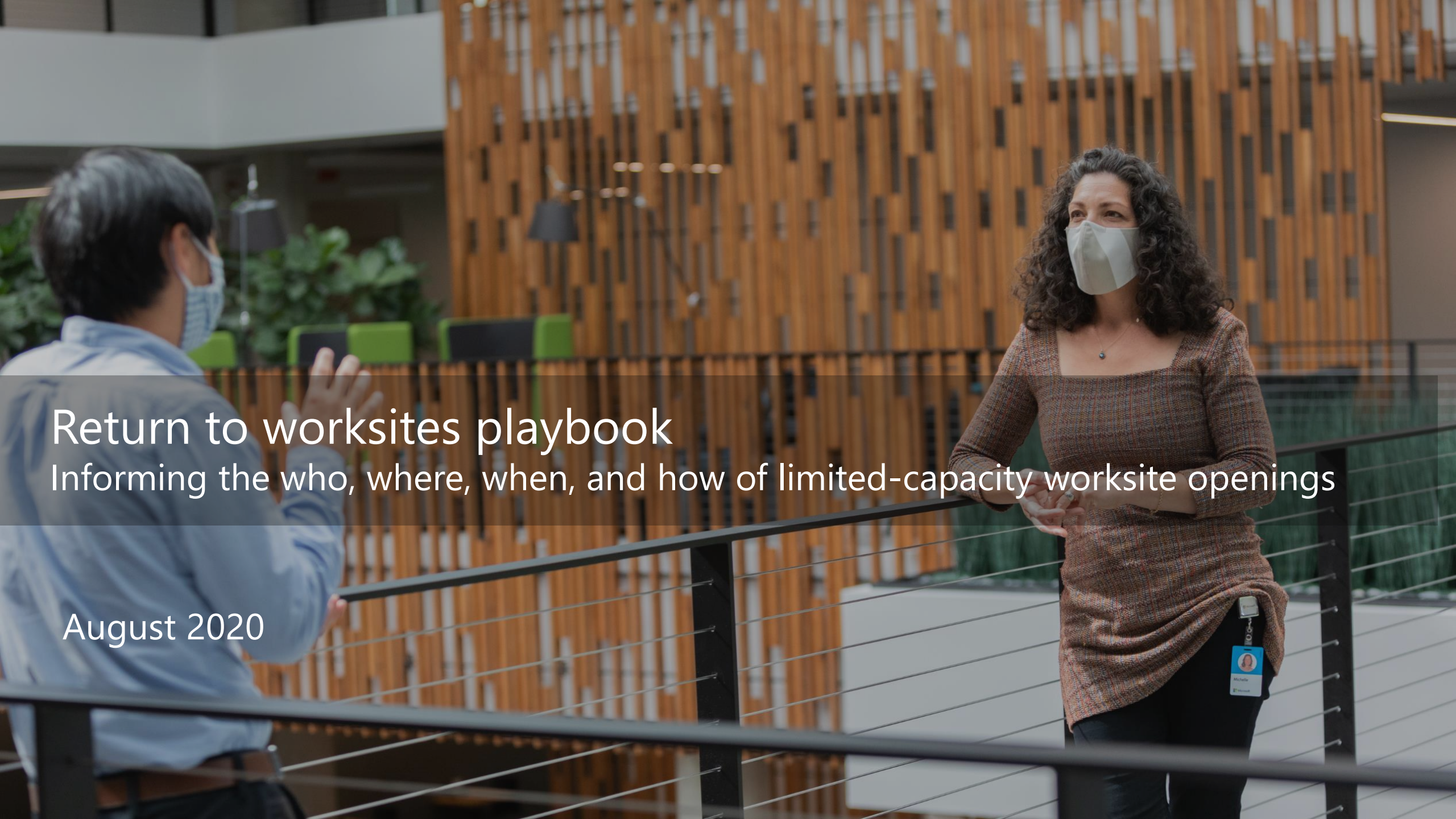

Return to worksites playbook

Informing the who, where, when, and how of limited-capacity worksite openings

August 2020

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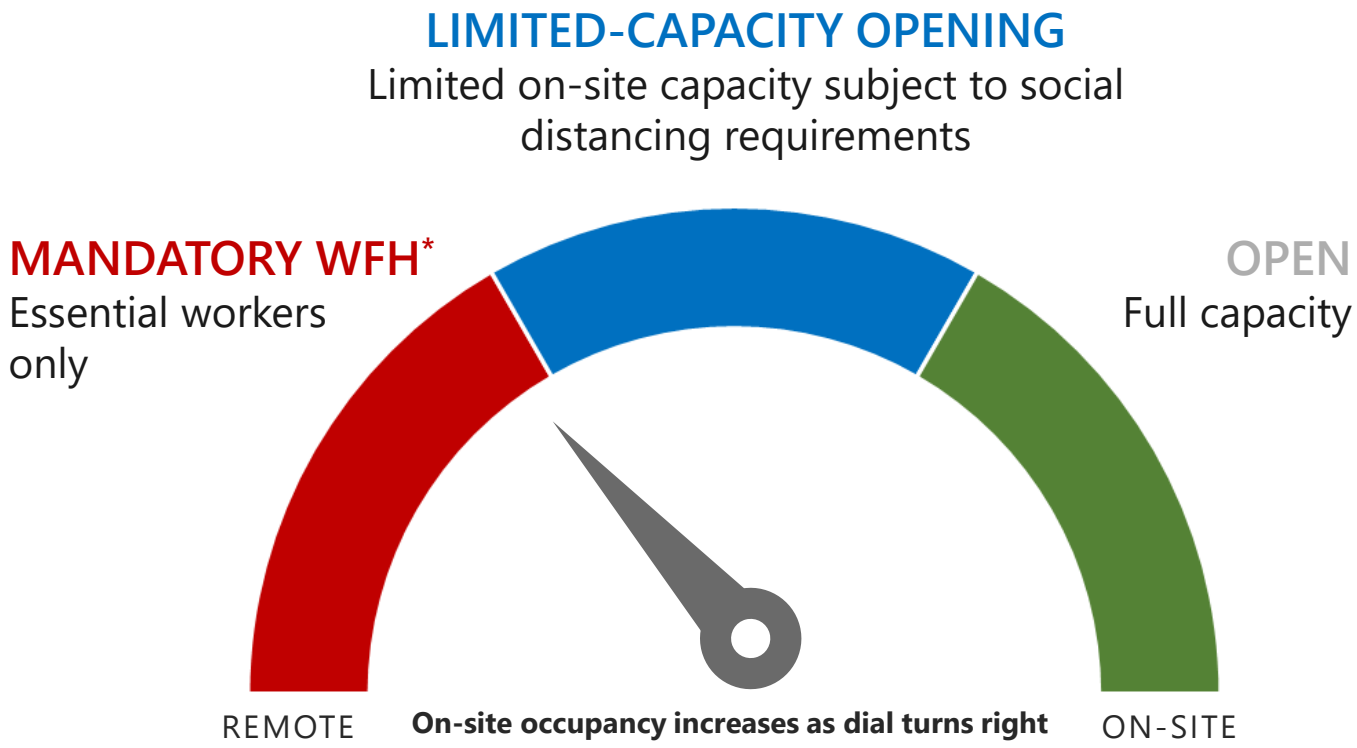
Microsoft

Introduction

Worksites around the globe are gearing up for limited-capacity openings in adherence with local government restrictions and positive health indicators



* WFH = work from home

The preparations, decisions, and logistics associated with limited-capacity openings in each worksite around the world are extensive

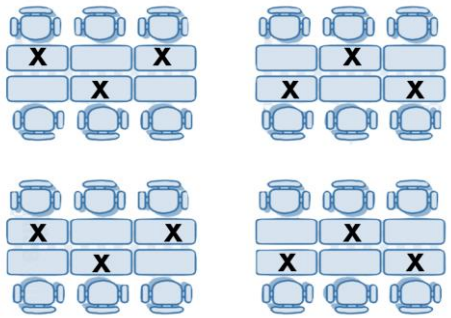
- **Decision to return**
  Do local health conditions and government restrictions permit opening? Are local leaders and employees comfortable returning?

- **Employee communication**
  Are communication plans for return-to-worksite protocols approved locally and disseminated to all employees?

- **Return-to-workplace attendance plan**
  Logistical decisions about who to return to each worksite, alternating-shifts scheduling, and mapping employees to workplaces.

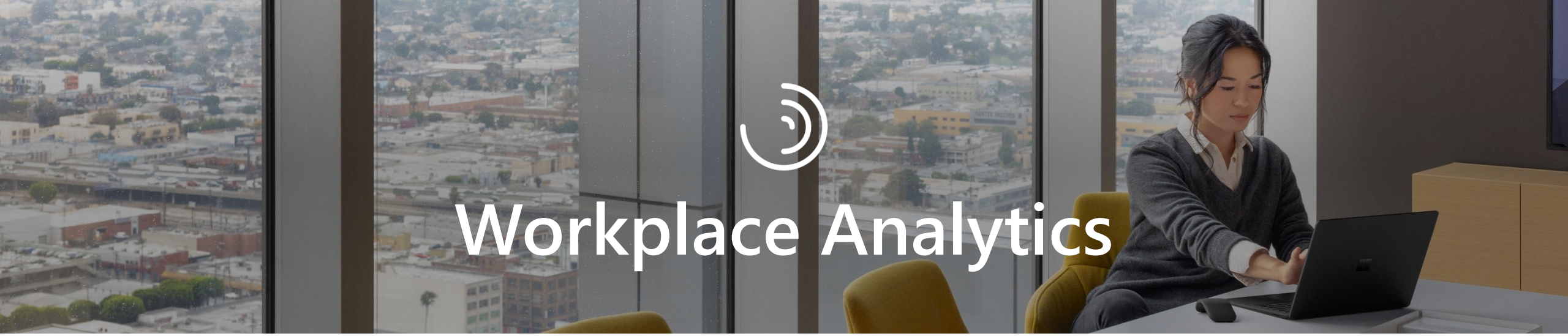
- **Site readiness and safety**
  Can the physical space support limited-capacity seating for social distancing to ensure health and safety? Are safety equipment, practices, and signage in place?

Workplace Analytics provides an objective and data-driven approach for worksite-reentry coordinators, informing their limited capacity plans for each worksite.



Limited-capacity worksite challenges	What Workplace Analytics informs	How?
Who?	Team-based seat allocation optimized for co-located collaboration for each worksite	Use *Return to worksites* Power BI template
When?*	Alternating-shifts schedule that optimizes cross-team collaboration with colleagues on the same shift	Run worksite-specific analyses following the *Return to worksites* playbook
Where?*	A floor plan optimized for cross-team collaboration	
How?	Meeting room usage projections that ensure employees interact safely	

* Requires Microsoft services to deploy Azure technology



Workplace Analytics

Organizational intelligence, shifting culture from soft to science

Native Microsoft 365 data

Start with aggregated behavioral data from everyday work in collaboration tools

+

Organizational context

Map behavioral data to organizational attributes to reveal collaboration patterns

+

Meaningful outcomes

Bring in other data sources to connect collaboration patterns to business outcomes

=

Actionable insights

Use powerful insights to make better business decisions and transform your organization

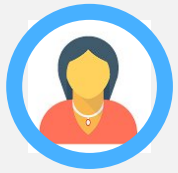
Workplace Analytics provides flexible privacy controls for data access and usage and compliance to help you protect your data

Return to worksites
Analyses

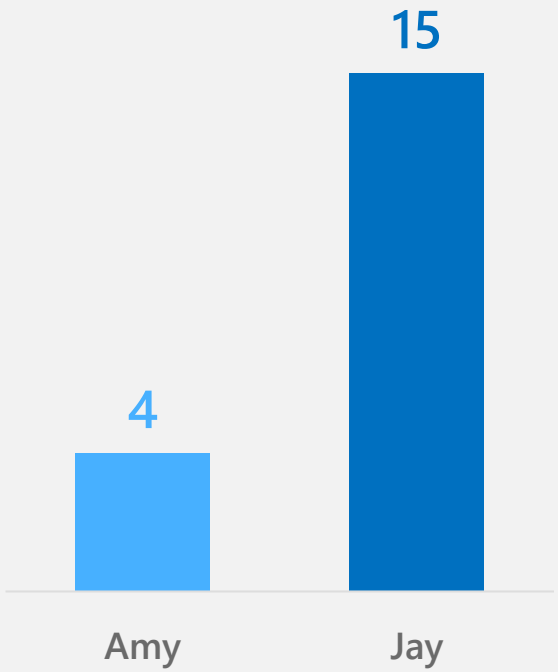
The *Return to worksites* Power BI template prioritizes teams that spend the most time in on-site collaboration

Weekly collaboration hours with co-located colleagues

Example:



Project Manager Amy



Product Developer Jay

Collaborates extensively with co-located colleagues

Weekly collaboration hours: 18
Weekly collaboration with co-located employees: 15

The underlying premise

Teams that spend more time collaborating with co-located employees benefit more from returning to the workplace

What it tells us

There are many different approaches and considerations in determining who to return to a worksite first. For starters, essential workers or workers reliant on equipment (such as lab workers) have the greatest need to return first. Employee personal circumstances and preferences are also critical factors in returning to the worksite decisions. But one simple objective and data-driven approach that can be used to allocate seats **for knowledge workers** is to prioritize those teams that collaborate significantly with others in the office to perform their jobs.

In this example, the *Return to worksites* template will prioritize Jay over Amy, and a team that has more Jays over a team that has more Amys.

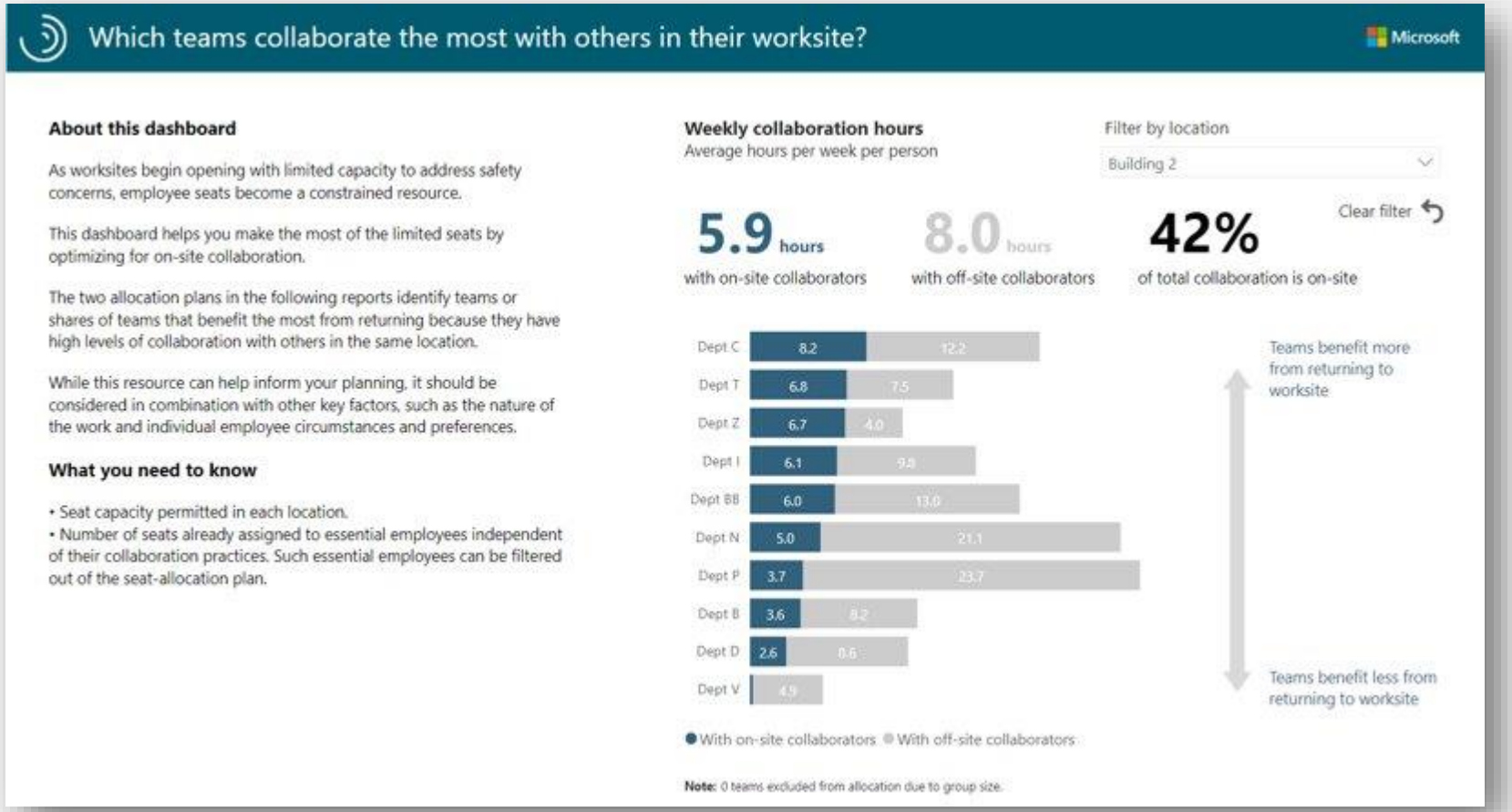
Note: this approach is not applicable for front-line workers who spend little time in meetings, email and Teams collaboration.

How to apply it

Applying this premise, the *Return to worksites* Power BI template walks you through two options to allocate seats to employees at each worksite using a single Workplace Analytics query. We'll walk you through the two options in the next few pages.

Identify which teams spend the most time in on-site collaboration

Use the Workplace Analytics *Return to worksites* power BI template



For step-by-step instructions on running this analysis, click here.

What it tells us

This report reveals which teams spend the most time collaborating with their colleagues in the same worksite. The view presented suggests that employees in Departments C, T and Z will benefit more from being brought back first than Departments B, D and V, which collaborate minimally with their on-site colleagues.

How to apply it

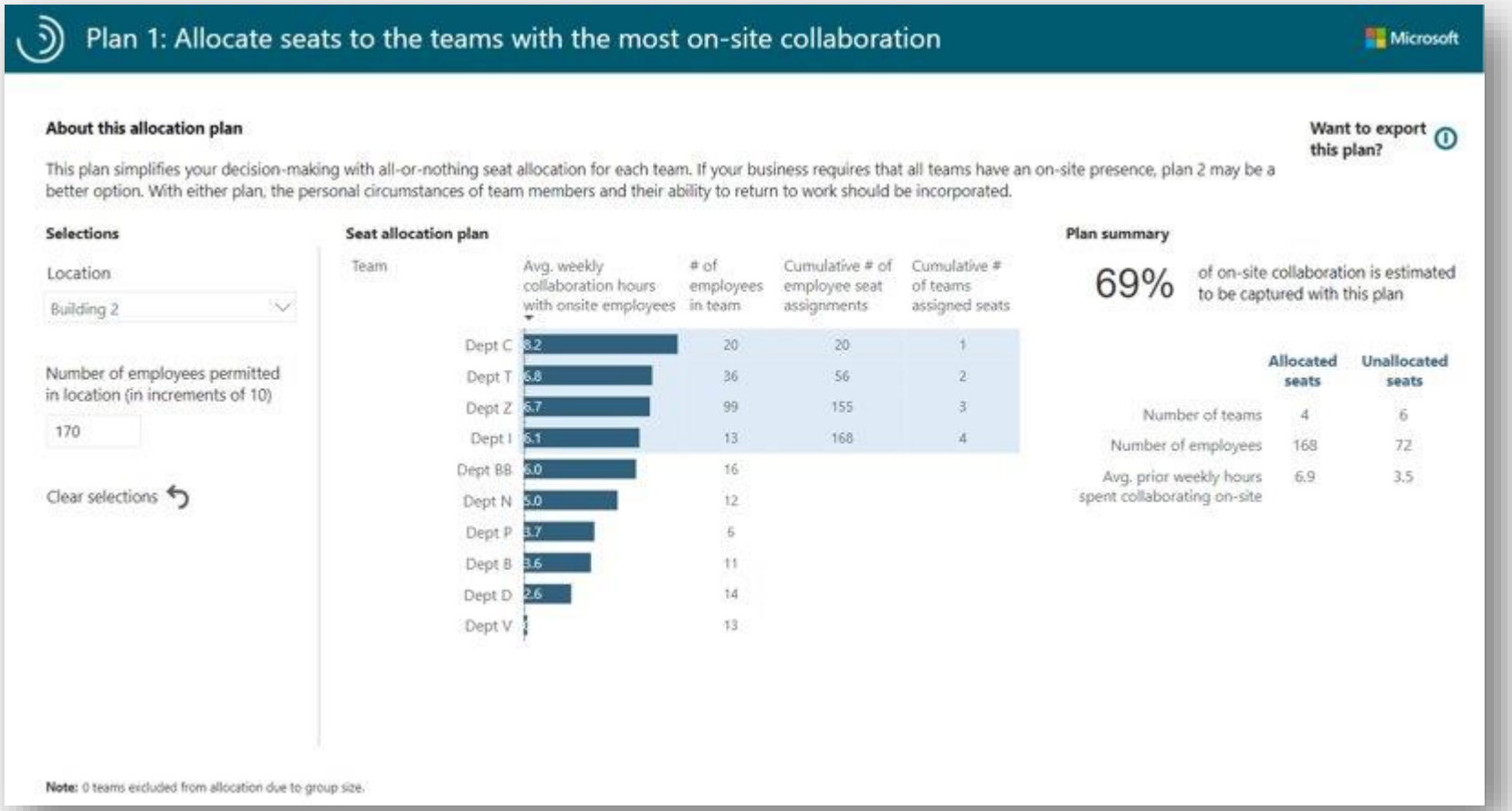
This is your first view into the on-site and off-site collaboration of the teams in each location. This report will serve as the basis for the two seating allocation plan options provided in the subsequent pages of the template.

Prior to creating each plan, you will need to know the following:

- Number of seats permitted in each location with capacity limitations.
- Number of seats already assigned to essential employees regardless of other factors. (They should be excluded from this seat allocation plan.)

Plan 1: Determine which teams to assign to the limited seats in each worksite

Use the Workplace Analytics *Return to worksites* power BI template



For step-by-step instructions on running this analysis, click here.

What it tells us

Which teams are returned to a specific worksite and the estimated re-capture of on-site collaboration, given the permitted number of employees allowed back to the worksite. The estimate incorporates an adjustment to captured on-site collaboration based on the proportion of employees who are not assigned a seat.

This plan returns intact teams that collaborate the most with colleagues in the workplace.

How to apply it

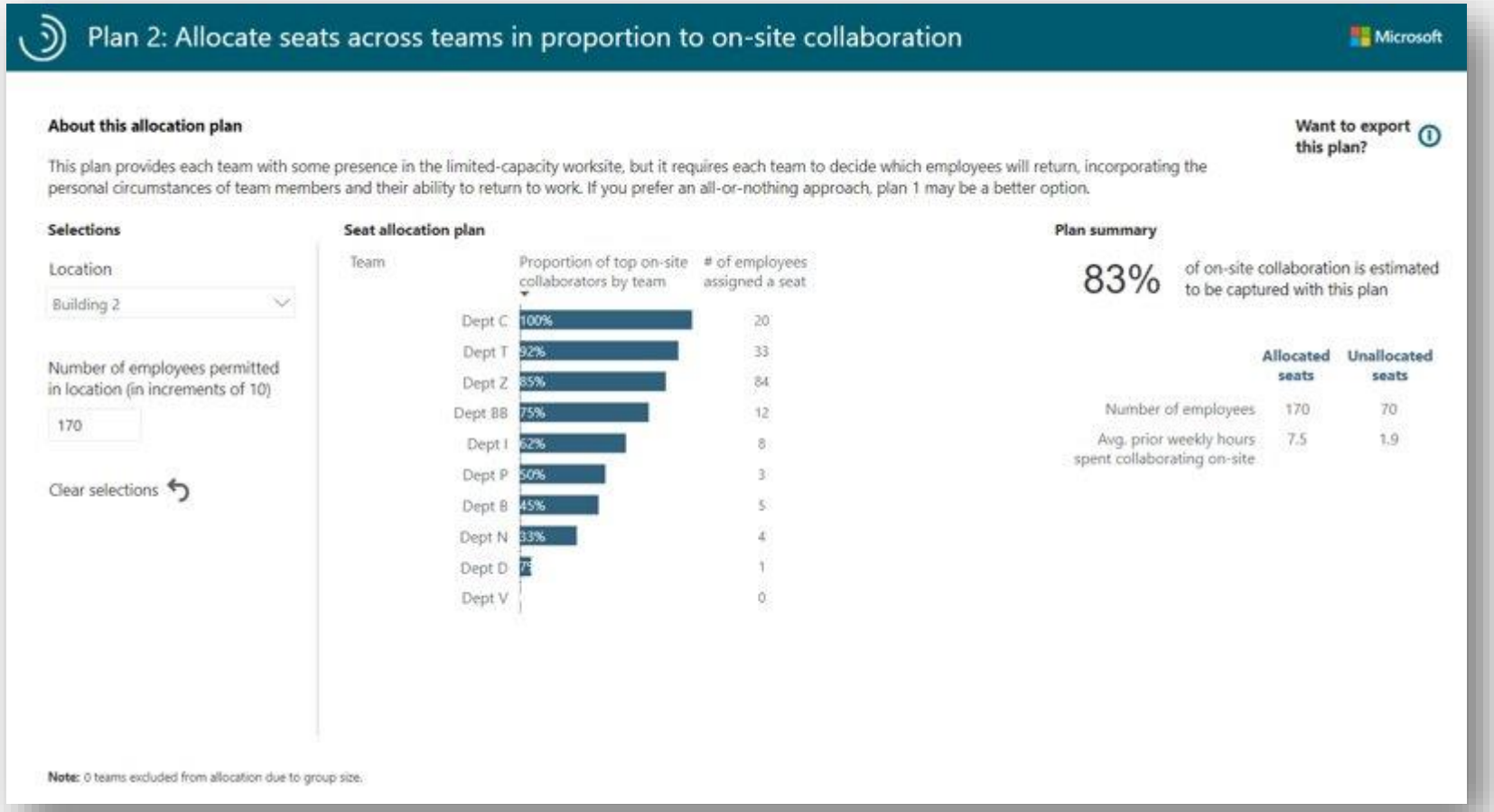
This seat allocation plan provides an automated, objective, and data-driven approach to determine what teams to return to work first.

The plan simplifies the decisions for each leader, making it an all-or-nothing seat allocation for each team. If on-site leadership requires that all teams have some worksite presence during the limited-capacity opening, then Plan 2 might be the better option.

With either option, team leaders should consider the personal circumstances of individual team members and their ability to return to work.

Plan 2: Determine a subset of each team to assign to the limited seats in each worksite

Use the Workplace Analytics *Return to worksites* Power BI template



For step-by-step instructions on running this analysis, click here.

What it tells us

Which subset of teams are returned to a specific worksite work and the estimated re-capture of on-site collaboration, given the permitted number of employees allowed back to the worksite. The estimate incorporates an adjustment to captured on-site collaboration based on the proportion of employees who are not assigned a seat.

This plan allocates team proportions of available seats based on the number of high on-site collaborators on each team.

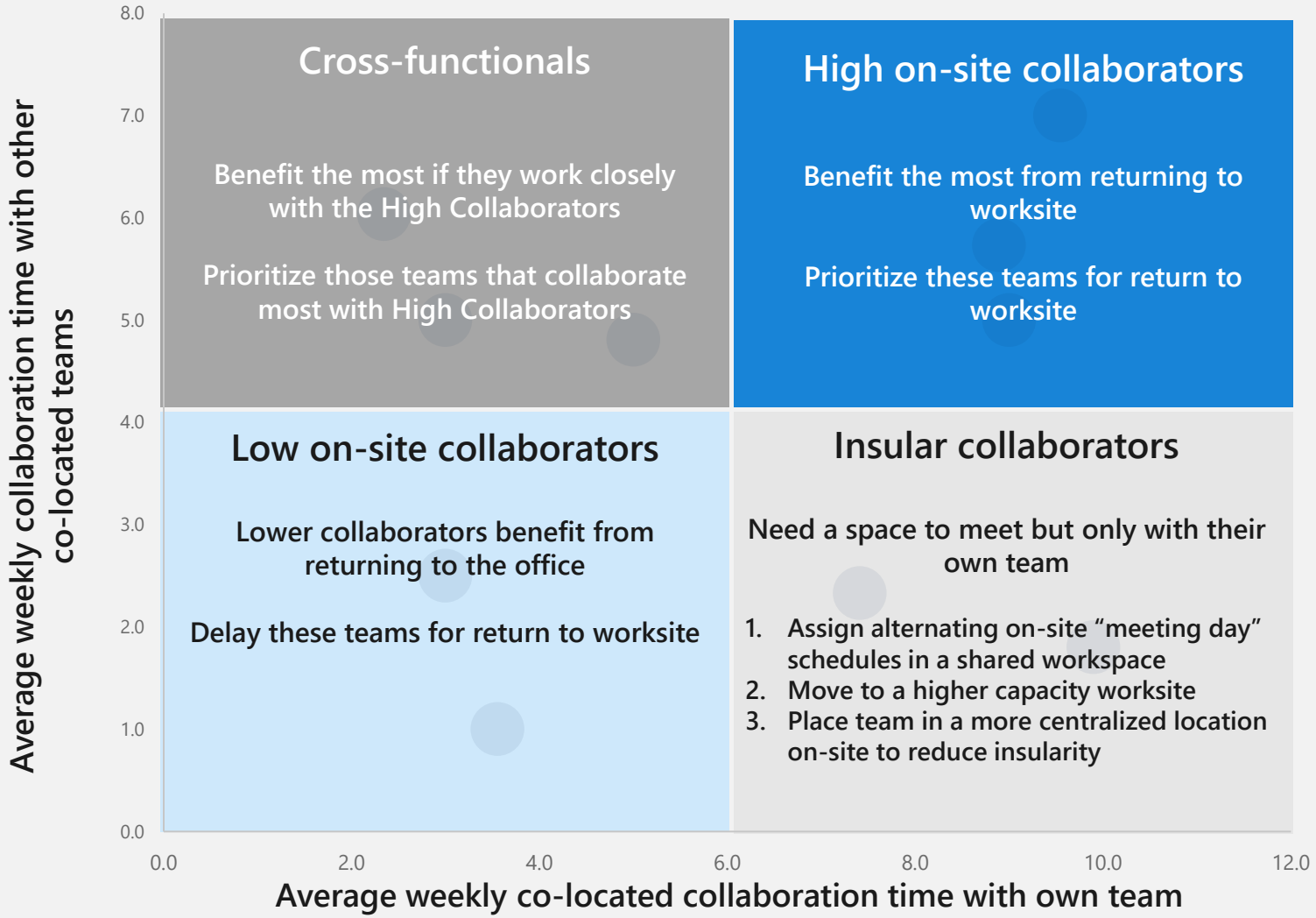
How to apply it

This seat allocation plan provides an automated, objective, and data-driven approach that allocates each team leader at the worksite a specific number of seats during limited-capacity worksite openings.

This option provides each team with some presence in a limited-capacity worksite. But it requires each team leader to determine how those workspaces will be allocated, considering other factors, such as personal circumstances of individual team members and their ability to return to work.

If the team leaders prefer an all-or-nothing approach, then Plan 1 might be a better option.

Map each team to a return-to-worksite option based on their worksite collaboration patterns



What it tells us

Introducing within-team on-site collaboration in combination with cross-functional on-site collaboration enables the organization to distinguish insular teams that collaborate the most with each other, providing the opportunity to explore alternative limited-capacity options.

How to apply it

This report enables leadership and the return-to-work team to explore both short-term and longer-term options for each worksite, such as:

- Offering low on-site collaborators the option of full-time remote work
- Relocating the insular within-team collaborators to a less limited-capacity and/or less expensive location
- Creating alternating-shifts schedules in shared team workspaces for on-site collaboration.
- Reducing team insularity by moving the insular teams to a more centralized workspace on-site

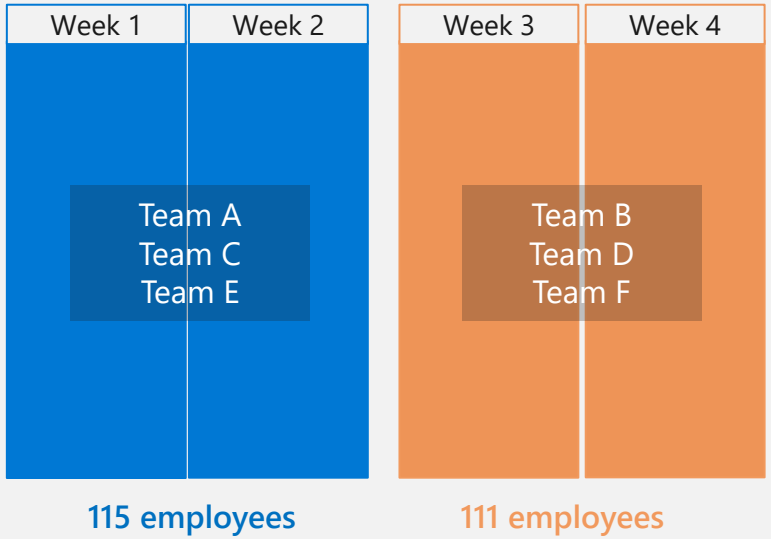
For step-by-step instructions on running this analysis, click here.

Use collaboration patterns between on-site teams to develop an alternating-shifts schedule

Share of total collaboration hours across teams

	Number of employees	Team A	Team C	Team E	Team B	Team D	Team F
Team A	50	63%	24%	10%	2%	1%	0%
Team C	40	25%	56%	13%	4%	1%	1%
Team E	25	18%	32%	48%	4%	3%	3%
Team B	34	2%	3%	4%	58%	18%	15%
Team D	38	3%	1%	0%	22%	65%	9%
Team F	29	1%	3%	5%	11%	19%	61%

Alternating-shifts (daily or weekly) on-site schedule



For step-by-step instructions on running this analysis, click here.

What it tells us

Scheduling alternating shifts is another approach to addressing limited-capacity worksites.

Workplace Analytics splits the designated on-site teams into as close to 50% of the population in each of two "shifts" as possible, allowing teams to continue to work remotely for part of the month and be on-site in a shared workspace for "meeting days" the remainder of the month. The shifts can be alternating days or alternating weeks, depending on the availability of cleaning resources.

How to apply it

In worksites with only 50% of the workstations available during limited-capacity openings, alternate shift scheduling across the teams on the worksite is one way to address the space constraints.

Use this analysis to identify which teams should be grouped together in the same alternating shifts based on the degree of collaboration required to get their work done.

From a workstation cleaning perspective, alternating week shifts may be a more practical approach than alternating shifts.

Develop a worksite floor plan that optimizes collaboration under capacity constraints

Share of total on-site collaboration hours across teams

	Number of employees	Team A	Team C	Team E	Team B	Team D	Team F
Team A	100	63%	24%	10%	2%	1%	0%
Team C	40	25%	56%	13%	4%	1%	1%
Team E	25	11%	29%	48%	2%	2%	8%
Team B	34	1%	2%	2%	58%	18%	19%
Team D	38	3%	1%	0%	17%	70%	9%
Team F	29	1%	3%	5%	11%	22%	58%

Worksite floor plan that places teams in close proximity based on their degree of on-site, cross-team collaboration

For step-by-step instructions on running this analysis, click here.

What it tells us

The resulting floor plan places teams that collaborate the most with each other on-site in as close proximity as possible, given the teams' degree of cross-collaboration, the number of employees in the team designated a seat, and the workspace neighborhood (a combination of building, floor, and area) configuration.

Underlying assumptions:

- Teams will be seated together
- Each team is allocated a fixed number of workstations

How to apply it

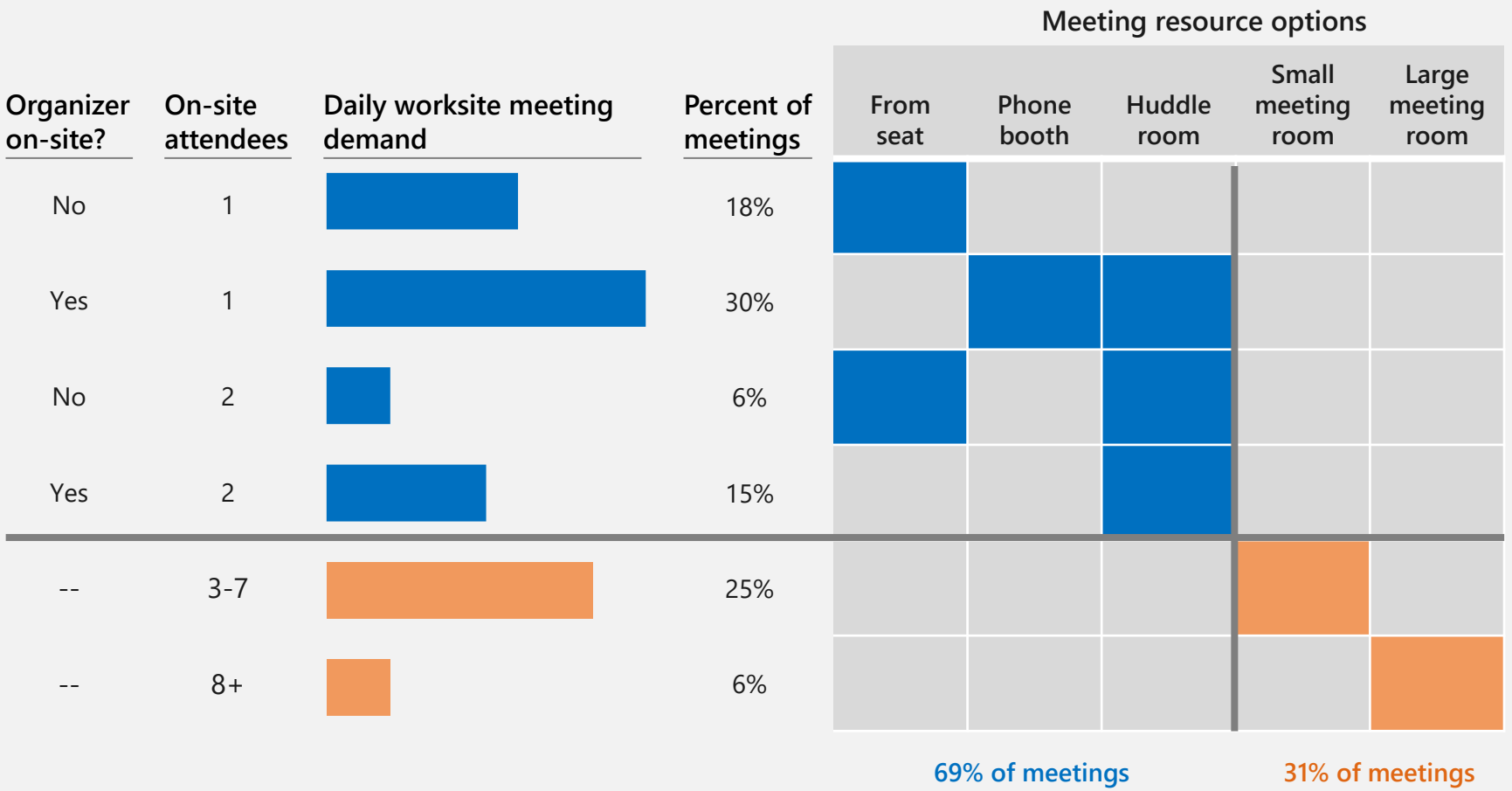
For worksite openings where each team is allocated a specific number of workstations in a specific work area, this limited-capacity floor plan provides you with a data-driven plan that optimizes cross-team collaboration.

It will require the following inputs:

1. Which teams are being brought back to the site
2. The number of workstations allocated to each team for the limited-capacity opening
3. The number of workstations allocated to each neighborhood on the worksite

Estimate the use of meeting rooms to ensure that safety protocols can be met

Daily meeting demand and meeting resource options by on-site attendance



For step-by-step instructions on running this analysis, click here.

What it tells us

Options available to support on-site safety protocols during meetings. This report tells you what types of meetings resources are required.

For this worksite, 69% of meetings are conducted with only 1 to 2 attendees from the site in the meeting.

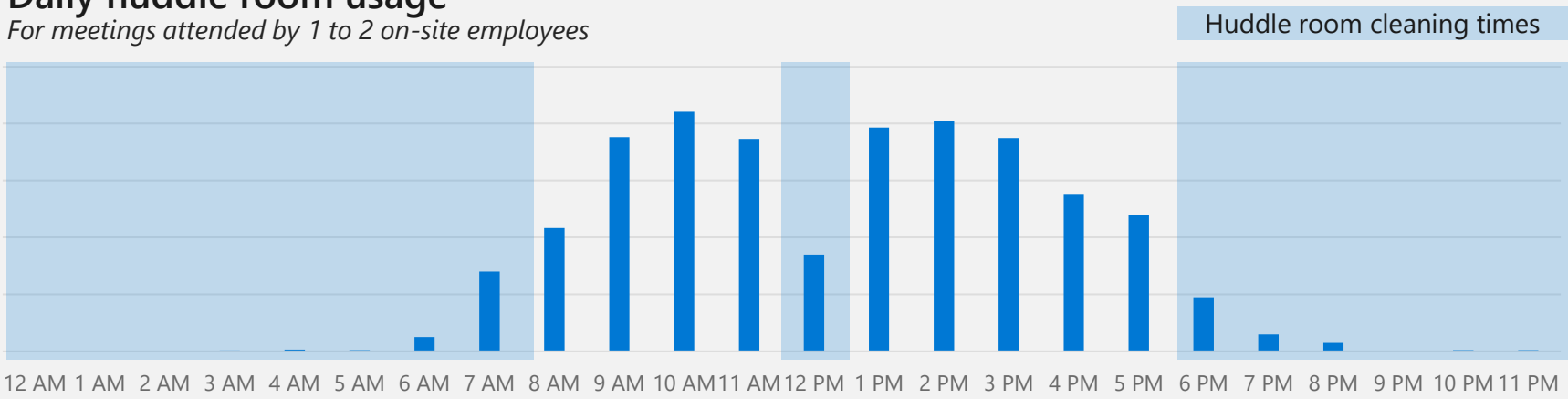
How to apply it

- Encourage teams to take meetings from their seats (with headsets), a phone booth, or a huddle room, particularly if they are not the organizers.
- Set minimum and maximum attendees for each huddle and meeting room, to promote usage of appropriately and safely-sized meeting rooms. Update meeting resources in Azure Active Directory to reflect these sizes.
- Place teams with higher meeting demand in closer proximity to meeting rooms to reduce foot traffic.

Identify most opportune time slots during the day for meeting room sanitization

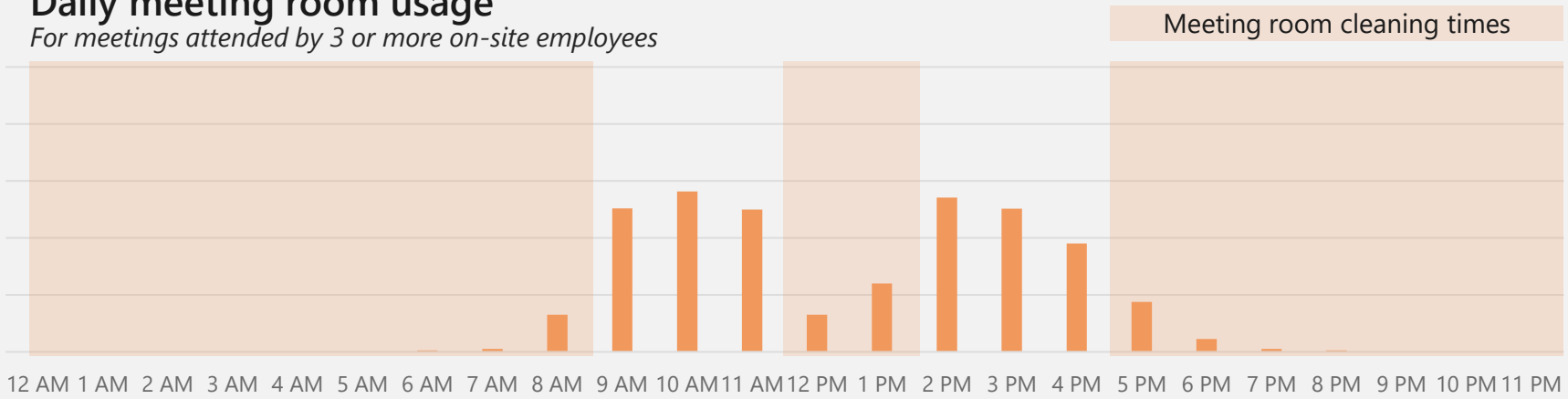
Daily huddle room usage

For meetings attended by 1 to 2 on-site employees



Daily meeting room usage

For meetings attended by 3 or more on-site employees



What it tells us

This report provides the estimated frequency of usage for meeting rooms by hour of day and can be divided by any available meeting size configuration, such as huddle rooms (1 to 2 on-site participants) or meeting rooms of any on-site attendee size.

How to apply it

Consider blocking out "cleaning times" for Outlook meeting room resources to avoid conflicts with required cleanings for meeting rooms.

Post regularly scheduled cleaning signage for each meeting room.

For step-by-step instructions on running this analysis, click here.

Return to worksites

Analyses requirements and instructions

Getting started with your return to worksites analyses

Consider the following when preparing your analyses for returning to each worksite

Key questions

- How many seats are available at each worksite? How many are already allocated to essential workers?
- At what level of the organization are the seat allocation decisions being made at the worksite?
- Is there a preference to return a subset of teams or a proportion of each team to the worksite?
- Are employees returning to the same worksite or to a different one?

Employee scope

- Are all employees associated with each worksite assigned a Workplace Analytics licenses?
- Are all employees using meetings, emails and Teams to collaborate? (Front-line workers may not generate sufficient collaboration signal to benefit from this approach).
- Should contractors and essential workers be included, particularly if they have already been assigned seats?
- Have employees who have indicated personal circumstance prevents their return been excluded from consideration?

Organizational data

- Is the most recent organizational data uploaded into Workplace Analytics?
- Is the organizational field representing worksite teams (at the appropriate allocation level) included in the data uploaded into Workplace Analytics?
- Is the employee worksite location included in the data uploaded into Workplace Analytics?
  - **Note**: If a team is being reassigned to a new worksite, then the current location should be replaced by the new worksite location in the most recent organizational snapshot uploaded into Workplace Analytics.

Timeframe

- What timeframe should be used for this analysis? The most recent 3 months is recommended because it:
  - Reflects the most recent employee population and organizational structure.
  - Provides a more complete collaboration picture (capturing the hallway talk with virtual collaboration).
- Alternatively, a 3 to 6-month timeframe prior to the "shift to remote work" can also be used.

Requirements for producing the analyses in this playbook

Tool access: To use this playbook, you need "Analyst" role permissions in your company's Workplace Analytics tenant. To create seating plans and alternating-shifts schedules, you also need access to Workplace Analytics Azure Templates.

Organizational data requirements: To perform the analyses in this playbook, you must upload two organizational attributes into Workplace Analytics with an effective date that represents the collaboration timeframe of interest:

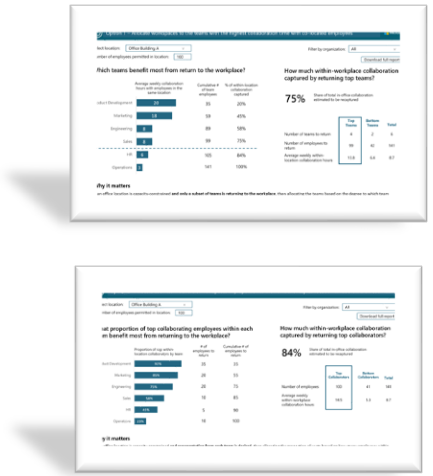
1. **Worksite location** - The attribute that represents the most recent worksite location (or projected location) for each employee.
2. **Team/Organization** - Each employee's team assignment that reflects the organizational level at which the limited-capacity worksite opening decisions are being made.

Return to worksites analyses		Required tools		Inputs required
		Workplace Analytics	Azure Templates[1]	
WHO?	Determine which teams, or alternatively, what proportion of each team, to assign to the limited seats to in each worksite.	√		• Overall number of available (non-essential) employee seats in each limited-capacity worksite
	Map each team to a return-to-worksite option based on their worksite collaboration patterns.			
WHEN?	Use collaboration patterns between on-site teams to develop an alternating-shifts schedule.	√	√	
WHERE?	Develop a worksite seating plan that optimizes collaboration under capacity constraints.	√	√	• Employee seats available in each worksite neighborhood • Distance between neighborhoods in the worksite
HOW?	Estimate meeting room use to ensure that safety protocols can be met.	√		
	Identify most opportune time slots during the day for meeting room sanitization.			

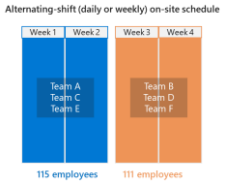
1 Requires Microsoft services to deploy Azure technology

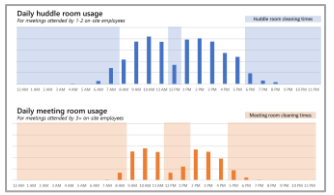
Workplace Analytics queries you need to run for each analysis

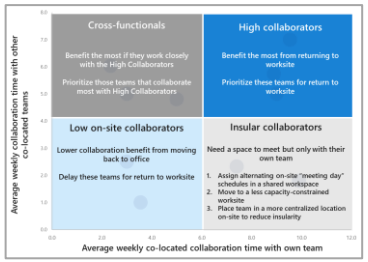
One query across all worksites

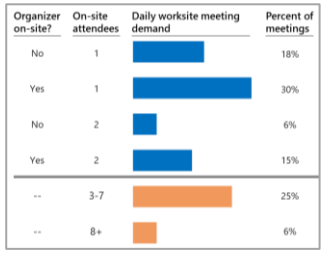


A set of queries for each worksite

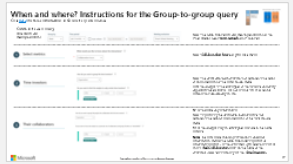








Who?	Who?	When and where?	How?
Workplace Analytics (WpA)	Workplace Analytics	WpA and Azure Templates	Workplace Analytics
One Person-to-group query	Two Person-to-group queries	One Group-to-group query	One Meeting query



Click here for online instructions to create the query and *Return to worksites* Power BI template

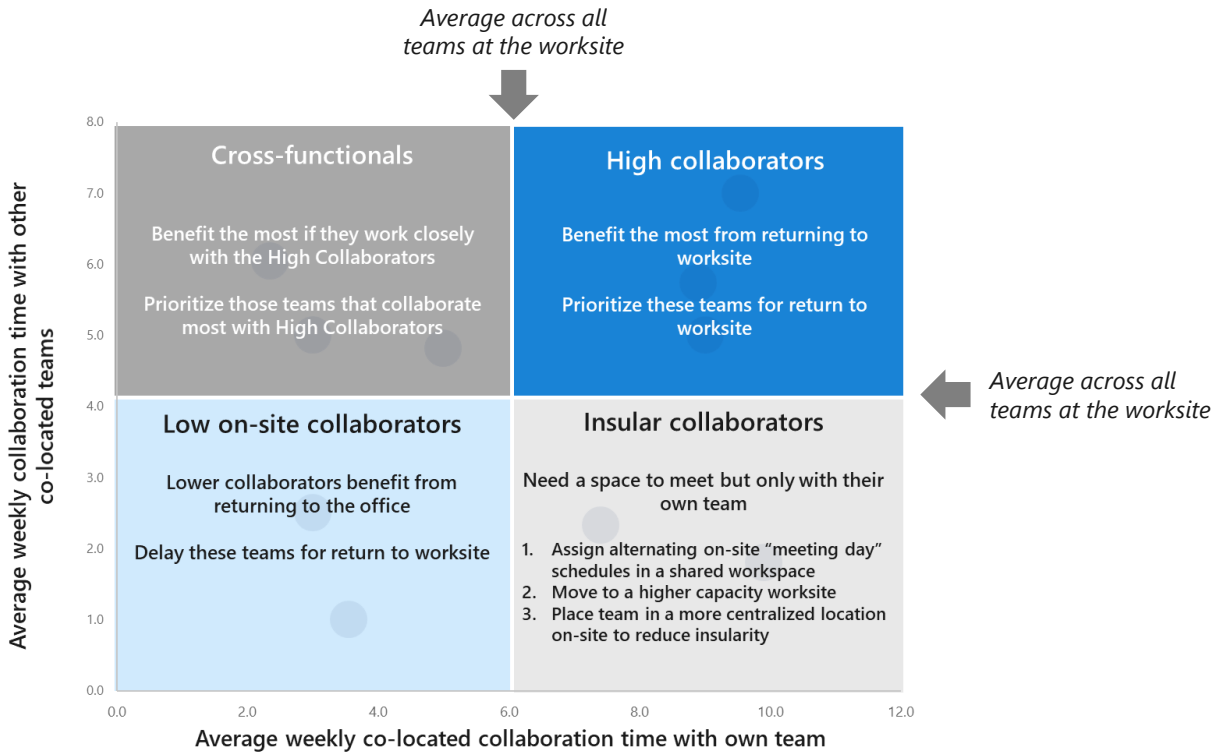
Refer to Supporting query instructions

Map each team to a return-to-worksite option based on their worksite collaboration patterns

Plot each team at the worksite into a two-dimensional plot by using the outcome of the two Person-to-group queries

Data source	Person-to-group query 2
Y-axis	1. **Aggregate by Team:** Average collaboration hours that each team spends with others at the worksite 2. **Calculate by Team:** Team's Y-axis value = Avg. Collab Hours (calculated from Step 1) - "Team's X-axis value"

Each point on the graph represents a team currently assigned to the worksite

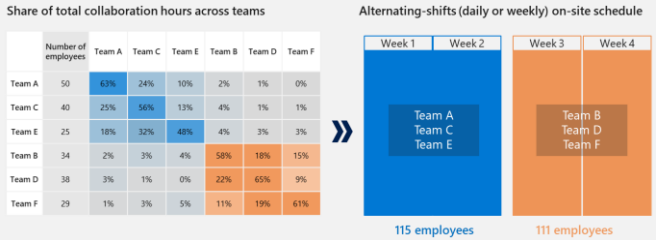


Data source	Person-to-group query 1
X-axis	**Aggregate by Team** - Average collaboration hours that each team spends with their own team at the worksite

Use collaboration patterns between on-site teams to develop an alternating-shifts schedule.

Use the Azure Templates Workspace Planning optimization to create two alternating-shifts schedules for each worksite

Follow the instructions in Workplace Planning Azure Templates to create the alternating shift schedule. The optimization will place teams that collaborate closely together into the same shift.



You will need to input 4 files to create alternative work schedules for each worksite.

Details about the teams in the worksite.

1. Interactions file:

This is the Group-to-Group query you ran in Workplace Analytics.

TimeInvestors_Team	Collaborators_Team	Date	Collaboration_hours
Team A	TeamB	3/15/2020	120
Team A	Team C	3/15/2020	560
Team B	Team C	3/15/2020	320

2. Team size file:

A list all the teams in the worksite and the number of employees allocated to each team in the worksite

Team	Size
Team A	48
Team B	32
Team C	24
Team D	…

Details about the space you are planning to place the teams in:

3. Space Capacity file (you are re-purposing this file to represent two work-shifts)

Represent the space capacity file as two equally sized "spaces" or "shifts" and enter the maximum number of people that can be allocated to the worksite during each shift.

Floor	Capacity
Week1 - Week2	400
Week3 – Week4	400

4. Distance file:

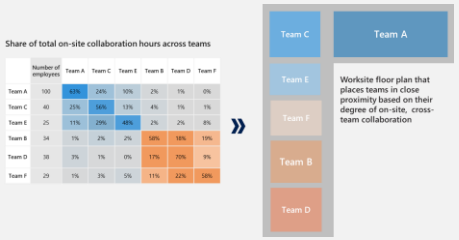
Use any constant to represent "travel distance" between the two shifts (required for the optimization)

	Week1 - Week2	Week3 – Week4
Week1 - Week2	0	10
Week3 – Week4	10	0

Develop a worksite floor plan that optimizes collaboration under capacity constraints

Use the Azure Templates Workspace Planning optimization to create the floor plan for each worksite.

Follow the instructions in [Workplace Planning Azure Template]() for each worksite floor plan. The optimization seats teams that collaborate with each other in close proximity, subject to floor plan neighborhood sizing constraints.



You will need to input four files to create a space plan for each worksite.

Details about the teams in the worksite.

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2. Team size file:

A list of all the teams in the worksite and the number of employees allocated to each team in the worksite.

Team	Size
Team A	48
Team B	32
Team C	24
Team D	…

Details about the space you are planning to place the teams in:

3. Space capacity file:

A list of neighborhoods (a combination of building, floor, and area) and their current capacity.

Floor	Total Capacity
NORTH-FLOOR-1	167
NORTH-FLOOR-2	152
NORTH-FLOOR-3	143
NORTH-FLOOR-4	111
SOUTH-FLOOR-1	165
SOUTH-FLOOR-2	195

4. Distance file:

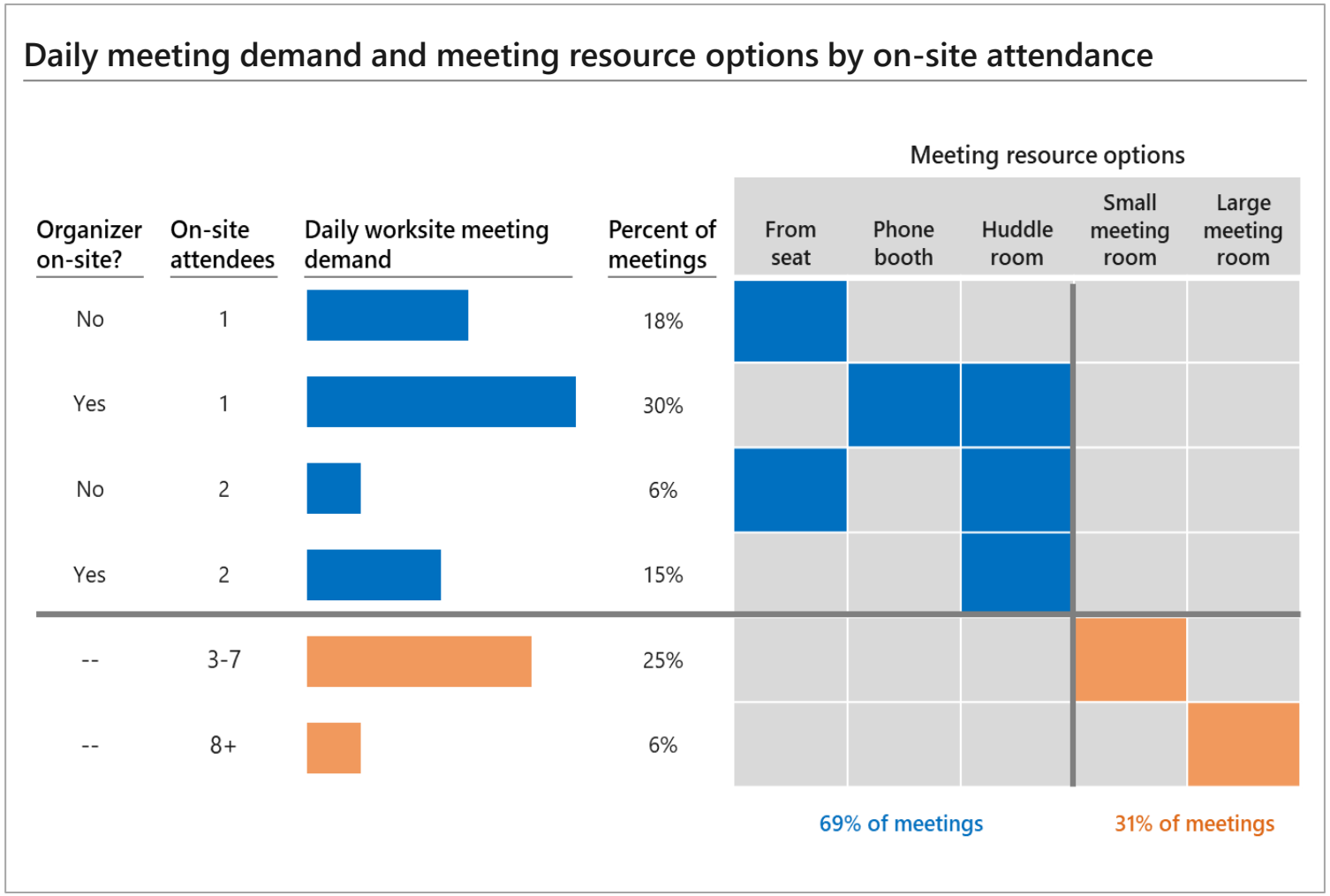
A list of the travel time between neighborhoods.

	NORTH-FLOOR-1	NORTH-FLOOR-2	NORTH-FLOOR-3
NORTH-FLOOR-1	0	0.75	0.75
NORTH-FLOOR-2	0.75	0	0.75
NORTH-FLOOR-3	0.75	0.92	0
NORTH-FLOOR-4	0.92	0.75	0.75
SOUTH-FLOOR-1	1	1.25	1
SOUTH-FLOOR-2	1.25	1.25	1.25

Estimate meeting room use to ensure that safety protocols can be met

Aggregate meetings by organizer location and meeting room size

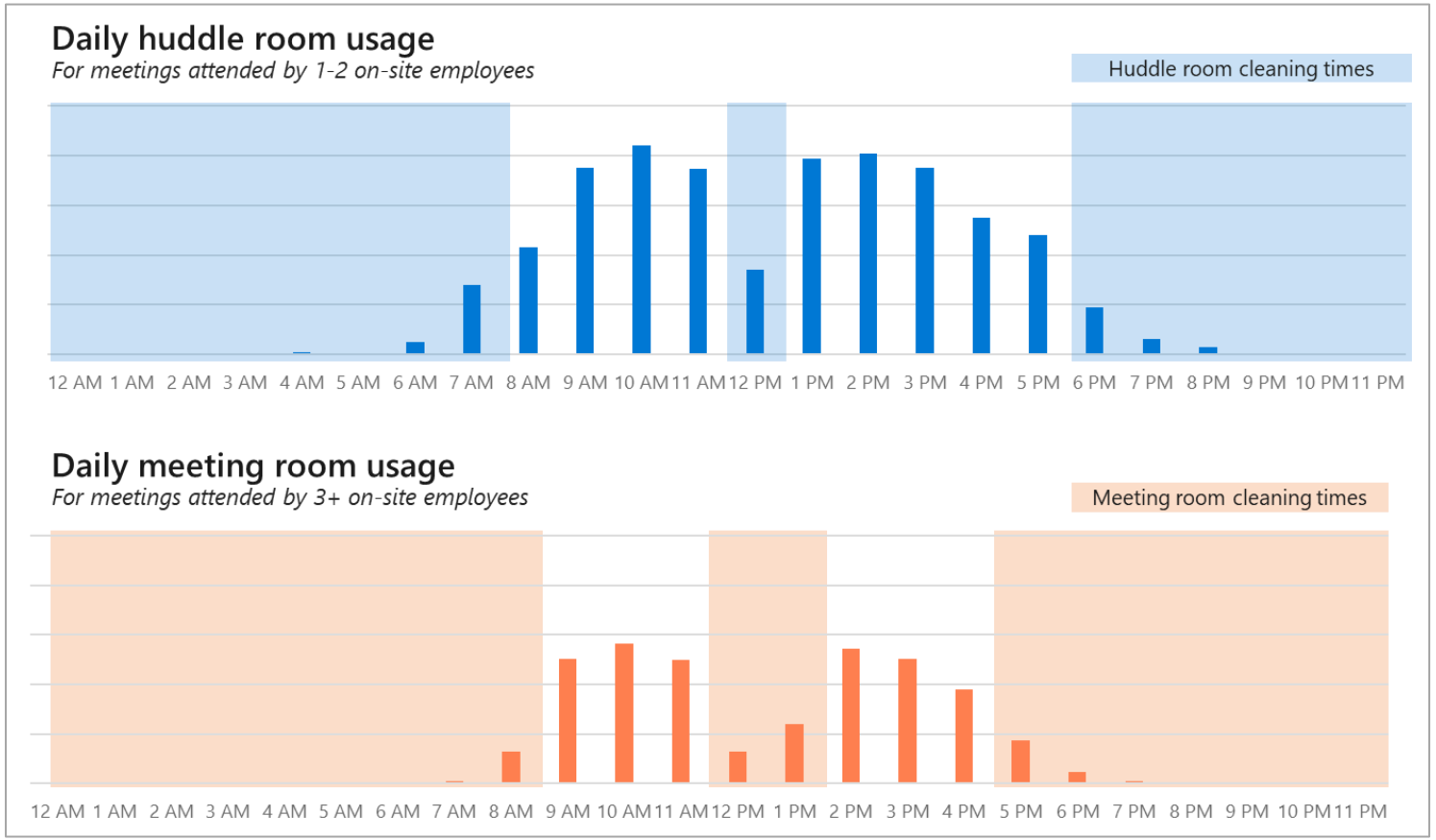
Data source:	Meeting query
Y-axis:	Number of meetings aggregated by two columns in the meeting data: - Organizer worksite location: whether the meeting organizer is assigned to the worksite - The binned number of Worksite Attendees (using meeting sizes that correspond to allotted meeting room capacity, such as 1 person, 2 person, 3-7 persons, or 8+ persons)



Identify most opportune time slots during the day for meeting room sanitization.

Aggregate meetings by hour of day and meeting room size

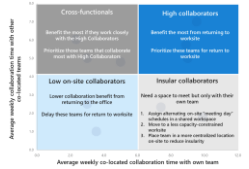
Data source:	Meeting query
X-axis	StartTimeUTC converted to the worksite time zone (and divided into desired time intervals, such as at the top of the hour)
Y-axis:	Number of meetings aggregated by hour of day, and split into desired meeting room size, such as: • For daily huddle room usage, filter by worksite attendees < 3 • For daily meeting room usage, filter by worksite attendees ≥ 3



Supporting query instructions

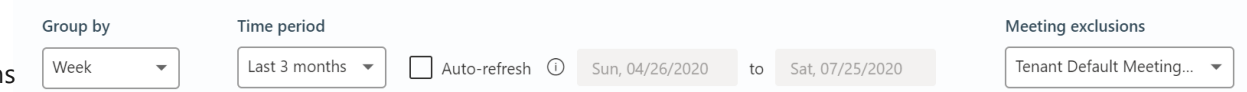
Who? Instructions for two Person-to-group queries

Click here for more details about Person-to-group queries



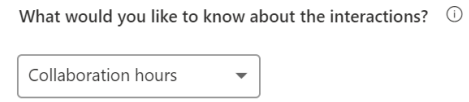
Common to each query

Time frame & meeting exclusions



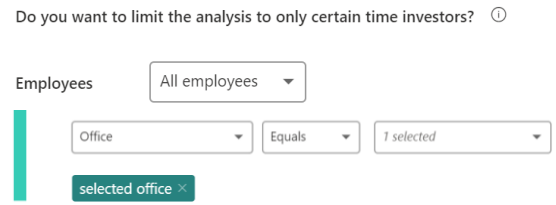
Select a consistent time period and meeting exclusions for both query 1 and 2. Keep **Auto-refresh** as not selected for both queries.

1 Select metrics



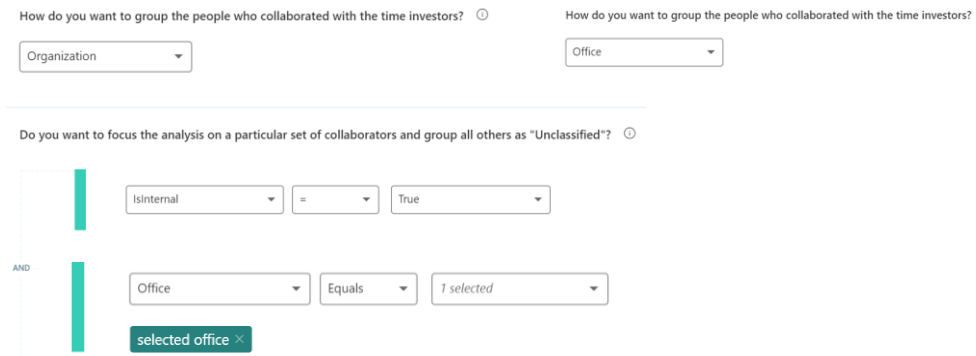
Select **Collaboration hours** as your base metric.

2 Time investors



Select **All employees** and use filter to only include employees at the worksite (such as **Office** = **selected office**). Also consider any other exclusions, such as contractors or essential workers who are already on-site.

3 Their collaborators

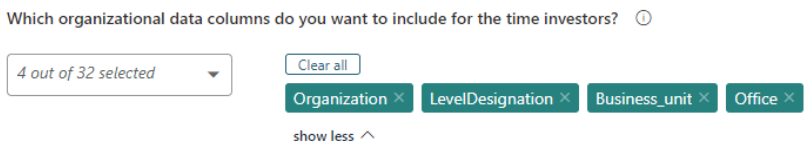


Do not exclude any collaborators.

For Person-to-group query 1, select the applicable team attribute that represents the level at which decisions at the worksite are made, such as **Organization**.
For Person-to-group query 2, select the organizational attribute that represents the worksite, such as **Office**. This is the only parameter difference between the two queries.

For both, focus the analysis only on employees who are located in the same worksite.

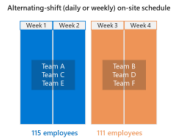
4 Organizational data



At a minimum, include the two organizational attributes that represent the team attribute and worksite location. You can optionally add any others to include in the analysis.

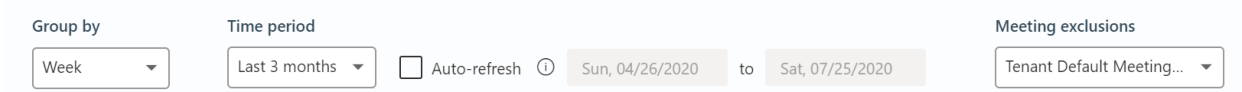
When and where? Instructions for the Group-to-group query

Click here for more information on Group-to-group queries



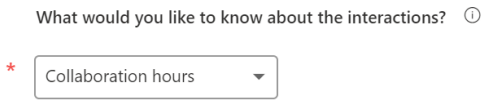
Common to each query

Time period and meeting exclusions



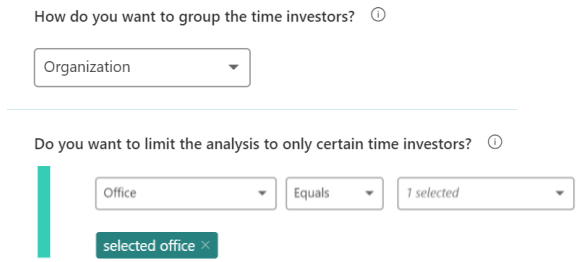
Select the same time period and meeting exclusions as the other queries. Keep **Auto-refresh** as not selected.

1 Select metrics



Select **Collaboration hours** as your base metric.

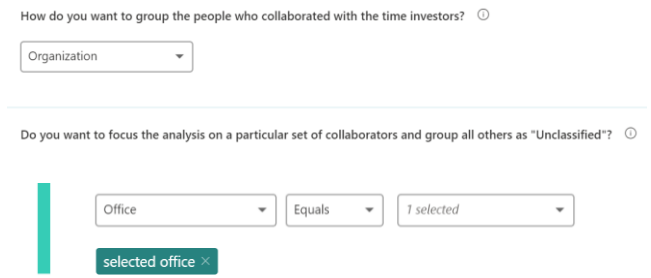
2 Time investors



Select the applicable team attribute that represents the level at which decisions at the worksite are made.

Limit the analysis to the employees at the worksite and apply any additional exclusions, such as contractors or essential workers who are already on-site.

3 Their collaborators



Do not exclude any collaborators.

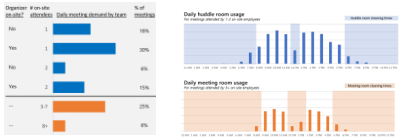
Select to group by the applicable team attribute that represents the level at which decisions at the worksite are made.

Focus the analysis only on employees who are in the same worksite.

Note: The workspace planning tool expects an equal collaboration matrix (the same time investor groups as collaborator groups), so the attribute(s) you selected to focus on for **Their collaborators** must be the same as the attribute(s) selected to filter by for the **Time investors**.

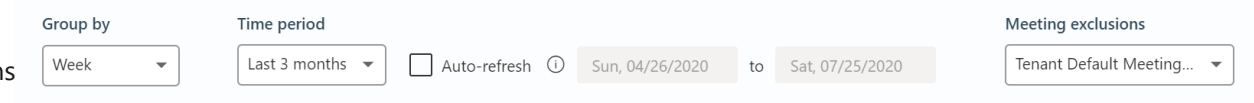
How? Instructions for the Meeting query

Click here for more information on meeting queries



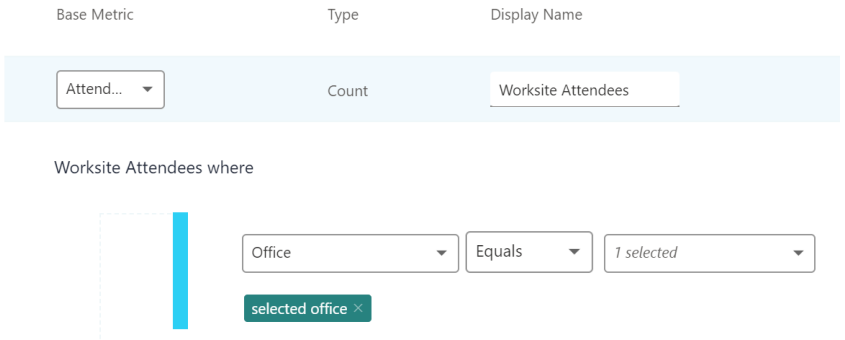
Common to each query

Time period and meeting exclusions



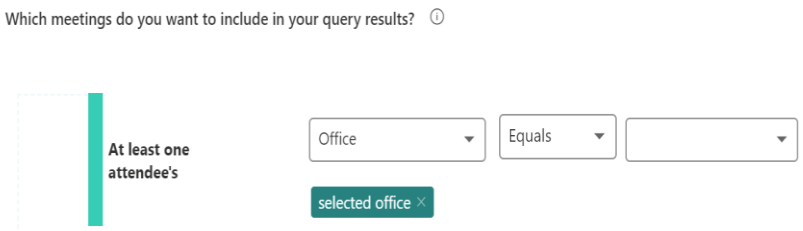
Select the same time period and meeting exclusions as the other queries. Keep **Auto-refresh** as not selected.

1 Select metrics



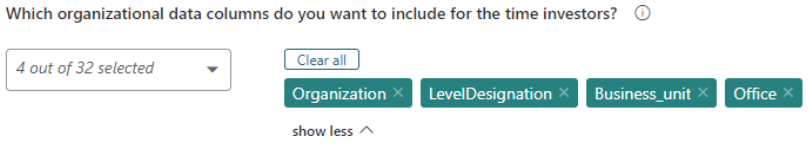
Select the base metric of **Attendees** and customize **Worksite Attendees** by using your worksite location attribute (such as **Office**).

2 Select filters



Filter by meetings with at least one worksite location attendee.

3 Organizational data



At a minimum, include the organizational attribute that represents the worksite location and add any other attributes you want to include in the analysis.