Managing & Measuring Employees

Working From Home Guidelines

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WHAT WE CAN DO

Equip managers to effectively collaborate with team members remotely...
...and provide valuable data that measures employee activity.

85%

of businesses confirm productivity has increased in their company because of greater flexibility.

159%

increase in remote work between 2005 to 2017. In 2015, 3.9 million U.S. workers were working remotely.

During unprecedented times, the need for methodology around the management and measurement of employee performance has become more crucial than ever before. The requirement to work from home has brought to light the need to monitor employee activity to ensure the continued success of the University and various University projects.

This document has been created to present potential solutions that can be utilized by leadership and management during this time and beyond. Many of these solutions are already being utilized in some form by various WesternU departments, and this document provides a guide of compiling these solutions and best practice methodologies.

15%
of a collective organization's time is spent in meetings

42%
increase in team collaboration resulting from **improved productive** meetings

Meetings

Effectively and efficiently executing productivity

Workplace meetings are an important element of business management. Meetings enable you and your employees to communicate and share information, solve problems or resolve disputes, improve performance, build teamwork and move projects forward.The Center for Innovation utilizes many different types of meetings based on SCRUM, Project Management, Agile, and Lean Six Sigma best practices.

There are meetings held first thing every Monday Morning, "Monday Huddles", which is an all-hands meeting to discuss the detailed target list of key accomplishments for the week for each team member. Towards the end of the week, there is a follow-up meeting that is held on Thursday, which is another all-hands meeting that reviews all progress and status updates of each team member, what is falling through the cracks, and remedies needed. In addition, as priorities may change, it is also important to hold quick Scrum-based calls, which are quick 15-minute meetings based on SCRUM methodologies.

Daily Scrum Meeting
These meetings are held once a day and should be used to prioritize and assign work for the next 24 hours. These meetings are also known as daily standing meetings or check-ins. These time-boxed meetings should be concise and to the point. They are usually no longer than 15 minutes. This gives enough time for project lead and team members to share very specific tasks for the day and update the team on any new information since the last meeting.

1-1 Meetings
Annual performance reviews are not as optimal as they once were. When managing a remote workforce, you must use constant communication channels in order to meet project deadlines. Team meetings are useful for managing large projects, but how do you know how each individual team member is feeling and what specific tasks are needed from them? Utilizing weekly one-to-one meetings with your direct reports ensure your team members are feeling empowered to make important decisions, while allowing them personal time to discuss any issues on a more intimate level. One-to-one meetings also give managers insight into individual team members' performance and can be used to evaluate strengths and weaknesses.

https://hbr.org/2017/07/stop-the-meeting-madness

Communication Methods & Technologies

Valuable tools in determining the level of activity for each employee.

One important aspect to being able to manage and measure your employees is to stay connected to them throughout the day while also having the ability to monitor their activity. One of the easiest ways to do this is through IM/Chat applications. These applications not only allow you quick access to communicate with your employees, but also provide a status update on the individual (online, offline, away, etc.)

This will help give management a valuable tool in determining the level of activity for each individual employee. If this is to be done correctly, it is important that the head of each department make it very clear that every individual must be logged into their IM/Chat application as soon as they start work, and only log out when on a break, lunch, out of office, or are done for the day. This allows management to be able to readily access each employee and while also making sure they are actively productive.

There are a variety of tools that can be used here, and a few of them are already in use at WesternU. It is important to find an application that works best for your specific department. A few popular selections include Microsoft Teams, Skype, and Zoom.

Microsoft Teams
As an all-in-one solution, Teams not only provides a robust chat feature, it can turn a chat into a video conference at the touch of a button. Ease of collaboration is definitely their best feature, allowing the creation of 'project' rooms, sharing and storing documents, and instant communication with all team members.

Skype Instant Messenger
While mostly known as a video conference application, Skype also has an excellent chat feature. Team members and management can easily search for their colleagues and start an individual chat or group chat to discuss projects.

Zoom
Well-known throughout WesternU as the go-to of video conferencing, Zoom is effective in hosting virtual meetings, webinars, phone calls, and includes a chat feature with file sharing capabilities.

What's Next?

It will be important that departments check with IT Support on which solution meets their needs and management obtain buy-in from their employees, who will be daily users of the platform.

Collaboration Platforms

Valuable tools in determining the level of activity for each employee.

There are countless various ways for collaboration in our virtual era of technology today. WesternU has secured licensing for multiple online platform solutions, but surveys conducted and user recommendations filter through the top three platforms that are user-friendly and efficient:

Google Drive

Google Drive includes Google Docs, Google Sheets, and Google Slides, which allow live collaboration between team members to work on a file at the same time.

SharePoint

Microsoft SharePoint is a vastly popular platform for storing files, creating "sites", project pages and folders. Teams can select which are private and publicly shared.

Team Dynamix

Team Dynamix is a project management and ticketing platform that creates project spaces, assigns tasks and resources, and allocates time and data reporting.

Remote Management Training

How to manage a remote work force

Managers should have specific training fundamentals in order to manage a remote work force. WesternU's LinkedIn Learning platform is available for everyone to utilize and learn.

Managers and Employees should both obtain training for working remotely. Management needs to complete training to provide proper remote management and employees need to complete training on how to effectively work remotely.

There are also multiple levels of certification available to those who desire to extend their learnings:

Beginner
Basic fundamental training

Intermediate
Measurements & productivity

Advanced
SCRUM, Lean Six Sigma

Knowledge Center

In our digital age, many sources of tutorials and tips are available on Linda.com, LinkedIn Learning, and even YouTube. These sources are great for learning about University-specific priorities, management skills, and remote working. This is a type of knowledge center that is widely and publicly available to our community.

Management Consulting

The Center for Innovation provides traditional strategic excellence resources inside the context of enterprise innovation. Services include assistance with special projects large and small.

We are happy to provide feedback and guidance on initiatives, build presentations, create project plans, or conduct research and gather resources to advance our great mission.

Certified Management Consulting services include knowledge and experience in the areas of financial planning, analysis, control, decision support, and professional ethics. The goal for management consulting services is to provide advisory services to departments and colleges, specific to productivity and team management best practices.

Did you know?

The Center provides Shared Services for WesternU that include Certified Management Consulting, Project Management, Public Speaking & Presentations, Process Improvement, Innovation, and Executive Development Coaching.

Plan Development
a critical component of process improvement

A work plan is a critical component of determining job functions and levels of management needed. The goal is to develop a clear work plan to guide the University over the next phase of uncertainty as we continue a path of remote working.

It is important to architect how an organization manages its employees and show that they are being given the directions and resources to continue successfully moving forward.

If organizational units cannot produce accountability measurements, task or activity reporting, or fail to incorporate any deliverables, we can help assess their landscape by identifying a framework, training, and reportability.

A simple plan can begin with setting up actionable items and a sample workflow assessment.

Planning of work is the backbone of any project, big or small.

Workflow Assessment

1

Assess
Assess the task or project and allocate the resources appropriate to the expected return on the up-front "investments" of time, money staffing, and mission.

2

Establish Goals & Objectives
Brainstorm and sort the list of tasks required to achieve the goal. Objectives are activities and tactics needed to achieve the goal.

3

Establish Owners, Team Members
The success of work plans is dependent upon someone owning the plan and ensuring the plan is implemented.

4

Develop SMART Goals
Take each conceptual objective and create a clear tactical objective statement based on:

Specific: "who, what, and how much,"
Measurable: Define what the end result looks like
Achievable: Ensure capacity and capability
Realistic: Ensure resources are available
Time-bound: define the objective's ending point

5

Create Action Steps
The essential framework is to identify the action steps, due date, team lead, and accountability measures or milestones.

6

Create the Work Plan
The final step of the process is to create a formal work plan, implementing this six-step process, which can even be summarized on one page.

The 4Ds of **TIME MANAGEMENT**

Do, Delete, Defer, Delegate

A productive work day begins by starting the day off through prioritizing your project list into High, Medium and Low Priorities. Quick tasks usually take two minutes or less. Begin your day by looking over your list of tasks and filter them through the 4Ds, a simple and effective time management method: Do, Delete, Defer, Delegate.

" **84% of business owners are working over 40 hours per week and 1 in every 10 feels continuously overwhelmed by their responsibilities."**

If you want to avoid becoming a victim of poor time management practices, then there are four D's you have to master:

Do

Before deciding to do a task, utilize a two-minute rule as a decision framework. You can accomplish many amazing things in just 120 seconds: write an email, make a quick phone call, complete a ticket, etc.

Delete

Many productivity consultants recommend approaching this D through Lean Six Sigma best practices, such as the Pareto Principle. Ask yourself: Will this activity help me get the long-term result I or we want?

Defer

To defer means saying, "Not right now" rather than, "Not ever." if a task takes longer than two minutes to deal with, you can defer and categorize it to a Medium or Low Priority task. It is important to capture and defer new requests so you can refocus on what is currently in front of you.

Delegate

To delegate effectively, break down your project or task step-by-step and detailing what the outcome looks like. Consider if your time is spent more effectively by delegating or doing. For example, consider delegate paying a supplier and prioritize phoning an unhappy customer.

Setting & Triaging Priorities
Simple rules to follow for a productive workflow

There are truthfully two types of work organizations: **busy or productive.** A busy organization has a high pace of work and consistent activity levels, but the work environment is considered very reactive. Employees are constantly on the move throughout the day, jumping from one task to the next without any rhyme or reason. The feeling of many tasks completed results with finding that you were simply treading water. Your task list started with 47 items in the morning with 52 more at the end of the day.

A productive organization is crystal clear on its priorities at all different types of levels. This type of organization has a clear distinction between "Must Do", "Should Do", and "Could Do" priorities.

MUST DO
HIGH PRIORITY

These are top priorities that must be accomplished - the critical work that directly contributes to your goal achievement. Let's define this as a "High Priority" task, taking the lead on the list of tasks that you have on hand, always placed first on your list.

SHOULD DO
MEDIUM PRIORITY

The Should Do's are probably important, but not necessarily urgent. Let's label this as a "Medium Priority" task, often not as time-critical or there may be another way to satisfy the requirement so that it can be held back until a future date.

COULD DO
LOW PRIORITY

The Could Do's are on the horizon, but need to be put aside or until the after High and Medium Priority tasks are completed. These are "Low Priority" tasks included if time and resources permit.

90% of employees say remote working would increase employee morale, while 77% say working remotely may lead to lower operating costs.

www.flexjobs.com/blog/post/remote-work-statistics/

Measuring Productivity

Where we are now & where we want to be

All productivity measurements must align with stated University priorities and stay on mission by comparing activities with stated departmental and University priorities. We need to evaluate current statuses and follow work plans to ensure we get to where we want to be.

Establishing quality baselines and setting ambitious, yet achievable, targets are **essential** for the **successful** management not only of remote work, but overall **productivity** rates.

Baseline Assessment & Target Identification

Measurement of productivity must include baselining. A baseline is the value of a performance indicator before the implementation of projects or activities, while a target is the specific, planned level of result to be achieved within an explicit timeframe.

A good habit to follow would be to identify an expected baseline and targets early in the week and review them with your team first thing on Monday mornings, during a "Monday Huddle" meeting. Give each employee their voice in explaining their priorities for the week and set deadlines, timeframes, and strategies of how to obtain their targets. These baselines and targets must be checked against stated University and departmental priorities.

Towards the end of the week, such as Thursday mornings, meet with your team for status updates and compare those baselines of what would be reasonably expected with the actual productivity and yield. Comparing baselines to targets is an effective method of evaluating expectations of employee's performance and yield.

Through a measurement process of remote working, management can easily view who is contributing to the mission at a time of scarcity.

Measuring productivity can easily be evaluated through measurement tools listed in previous pages. Examples include Project Management Gantt Charts and SCRUM Sprint templates.

Center for Innovation
2020 & Beyond, Major Projects

Measurement Tools

The Center for Innovation's Shared Services provide various types of toolkits needed for each department or college. Each toolkit can be customized to each department or college's needs and tailored with different types of templates or forms. Forms and templates can be generated via Project Management, Agile, SCRUM, and Lean Six Sigma methodologies to improve processes and provide performance measurements. Some forms and template examples include Project Management Gantt chart customization services, SCRUM Sprint Sheets, Adobe InDesign brochure templates, to name a few.

Did you know?

Toolkits aggregate resources and would in turn provide effective employee utilization and communication. The Center for Innovation can provide many effective tools, templates, and other resources to assist with this.

Shared Services

Three components of CFI Shared Services

The Center for Innovation's priority is to serve the WesternU community and collaborate to advance its great mission. There are three main components of shared service categories relevant to contributing to an effective remote work environment and beyond.

Management

Business management is the process by which an organization causes its employees to produce the greatest results with the least amount of effort using the resources available. Great management results from utilizing business management best practices for success. The Center provides management consulting based on current business management expertise, Lean methodologies, project management best practices.

Measurement

The Center for Innovation retains Certified Management Consultants trained in the knowledge and experience in the areas of financial planning, analysis, control, and decision support, which all utilize performance measurement. Measuring and managing employee performance is the core of performance management, and is the key to growing an organization. The Center can provide ready-made and custom templates and tools to assist with your department or unit to drive success and growth.

Training

The Center is also available to assist with Workforce Assessment Training, which will match learning objectives to the current role or position. Continuous assessment and training need to occur in order to effectively determine if employees have met those learning objectives. Training and assessments can be customized to each individual or department unit.

Template Examples

Tools and templates can be customized and tailored to each individual or department unit.

Please feel free to reach out to the Center for Innovation for assistance with creating a unique Weekly Sprint Template, Project Gantt Chart, or any other customized template that you may need.
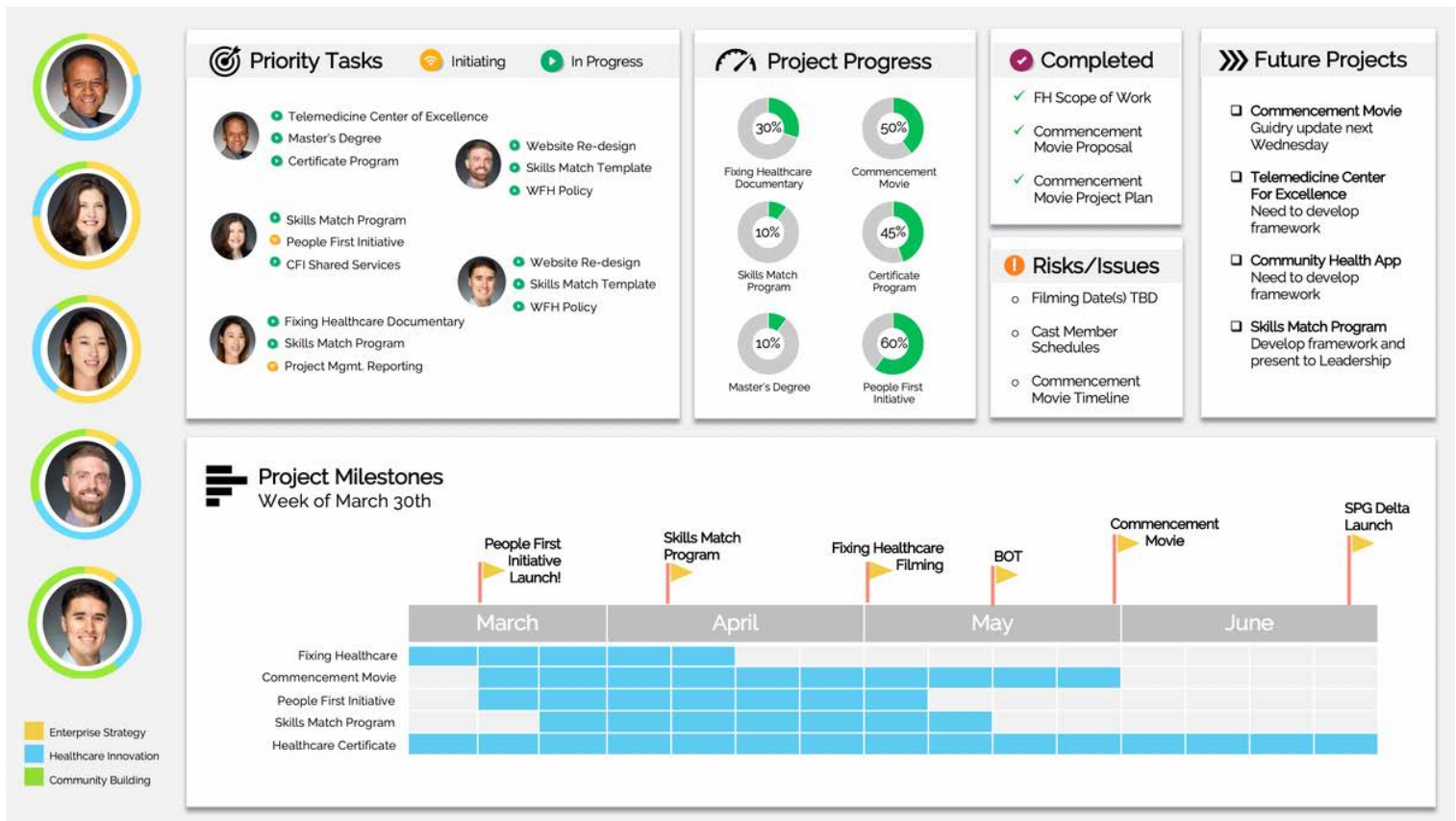
Let's Get Started

Use this checklist to get started with managing your remote team:

☐ Conduct ideation workshop with your team to develop your new collaborative workflows. This will ensure team buy-in and engagement.

☐ Build out customized project and sprint plans on shared docs

☐ Schedule recurring check-ins to review sprints, targets, baselines

☐ Track your team's progress and practice continuous improvement

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