasking rates in recurring meetings to determine if they are effective and necessary.
Employees don’t have sufficient focus time to get their work done.	Determine how much focus time employees have.	A low number of focus hours, particularly for independent contributors, suggests insufficient time to get work done.
Certain functions/roles generate a high meeting load on the rest of the organization.	Identify groups that generate high collaboration workloads.	Groups who generate consistently large organizational loads are low-hanging fruit for rapid impact. Follow-on analysis includes determining whether the load is due to organizing many meetings vs. inviting many attendees, what types of meetings these individuals are scheduling, and whether they are high-engagement meetings.
Meetings that always start late.	Examine the relationship between back-to-back meetings and multi-tasking.	Identify employees impacted by back-to-back meetings and confirm if they are spending more time multi-tasking in meetings, thus reducing their engagement as they try to catch up on other work during the meeting.

Meetings are scheduled at the last minute.	Determine the frequency of meetings scheduled at the last minute.	Many ad-hoc meetings (scheduled within 24 hours) disrupt attendees' weekly schedules and can be indicative of poor planning or constant fire-fighting, which might warrant further investigation into the source.

Example



Marketing Individual contributors have doubled their time in large meetings of 20+ attendees in last two months

Problems and analysis for poor email norms

Why is it important to address poor email norms?

- **The email culture is overly collaborative.** A huge volume of incoming email becomes a distraction from focus work and a source of employee stress, particularly if combined with many meetings. Multitasking can reduce productivity by as much as 40 percent. [5] A cluttered email inbox makes it difficult to distinguish between high and low priority emails. A high volume of emails can be a symptom of a consensus-driven, inclusive, or risk averse culture, which can bog down decision making when no one is clearly accountable. [9]
- **After-hours email communications are harming work/life balance**. Email sent after hours, particularly by managers, can generate undue stress and poor work/life balance for employees who feel compelled to respond rapidly, which keep employees working 24/7. It also hampers productivity because experiments have shown that employees require down time to produce new ideas and fresh insights. [12]
- **Focus on rapid email responses interrupts and slows down work.** Incoming email readily disrupts valuable focus time, taking employees' time away from getting their work done.

To analyze poor email norms

1. Start by identifying the set of problem statements that best represent the email practices within areas of the organization you've identified for study.
2. Investigate email inefficiencies by identifying organizational variations to see whether some teams perform better than others. This will help to identify desired behaviors and organizational norms more quickly.

Interviewing individuals in that organization to understand their norms is a good practice. Qualitative feedback from those interviews can help add color to your quantified outcomes.

The following table lists analysis tasks and interpretations for the problem statements. Refer to this table in the Appendix for instructions on the corresponding query.

Problem Statement	Analysis tasks	Interpretation
The email culture is overly collaborative.	Determine the time spent on emails, and identify the groups impacting others with excessive email volume.	Individuals who send a lot of emails, and send them to many recipients, might need awareness training around the organizational load they are placing on their colleagues. Identify these groups of individuals to educate them on their impact. Individuals on the receiving end of many emails might need best practice suggestions for managing their email volume. **Note**: Workplace Analytics does not currently unbundle distribution lists, which means the organizational load from emails is currently under-reported.
Email communications are being sent after hours.	Determine if certain groups or managers are sending too many after-hours emails.	A high number of after-hours emails, particularly by managers, can be an after-hours work generator for employees, resulting in a reduction in work-life balance and greater stress. If consistent over time, it can be an indicator of under-capacity in a group.
Focus on rapid email responses interrupts and slows down work.	Identify any links between email response time and high email volume.	Look for very short, average email response times, indicates employees who are readily interrupted by email, rather than focusing in meetings or getting work done. On the flip side, very long response times, coupled with a high number of received emails, indicates individuals who are having a hard time keeping up with their email.

Example

Managers in Marketing have increased their after-hours email activity by 100 percent in last two months

Org chart impact problems and analysis

Lack of role clarity as it relates to decision making and project management can be a major contributor to meeting time and size spiraling out of control.

- **Too many layers of management are attending meetings**. A high degree of meeting redundancy is indicative of potential inefficient use of managers' time. Managers can be freed up and, lower levels can be empowered by increasing delegation and avoiding redundancy in meeting representation. [10]
- **The decision maker is not present in the meeting**. A high double-booked rate implies an unwillingness to commit to a meeting, and the inability to delegate. If managers maintain a high double-booked rate, organizers are uncertain about decision maker attendance, decisions are postponed, and new meetings must be organized, creating a cycle of more and more meetings.
- **Managers are not delegating work**. If employees spend too much of their meeting time with their manager, they are less empowered and engaged, and their ability to grow in their career is reduced. [13]
- **Managers are de-prioritizing 1:1s with their direct reports**. Managers who are overloaded with meetings might unintentionally be delaying or de-prioritizing their 1:1s. Manager 1:1s are critical to employee development, and if ignored, can lead to employee disengagement and ultimately attrition. [14]

To analyze organizational chart impact

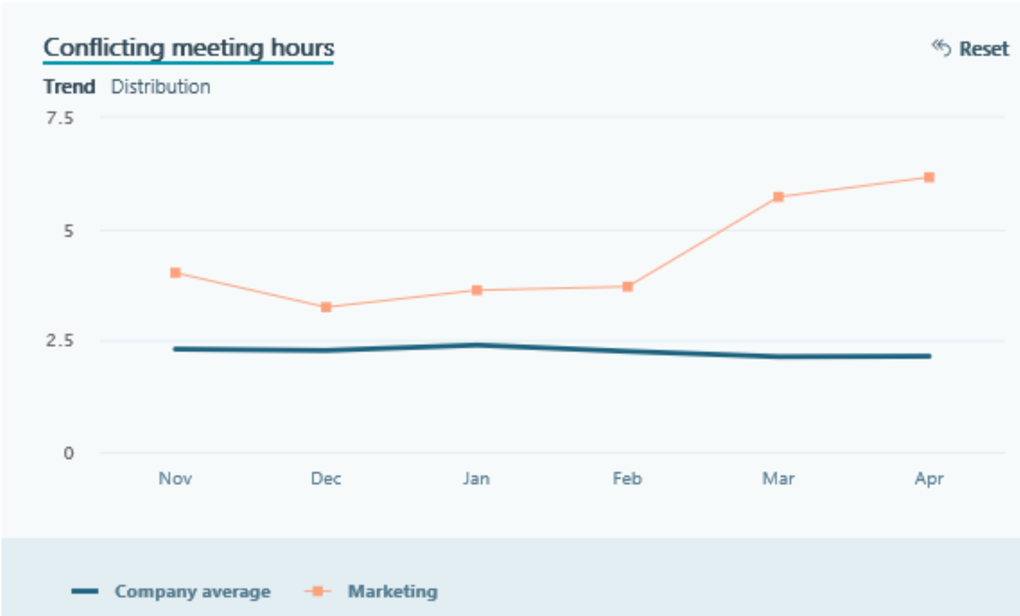
1. Start by identifying the set of problem statements that best represent the organizational chart issues within areas of the organization you identified for study.
2. Compare behaviors across roles and teams to identify desired and non-desired behaviors and norms.

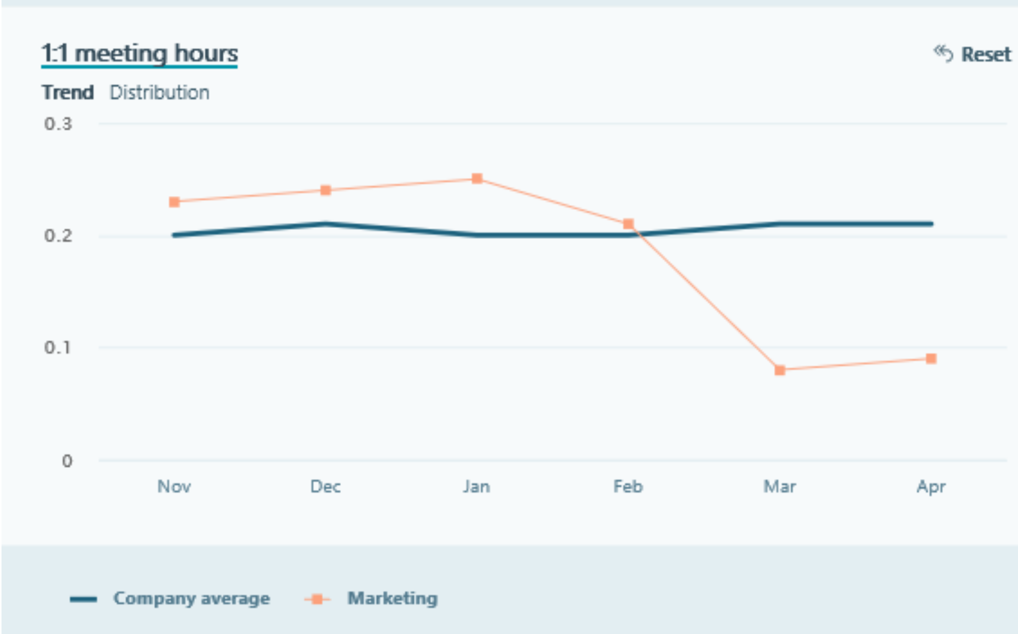
It is also a good practice to interview individuals in the problematic organization to understand their norms; qualitative feedback from those interviews can help add color to your quantified outcomes.

The following table lists analysis tasks and interpretations for the problem statements. Refer to this table in the Appendix for instructions on the corresponding query.

Problem statement	Analysis tasks	Interpretation
Too many layers of management are attending meetings.	Find out if certain functions or regions have a high degree of redundant meetings.	A high degree of functional redundancy can be an indication of an underlying lack of role clarity, poor delegation, and/or a risk averse culture. Lower level employees attending a high proportion of redundant meetings will feel less empowered. Senior levels might be better off by appropriately delegating meeting attendance. As a sign of career development, redundancy should diminish with tenure.
The decision maker is not present in the meeting.	Find out if managers or decision makers are overbooked.	High double-booked rates, particularly for managers and senior decision-making levels, is a smoke signal for potential slow decision making and bottlenecks. Employees are generally better off declining or accepting the meeting to signal their intention or forwarding it to an empowered delegate with decision making authority.
Managers are not delegating work.	Find out if ratio of employees' time with manager vs total collaboration time is higher than expected.	An extremely high proportion of time spent in meetings with manager suggests micromanagement. On the other hand, too little time spent with managers in meetings potentially suggest insufficient team guidance, particularly for newly onboarded employees. As a sign of career development, redundancy should diminish with tenure.
Managers are de-prioritizing 1:1s with their direct reports.	Find out how much time managers are spending in 1:1's with their employees.	A minimum of one hour per month (roughly 30 minutes every two weeks) is a good practice for managers and their direct reports to follow. Consistently low manager hours are a signal of poor people management. "You should have one-on-ones frequently (for example, once a week) with a subordinate who is inexperienced in a specific situation and less frequently (perhaps once every few weeks) with an experienced veteran." [15]

Example





Marketing managers' double-booking rates are on the rise, suggesting the potential for project delays. Their direct reports are experiencing a drop in 1:1 coaching time.

Time zone impact problems and analysis

- **The organization is spending a large amount of time in after-hours meetings and email.** Requiring a consistently high volume of after-hours work from employees due to collaboration with other time zones creates a work/life imbalance, and ultimately lower employee satisfaction, and lower productivity. [15]
- **Collaborating with Group X in Region Y is causing a collaboration overload.** To act on time zone-related after-hours work, it is important to locate the source of the demand. Who is generating the emails and meetings that are causing individuals to work outside normal working hours?

To analyze time-zone impact

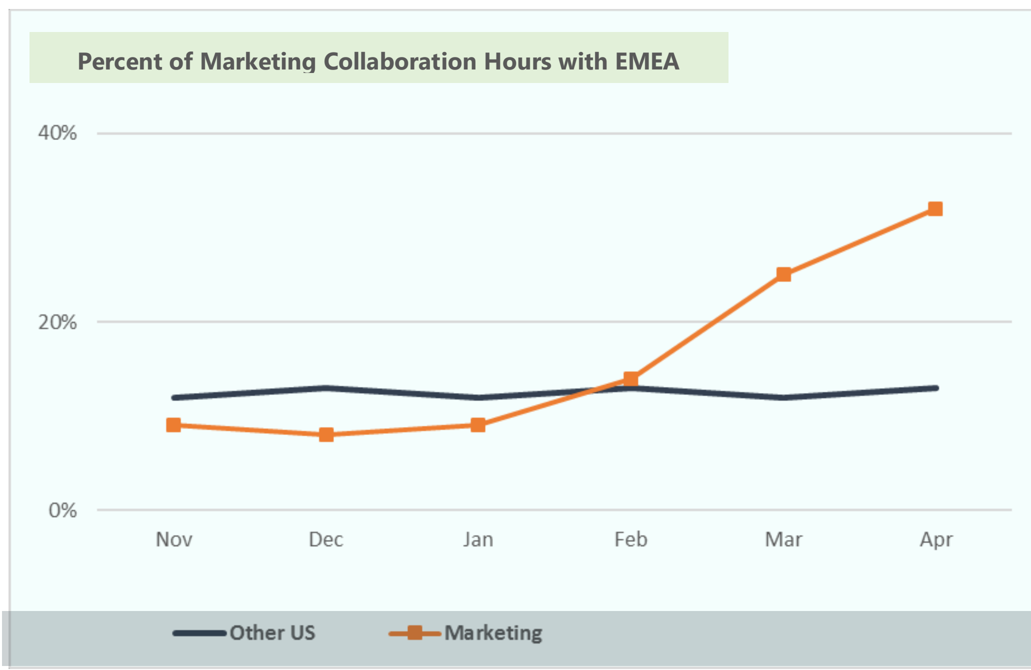
Working across many time zones can result in long work days for employees. Comparing how teams that collaborate across time zones manage their emails and meetings can help teams identify more effective meeting practices across the organization.

It is also a good practice to interview individuals in the affected organization to understand who they are collaborating with after-hours, what their function is, and within what region they are located.

The following table lists analysis tasks and interpretations for the problem statements. Refer to this table in the Appendix for instructions on the corresponding query.

Problem statement	Analysis tasks	Interpretation
Our org is working long days or spending a large amount of time in after hours.	Look for high after hours to determine which teams and which regions are hardest hit by after hours.	High after hours or long working hours can have an impact on employee satisfaction and productivity. Consideration should be given to employee expectations (e.g. degree to which daytime hours Pacific Time Zone impact Asia after hours).
Collaborating with Group X in Region Y is creating this collaboration overload.	Determine which functions / regions are generating the most after hours.	If certain functions or regions are generating disproportionate amounts of after-hours on certain groups, this might indicate issues with current staffing or operating models within the company.

Example



Marketing has increased its collaboration hours with employees in EMEA from 12 percent in November to 37 percent in April.

Customer impact problems and analysis

Our organization overall is spending too much time with “Customer X”. Too much time spent with either an internal or external customer, partner, or vendor can be an indicator of a problematic relationship, particularly if it extends over a long period of time.

Too many employees in our organization are interacting with “Customer X.” Too many employees involved in a single customer relationship can be an indicator of a problematic relationship. In one Microsoft Workplace Analytics use case, we identified that 44 percent of employees were spending at least one hour per week with channel partners, while only 17 percent of total hours came from employees in the Channel organization.

To analyze customer impact

Some vendors and internal or external customers can consume large amounts of time and resources. First, understanding and then optimizing this time allocation can significantly increase employee time available within the org.

It is a good practice to interview individuals in the affected organization to understand what internal and external customers, partners, or vendors they collaborate with, and why collaboration might be higher than desirable.

The following table lists analysis tasks and interpretations for the problem statements. Refer to this table in the Appendix for instructions on the corresponding query.

Problem statement	Analysis tasks	Interpretation
Our org is spending too much time with its customers (either internal or external).	Determine how much time teams are spending with their internal customers or external parties.	If certain teams are spending too much time with external parties or internal customers, this can be an indicator of deeper organizational relationship issues.
Too many employees in our org are interacting with "Customer X".	Determine the number of employees spending time on certain customers.	Too many employees dealing with a single customer suggests a duplication of effort, or "shadow units" performing the same role.

Example

Marketing collaboration in EMEA in the last two months is primarily with EMEA Sales, Marketing and Product Management

Process impact problems and analysis

The organization is spending too much time in "Process Y." Too much time spent in a process, particularly if it represents a low-value activity, is a poor use of valuable employee time. It can also indicate an activity spinning out of control. One organization was able to reduce employee meetings by 5 hours per week; 40 percent of that was due to reductions in wasteful "leadership team" meetings. [8]

Too many employees in our organization are spending time in "Process Y." Too many employees involved in a process, particularly if it represents a low-value activity, can be an indicator of duplication of effort.

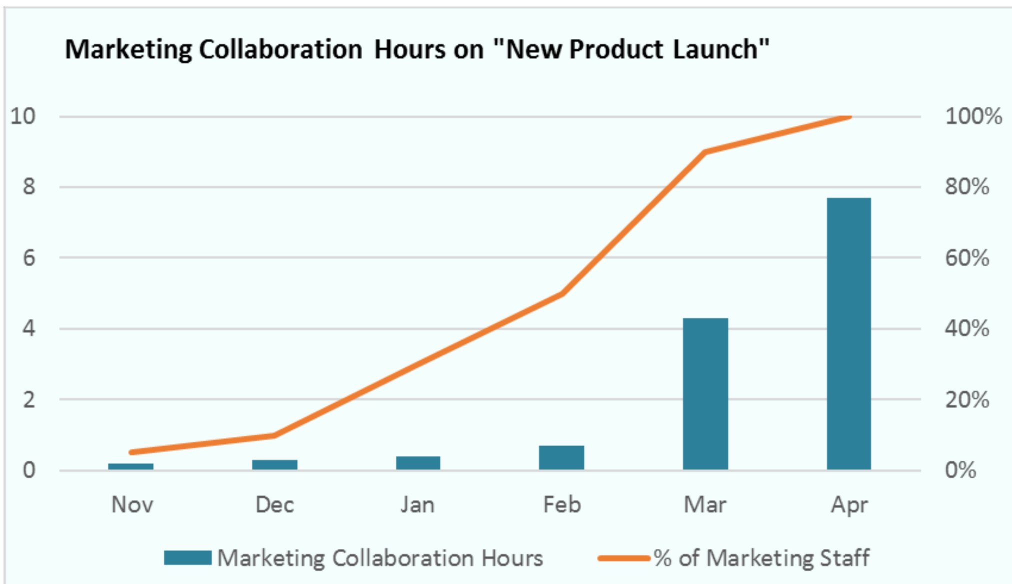
To analyze process impact

To measure how much collaboration time is being spent in a process, you can use key words associated with the process in email and meeting subject lines. For example, "learn" and "train" are commonly found in emails and meetings associated with training. "Status" or "update" identifies status update meetings. A good practice is to interview individuals impacted by over collaboration with the process to understand how to identify the process from email and meeting subject lines.

The following table lists the analysis tasks and interpretations for the problem statements. Refer to this table in the Appendix for instructions on the corresponding query.

Problem statement	Analysis tasks	Interpretation
Our org is spending too much time in "Process Y."	Find out how much time internal parties are spending on wasteful processes.	If a certain organization is spending excessive time on processes, this can be an indication of bottlenecks or inefficiency in company. This data can be used to help map how company is spending time compared to what management expects.
Too many employees in our org are participating in "Process Y."	Find out how many employees are engaged in "Process Y."	If a high volume of people is spending too much time in unneeded processes, this could be a sign that duplication of efforts is occurring.

Example



Marketing time and Marketing employee involvement in "New Product Launch" has increased dramatically.

Step 4: Implement change

Workplace Analytics helps inform change management programs

Organizational change is never easy. By using the results of your analysis, you can develop a more effective change management program for addressing collaboration overload.

Who: In Step 2: Explore, you identified the areas of the organization (business units, functions, roles) most affected by collaboration overload. Your change management program should target these populations.

Why: In Step 3: Diagnose, you have uncovered the root causes of collaboration overload. You can marry the quantitative assessment with a qualitative, self-reported assessment (for example, focus groups, interviews, surveys) to fully flesh out the problem and create the business case for change.

How: Each overload collaboration root cause has a recommended set of best practices and actions associated with it. Use the recommendations in the tables below as a starting point to inform the change management program.

Change management program recommendations

This section contains a set of best practices or recommendations for change for each of the problem statements described in this playbook.

Poor meeting norms

Problem statement	Best Practice Recommendations
A meeting culture that is overly inclusive.	• Ensure only required attendees (decision makers, subject matter experts, stakeholders, and implementers) are invited to decision-making, brainstorming, and status update meetings. (Informational meetings can have an unlimited number of attendees.) • Clarify meeting roles. • Establish norms allowing attendees to decline meetings and leave meetings they are not contributing to. • Provide training and create awareness around meeting organization and meeting responses. [2, 4, 6] • Ensure all attendees receive meeting notes and plans of action. Avoid the need to generate more emails after the meeting by using the Meeting Notes feature in Outlook. • Teach Outlook calendar best practices. Learn more with video training.
Meetings that are too long.	• Schedule shorter meetings. • Require meeting agendas. • Keep the meeting on track. • Provide training on meeting facilitation. [2, 4, 6]
Employees that frequently multi-task in meetings.	• Set a meeting “no device” policy. [5] • Ensure only required attendees are invited to meetings.
Too many unnecessarily recurring meetings.	• Revisit low-engagement, recurring meetings on the calendar to determine if their composition, length, and frequency can be reduced. You can use a meeting query to generate a report of high cost recurring meetings for each team, to help determine if attendance in these meetings can be reduced.
Employees don’t have sufficient focus time on their calendars to get their work done.	• Develop team norms around protecting focus time and scheduling around it. • Block out one or two hours of focus time on individual calendars. • Clearly label the focus time with the tasks to accomplish (such as, “Catch up on emails,” “Create Proposal for Customer X,” and “QA code for Project Y”).
Specific functions or roles that generate a high meeting load for the organization.	• Provide training and create awareness around meeting organization for roles and functions unintentionally generating high meeting loads. [2, 4, 6] • Revisit low engagement recurring meetings on the calendar to determine if their composition, length, and frequency can be reduced.

Meetings that always start late.	• Schedule 25 and 55-minute meetings. • Start meetings on time. • End meetings five minutes early. • If certain individuals are habitually late, address this in 1:1s.
Meetings that are scheduled at the last minute.	• Provide sufficient notice when organizing meetings. • Require meeting agendas. • Determine if there are other root causes of consistent last-minute scheduling.

Poor email norms

Problem Statement	Best practice recommendations
An email culture that is overly collaborative.	**Email originators** • Make your emails short and succinct (a long email might be better communicated through conversation). • Use effective subject lines. • Err on the side of need-to-know in sending emails. • Don't abuse "cc." • Prevent email message recipients from using Reply All or Forward. • Avoid the need to generate more emails after the meeting by using the Meeting Notes feature in Outlook. **Email recipients** • Manage email messages by using rules. • Don't' feel pressured by immediacy and schedule receive commands to run at a set time. • Schedule a focused "mailbox response time" on your calendar. **All** • Teach Outlook calendar best practices. Learn more with video training. • Check out more useful email tips in *Fundamental Email Etiquette Rules*. [11]
Email communications are sent after hours.	• Prepare, but do not send, emails after hours, particularly if you are a manager. Schedule send commands to run at a set time. • Establish team expectations and norms around after-hours email communications.
Focusing on rapid email responses are impeding work.	• Manage email messages by using rules. • Don't feel pressured by immediacy and schedule receive commands to run at a set time. • Schedule a focused "mailbox response time" on your calendar.

Organizational chart impact

Problem statement	Recommendations for change
Too many layers of management are attending meetings.	**Senior levels** Determine if someone at a more junior level can attend as meeting representative and delegate accordingly, freeing up meeting time. **Meeting organizer** • Clarify meeting roles and avoid redundancy. • Ensure only required attendees invited to meetings. • Cancel meeting if decision-maker will not be present.
The decision maker is not present in the meeting.	**Decision maker** • Avoid "tentative" meeting response. • If not attending, send empowered delegate.

	Meeting organizer • Clarify meeting roles and avoid redundancy. • Ensure only required attendees invited to meetings. • Cancel meeting if decision maker will not be present
Managers are not delegating work.	Review meeting time spent with direct reports and delegate accountability and meeting attendance responsibility.
Managers are de-prioritizing 1:1s with their direct reports.	• Schedule regular 1:1s with each direct report. • Protect 1:1s from conflicting meetings.

Time-zone impact

Problem statement	Recommendations for change
Our org is spending a large amount of time in after-hours work. Collaborating with Group X in Region Y is creating this collaboration overload.	• Establish mutually acceptable new meeting and email norms between the parties experiencing high after-hours demands and the parties generating them. • Use asynchronous methods of communication (For example, Microsoft Teams). • Manage projects in an asynchronous way. • Meet in smaller groups. • Share travel plans and schedule changes.

Customer impact

Problem statement	Recommendations for change
Our org is spending too much time with "Customer Q." Too many employees in our org are interacting with "Customer Q."	The recommendations around this root cause will be situation and customer-specific. Some broad recommendations around this issue include: • Clarify the roles of each employee involved in the customer relationship. • Extract the redundant resources from the customer relationship. • Establish baseline and track expected customer support hours. • Communicate roles and the degree of expected support to the customer: is there a willingness on the part of the customer to pay for additional support? • Ensure that processes and teaming models from efficient customer relationships are applied to this customer.

Process impact

Problem statement	Recommendations for change
Our org is spending too much time in "Process Y". Too many employees in our org are participating in "Process Y"	The recommendations around this root cause will be situation and process-specific. Some broad recommendations around this root cause include: • Map out the process. • Clarify the roles of each employee involved in each step of the process. • Extract any redundant resources from each step of the process. • Establish and track expected hours allocated to the process. • Ensure that the approach and teaming models from efficient and effective internal processes are applied to this process.

Use MyAnalytics to enhance change management programs

The preceding process and recommendations can form a solid foundation for the creation of your change management program. Consider integrating MyAnalytics as a tool into your change management program. MyAnalytics is a private dashboard for Office 365 users, enabling you to see how employees spend time in meetings and email, who they collaborate with, and what their progress is toward weekly goals. It creates employee awareness around time management and productivity, enabling them to track progress based on new norms that are introduced during the change management program.

On a larger scale, the combination of Workplace Analytics with MyAnalytics can help your organization:

- Improve efficiency
- Engage employees
- Make smarter team decisions

My Analytics creates employee awareness around time management and productivity

Step 5: Measure impact

Organizational change does not translate to business value until you can measure the positive impact of that change. Workplace Analytics provides a means to quantify changes in behaviors to determine the effect of the collaboration overload change management program. Ultimately, these changes in work behaviors lead to better business outcomes. Additionally, the MyAnalytics dashboards provide employees with the information they need to track their individual progress.

What to measure

After a change management program has been implemented, you can measure the progress of change by using Workplace Analytics *leading indicators* as early indicators of future business outcome improvements.

- *Leading indicators* of collaboration overload are too many meeting hours, too many email hours, and after-hours work. For example, observing a reduction in meeting hours-and an increase in focus hours-suggests an increase in productivity that leads to future reduced labor costs. A reduction in after-hours work leads to better work-life balance for employees, and ultimately a more engaged workforce.
- *Lagging indicators* are the business outcomes impacted by collaboration overload, including:
    - **Reduced labor costs**: Employees can accomplish more with less.
    - **Schedule reduction**: Faster decision making and increased agility speed up the pace of organizational deliverables.
    - **Employee retention**: Empowered and unstressed employees make it easier to hire and to retain employees.

The leading indicator metrics can be integrated into business dashboards to measure changes over time, and to highlight when performance levels shift to desired states.

Tips to interpret changes in the data

- Use a control group to evaluate the effect of your change management program. This will help mitigate the variation introduced by external forces such as seasonality.
- When looking at changes in data, make sure to understand the statistical significance of the changes you observe. For example, it is important to separate natural variation from special-cause variation.
- When looking at changes in data, ensure that you connect the context with the outcomes you are seeing. For example, if a function has undergone a management change, or the data encompasses a large project with tight deadlines, you will need consider that changing environment as you evaluate the collaboration metrics.

Be aware of seasonality and other external factors that can affect your data in the short term.

Collaboration overload references

Publication	Title	Author	Date
1. Harvard Business Review	Your Scarcest Resource	Michael Mankins, Chris Brahm	5/1/2014
2. Harvard Business Review	How to know if there are too many people in your meeting	HBR Staff	3/18/2015
3. GetSolid Blog	Professional Study: Managers' Attention Drop 52 Minutes Into a Meeting	Thibaut Davoult	4/02/2015
4. Harvard Business Review	What everyone needs to know about running a productive meeting	Dana Rousmaniere	3/13/2015
5. Forbes	Want to be more productive? Stop Multi-tasking	Lisa Quast	2/6/2017
6. Harvard Business Review	Five Ways to Run Better Virtual Meetings	Keith Ferrazzi	5/03/2012
7. The Wall Street Journal	Stop Wasting Everyone's Time	Sue Shellenbarger	12/2/2014
8. Harvard Business Review	How to Finally Kill the Useless, Recurring Meeting	Ryan Fuller	3/17/2015
9. The Economist	The Collaboration Curse	Schumpeter	1/23/2016
10. Harvard Business Review, Leadership and Managing People	Collaborative Overload	Rob Cross, Rob Rebelled, Adam Grant	Jan-Feb 2016
11. Lifeward	Fundamental Email Etiquette: 26 Easy Rules to Follow	Heinz Tschabitscher	5/14/2017
12. Harvard Business Review	How late night emails are hurting your team	Maura Thomas	3/16/2015
13. Harvard Business Review	How to stop micromanaging your team	Rebecca Knight	8/21/2015
14. Harvard Business Review	What great managers do daily	Ryan Fuller and Nina Shikaloff	12/14/2016
15. Penguin Random House	High Output Management	Andy Grove	8/29/1995
16. Washington Post	Spaniards are less productive, constantly tired because Spain is in the wrong time zone	Caitlin Dewey	9/26/2013
17. Harvard Business Review	Quantify How Much Time Your Company Wastes	Ryan Fuller	5/28/2014
18. Bain Insights	The Analytics of Time Well Spent	Mark Kovac, Jonathan Frick	4/13/2017

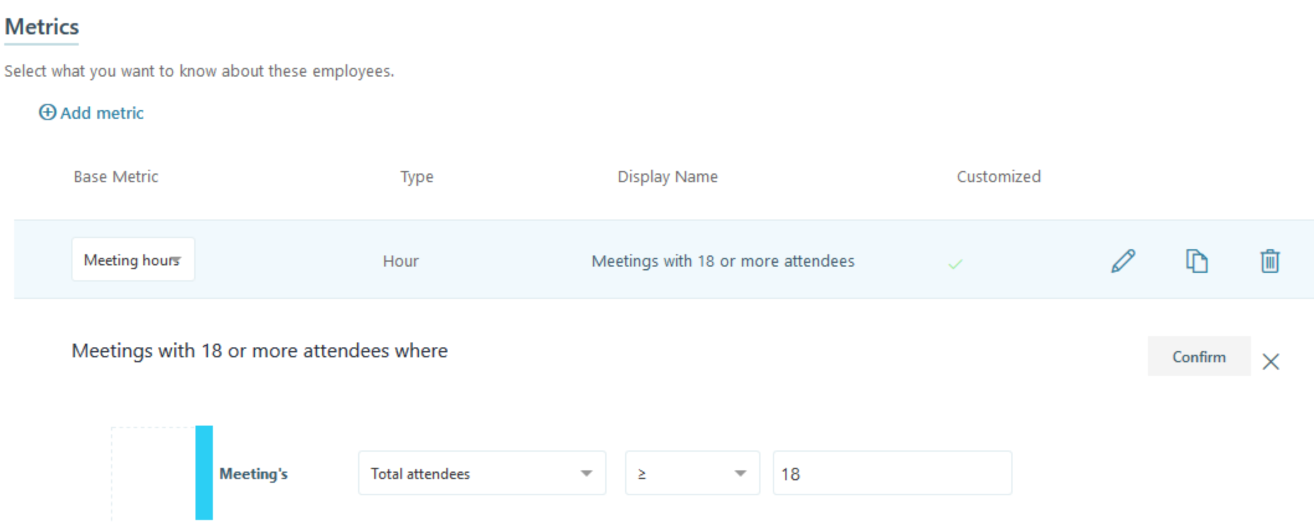
19. Bain Insights	Decision focused meetings	Michael Mankins and Jenny Davis-Peccoud	6/7/2011

Appendix A: Flexible queries for analysis

The majority of the data analysis requires creating Person queries in Workplace Analytics to produce reports in which each row represents an employee week. You can then use the report (output file) to group and compare employees by using available human resources (HR) metrics. Unless otherwise noted, all the queries in the following tables refer to the Person query (Type = Person).

The column names in the following tables are defined as follows:

- **Analysis**: The name of the analysis you are performing which corresponds with the problem statements listed in Step 3 of this playbook.
- **Template**: If a template already exists for the desired analysis metrics, the name of the template is provided.
- **Base Metric**: The name of the base metric that you select for a query, which you can then customize further with a filter. For example, the following graphic shows the Meeting hours metric selected, and then a metric filter is selected and edited to create the custom metric of "Meetings with 18 or more attendees."
- **Metric customization**: The conditional logic applied to the base metric to formulate the desired custom metric. In some cases, the desired metric is already a Base Metric that requires no customization, in which case this column entry is "not applicable" in the following tables.



Specification for the custom metric of "Meetings with 18 or more attendees"

After the query runs and the report is generated, the report can be aggregated from the employee-week level to the desired level of aggregation by using any number of tools. Commonly used groupings that help to examine metrics include the following:

- Organization
- Function
- Level
- Layer
- Region
- Manager-Individual Contributor
- Role

Poor meeting norms

Analysis	Template?	Base Metric(s)	Metric Customization?
Large Meetings	Meeting Hours by Attendees	Meetings or Meeting Hours	Total attendees > X
Long Meetings	Meeting Hours by Duration	Meetings or Meeting Hours	DurationHours > X
Multitasking Meetings	Base Metric Report	Multitasking Meeting hours	Not applicable
Recurring Meetings	Not applicable	Meetings or Meeting Hours	IsRecurring = True
Focus Time	Base Metric Report	Open 1 hr block Open 2 hr blocks Total Focus Hours	Not applicable
Generated Workload	Base Metric Report	Generated workload meetings organized Generated workload meeting hours Generated workload meeting attendees Generated workload email recipients Generated workload email hours	Not applicable
Back to Back Meetings	*Not yet available*		
Last Minute Meetings	*Not yet available*		

Poor email norms

Analysis	Template?	Base Metric(s)	Metric Customization?
Email Volume and Culture	Base Metric Report	Email hours Emails sent Generated workload email recipients Generated workload email hours Total emails sent during meetings	Not applicable
After-hours Emails	After Hours Collaboration	After hours email hours Emails sent	Time of day sent > X pm AND Time of day sent < Y am
Email Response Time	Not yet available		

Org chart impact

Analysis	Template?	Base Metric(s)
Redundant Meetings	Base Metric Report	Redundant meeting hours
Overbooking Meeting Time	Base Metric Report	Conflicting meeting hours
Under-delegation and Micromanagement	Base Metric Report	Meeting hours with Manager Meeting hours
Manager 1:1 Coaching	Base Metric Report	Meetings with manager 1:1 Meeting hours with manager 1:1

Time-zone impact

Analysis	Template?	Base Metric(s)	Metric Customization?
After Hours and Worktime Span	After Hours Collaboration	Email hours Meeting hours Workweek span	*For Email hours:* Sent time > X pm AND Sent time < Y am *For Meeting hours:* Start time >= HH:MM AND Start time < HH:MM
Type=Groups: Group Collaboration Impact	Not applicable	Group A: Typically function or role Group B: Region or function Collaboration hours (time allocated)	Not applicable

Customer impact

Analysis	Template?	Base Metric(s)	Metric Customization?
Time Spent with External Parties	Base Metric Report	Collaboration hours external	Not applicable
Time Spent with External Parties broken out by emails/meetings	Not applicable	Email hours Meeting hours	**Participant:** At least one attendee IsInternal = False
Time Spent with Specific External Customer	Not applicable	Collaboration hours	**Participant:** At least one attendee's Domain = domainname.com
Type = Groups: Time Spent with Internal Customer	Not applicable	Group A: Typically function or role Group B: HR attribute for internal customers Collaboration hours (time allocated)	Not applicable

Process impact

Analysis	Template?	Base Metric(s)	Metric Customization?
Org Time Spent on Process Y	Not applicable	Email hours Meeting hours	*For Email hours:* **Email's** Subject Contains "Process Y" *For Meeting hours:* Meeting's Subject Contains "Process Y"
Number of Employees Spending Time on Process Y	Not applicable	Email hours Meeting hours	*For Email hours:* **Email's** Subject Contains "Process Y" *For Meeting hours:* Meeting's Subject Contains "Process Y" *Customize further after report generated or filter only employees where collaboration hours on topic > 0*

Appendix B: Summary Table of Metrics

This table summarizes the metrics used in the Person queries in Appendix A.

Collaboration Overload Analysis – Summary Table of Metrics to Use																									
Analysis Area	Collaboration hours	Collaboration hours external	Conflicting meeting hours	Email hours	Emails sent	Emails sent during meeting	Generated workload email hours	Generated workload email	Generated workload meeting	Generated workload meeting	Generated workload meetings	Low quality meeting hours	Meeting hours	Meeting hours with manager	Meeting hours with manager 1:1	Meetings	Meetings with manager	Meetings with manager 1:1	Multitasking meeting hours	Network size internal	Networking outside organization	Open 1 hour block	Open 2 hour blocks	Redundant meeting hours	Workweek span hours
Poor Meeting Norms			X				X	X	X	X	X		C			C			X			X	X		
Poor Email Norms				C	C	X	X	X																	
Org Chart Impact			X										X	X	X		X	X						X	
Time Zone Impact	X			C									C												X
Customer Impact	X	X		C									C												
Process Impact				C									C												

Workplace Analytics Metrics (X = Uses Base Metric, C = Custom Metric)