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The Productive Leader

Releasing time to lead™

Baseline Data Collection

Guide for Project Managers and Facilitators updated Feb 2012

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Introduction

- Collecting Baseline Data is crucial in ensuring you have a basis for measuring improvement.
- This data collection has been kept as simple as possible and should be completed in advance of the Leadership Team Coaching session.
- Results can also be discussed in the Email and Meetings Management sessions, to set the scene as to how the team are currently performing before focusing on what best practice tells us.

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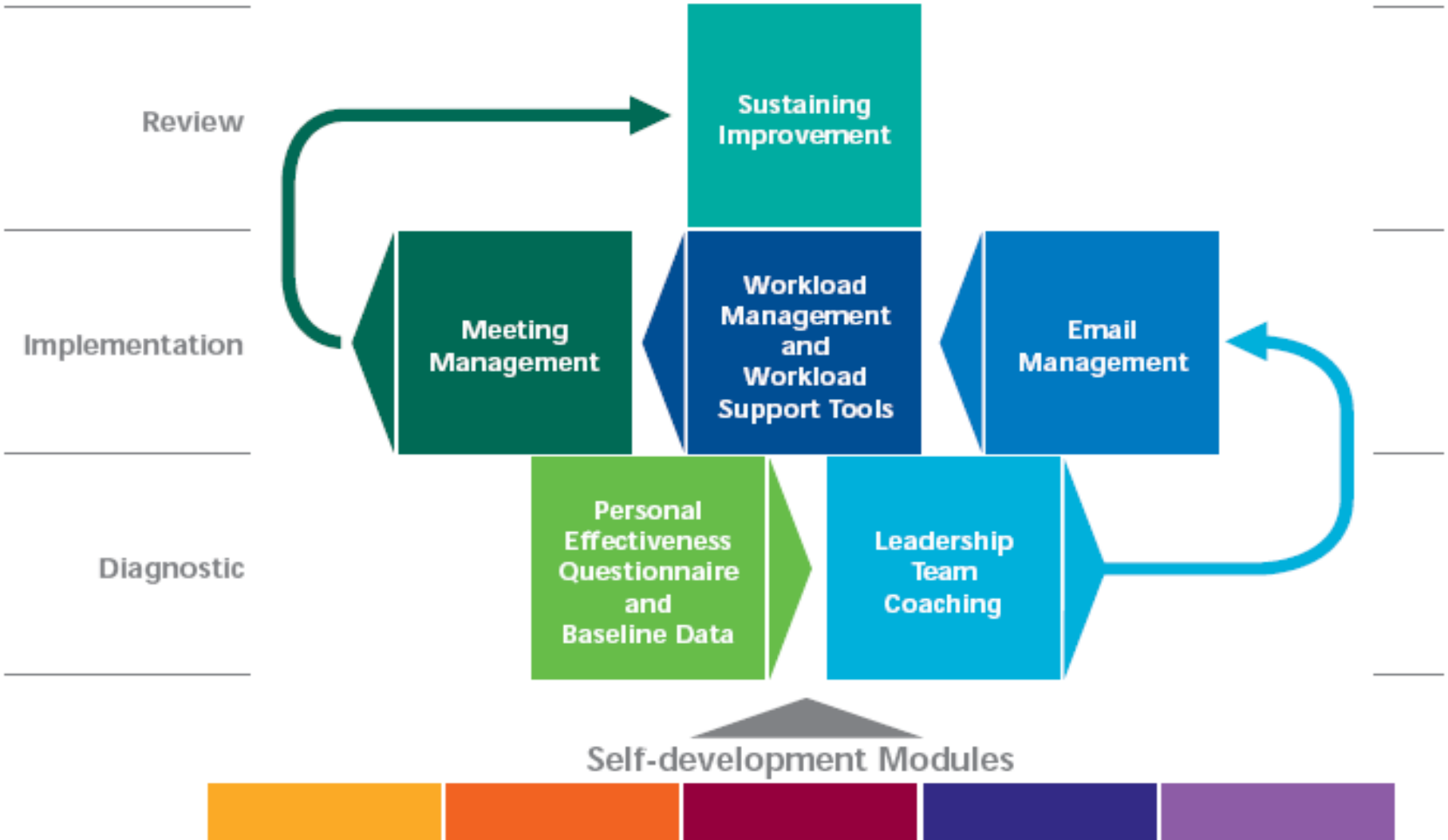
Baseline data collection is one of the first activities for participants in the programme



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Managing the Baseline Data Collection process

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Baseline Data documents you will need to access

There are two spreadsheets which you need to complete the process:

- **Baseline Data Collection - Participant -** this is the version you will be sending to all participants to complete (*please note previously there was one sheet for Leaders and one for PAs – this new sheet is for all participants).*

- **Baseline Data Collection - Analysis Sheet** – this is the document facilitators will use to collate the results and collate the team profile

- Both spreadsheets were updated in February 2012.

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Instructions for setting up the Baseline Data Collection sheets, and specifying additional questions if required

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Overview of the instructions

- **Instructions for inserting your email address and submission deadline into the baseline data collection sheet**

- Open the **Baseline Data Collection –** spreadsheet, enable macros*, and press **'Next'**
- Select '**Tools**', **'Protection'** then '**Unprotect Sheet**'
- Complete the following details.
  - 'Project manager's email' - enter your email address
  - 'Deadline for submission ' - enter the date that the participant must submit their results by
  - 'Number of days to collect data for' – The total number of days (up to 10, minimum of 5) for which the participant must collect data
- Then go back to **'Tools'**, '**Protection'** select '**Protect Sheet**' and then **'Ok'**

See the following pages for step by step visual instructions

**** See slide 8 for details***

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Open the spreadsheet, enable macros and press 'Next'

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Click "Options"

Select "Enable this content"

Then click "OK"

And "Next"

Security Warning Macros have been disabled. Options...

Microsoft Office Security Options

Security Alert - Macro

Macro

Macros have been disabled. Macros might contain viruses or other security hazards. Do not enable this content unless you trust the source of this file.

Warning: It is not possible to determine that this content came from a trustworthy source. You should leave this content disabled unless the content provides critical functionality and you trust its source.

More information

File Path: C:\Documents and Settings\allisonn\Desktop\Productive Leader\Baseline data collection - Leader.xls

Help protect me from unknown content (recommended)

Enable this content

Open the Trust Center

OK

Cancel

Next

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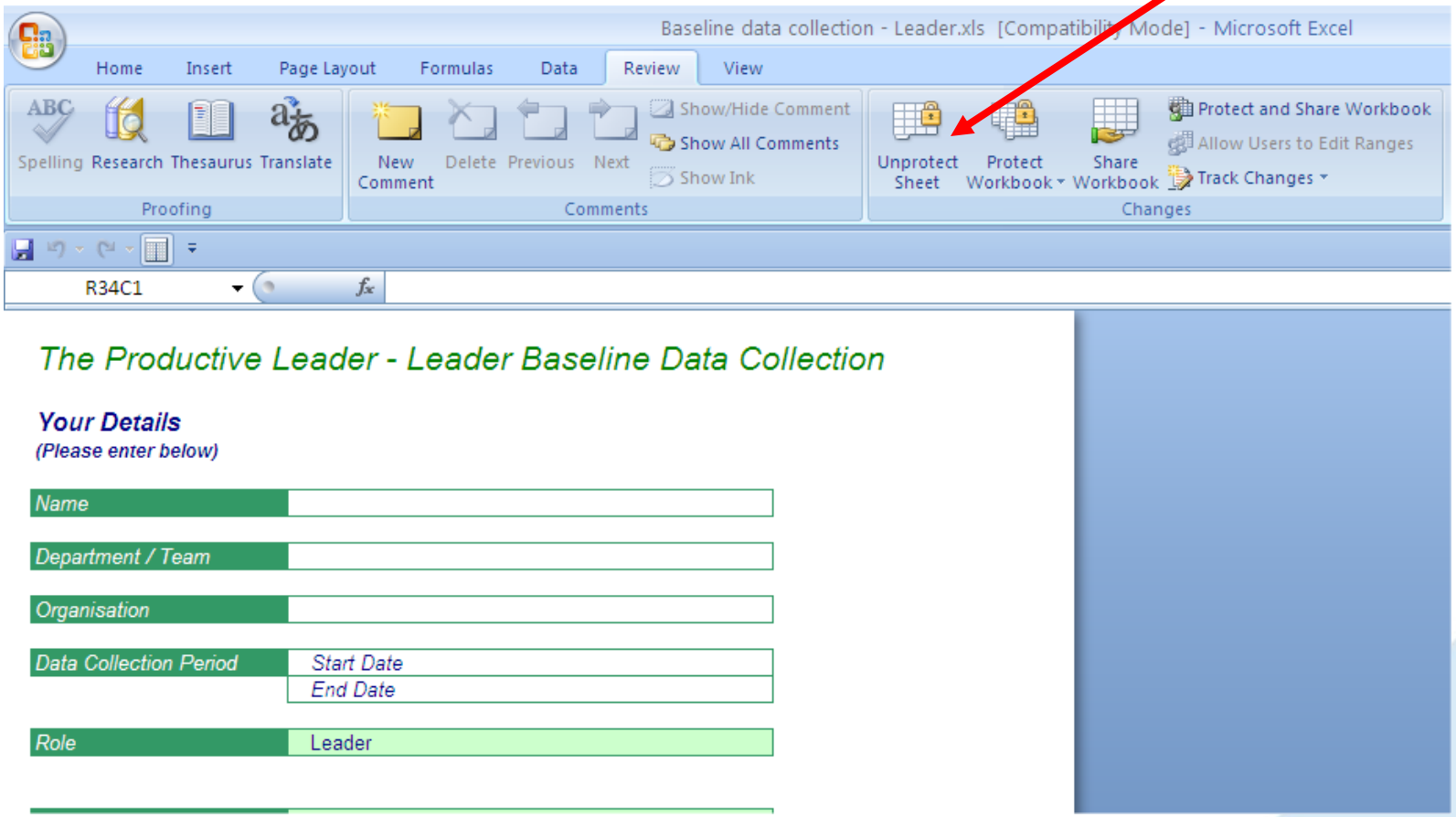
Select 'Review', then 'Unprotect Sheet'



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How to set up the "Start" page

The Productive Leader - Leader Baseline Data Collection

Your Details
(Please enter below)

Name	
Department / Team	
Organisation	
Data Collection Period	*Start Date* *End Date* *Note: The days for which the data is collected do not have to be consecutive*
Role	Leader
*Project Manager's email**	
*Deadline for Submission**	
*Number of days to collect data for**	

* Your Project Manager/Facilitator will provide this information. Pleae contact them if you are unable to complete this sheet or require assisstance.

Previous Begin

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Enter your email address

Enter the deadline for participants to return the baseline data collection spreadsheets

Enter the total number of days that you require the participants to collect data

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Go to 'Review', select 'Protect Sheet' and then 'OK'

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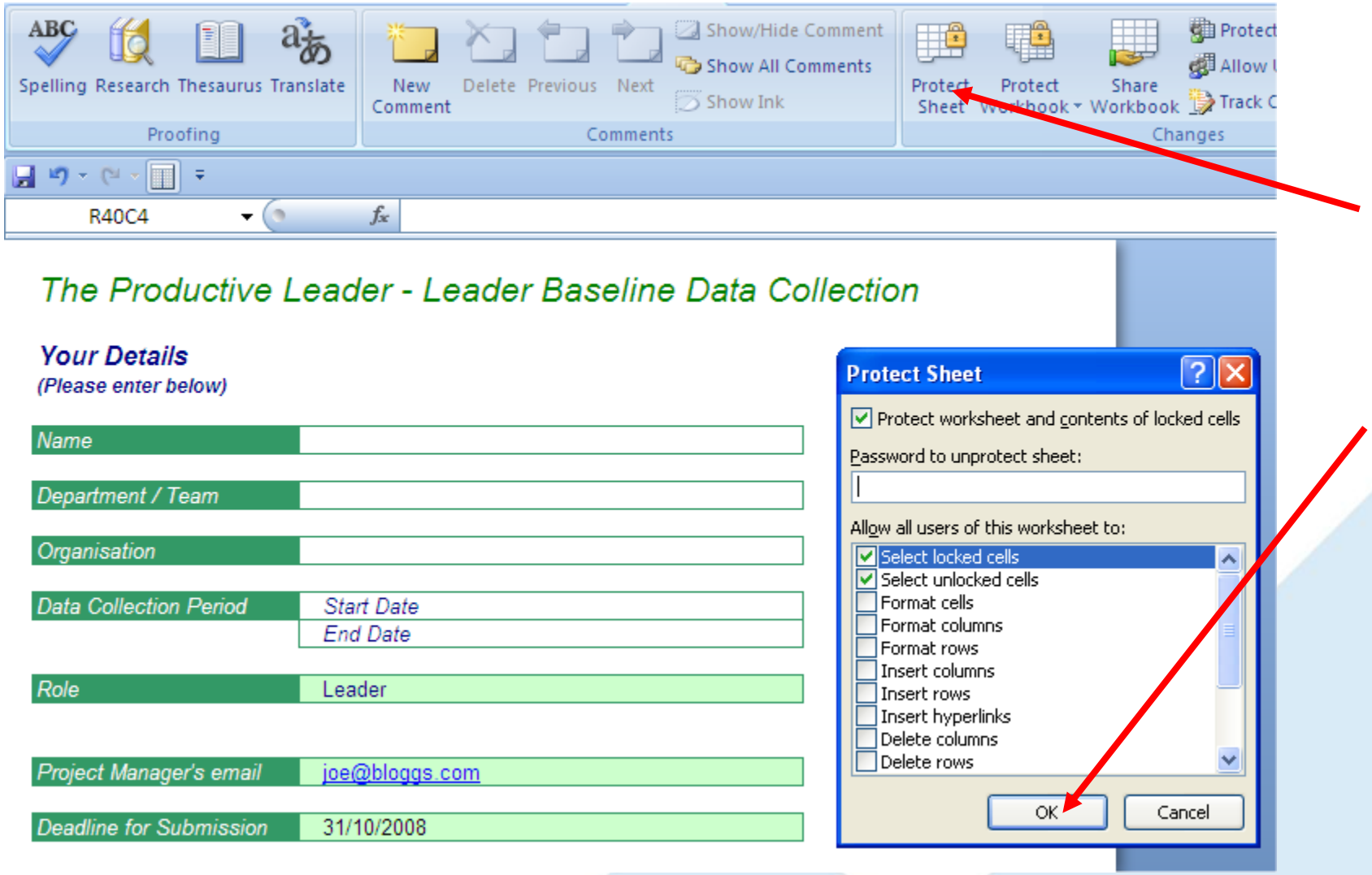

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To specify additional questions that you would like to ask - click on the 'Data Collection' sheet, and update the text in the cells shown below

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17	3	How many meetings did you attend that ended on time?
18	4	How many minutes, papers or agendas did you receive each day?
19	5	How many minutes, papers or agendas did you receive less than 48 hours before the scheduled meeting?
20	**Additional Data**	
21	1	Optional Question 1
22	2	Optional Question 2
23		
24		
25	Facilitator note: If you need to capture addition data please populate the two optional question fields above before sending to particip	
26		
27		
28		

Instructions | Start | Data Collection | Leader data charts emails

Ready

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Instructions for creating the team profile

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Overview of the instructions

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Instructions for creating the team profiles

- Open the first spreadsheet that is completed by the leader and returned to you
- Select the sheet titled 'Data Collection'
- Click on the cell shown (the first row of the 'Total' column)
- Select all of the cells from row 8 to row 24 – which includes the 'Number of Days Completed' cell
- Right click on one of the selected cells and select '**Copy**'
- Open the spreadsheet 'Baseline data analysis sheet - Facilitator' and select the 'Leader Baseline Data' tab
- Select the cell next to the first question in the 'Name' column as shown below
- Right click and select 'Paste Special'
- In the 'Paste' section select 'Values' then click 'OK'
- The results from the individuals spreadsheet should now appear in the selected column
- Put the name into row 8, as shown below
- Undertake the same process for the remaining leaders' spreadsheets*

See the following pages for step by step visual instructions

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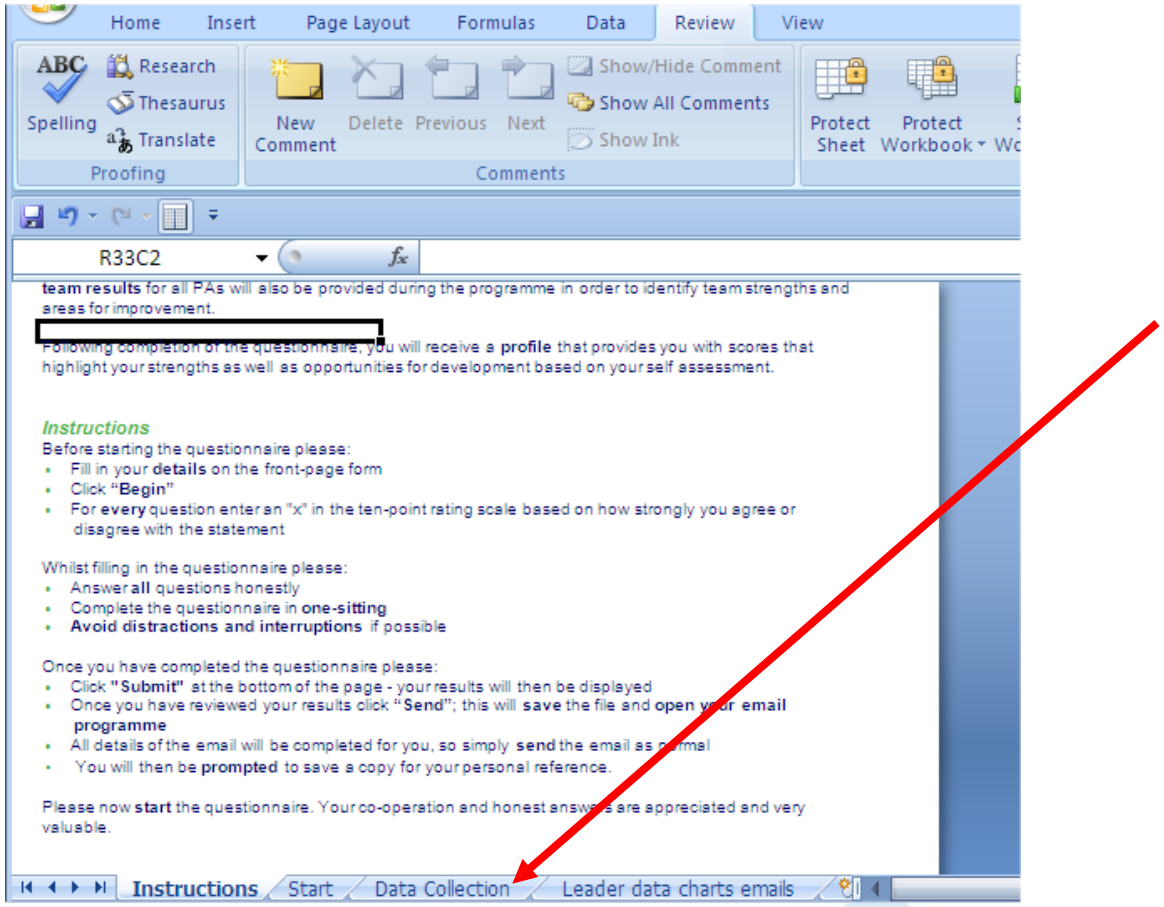
Select the 'Data Collection' sheet tab



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Click on the cell shown (the first row of the 'Total' column)

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Leader Baseline data collection sheet

Previous | Submit

Day

Question	Day 1 (Date)	Day 2 (Date)	Day 3 (Date)	Day 4 (Date)	Day 5 (Date)	Day 6 (Date)	Day 7 (Date)	Day 8 (Date)	Day 9 (Date)	Day 10 (Date)	Total	Daily Average
Email												
1 What is the total number of emails you have received during the week?	75	85	68	83	47						358	71.60
2 How many emails did you receive which you feel you were inappropriately copied into?	10	4	10	13	4						41	8.20
3 How many emails have you received with attachments?	18	16	12	8	14						68	13.60
4 What is the total number of emails you have sent during this week?	27	48	39	49	0						163	32.60
5 How many emails did you send that had a clear subject line, and clear stated action required with timescales?	9	14	10	8	0						41	8.20
6 How many emails have you sent with attachments?	4	7	9	14	0						34	6.80
Meetings												
1 How many meetings did you attend during the course of the week?	7	8	6	7	4						32	6.40
2 How many meetings did you attend that started on time?	5	1	2	7	6						21	4.20
3 How many meetings did you attend that ended on time?	4	6	4	8	7						29	5.80
4 How many minutes, papers or agendas did you receive during the week?	4	5	1	2	2						14	2.80
5 How many minutes, papers or agendas did you receive less than 48 hours before the scheduled meeting?	4	1	0	1	2						8	1.60
Additional Data												
1 Optional Question 1	42	60	78	44	76						300	60.00
2 Optional Question 2	37	69	59	97	22						284	56.80
										Number of Days Completed	5	

Facilitator note: If you need to capture addition data please populate the two optional question fields above before sending to participants

Instructions | Start | Data Collection | Leader data charts emails

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Select all of the cells from row 8 to row 24 – which includes the 'Number of Days Completed' cell

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Leader Baseline data collection sheet

Previous | Submit

Question	Day 1 (Date)	Day 2 (Date)	Day 3 (Date)	Day 4 (Date)	Day 5 (Date)	Day 6 (Date)	Day 7 (Date)	Day 8 (Date)	Day 9 (Date)	Day 10 (Date)	Total	Daily Average
Email												
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3 How many emails have you received with attachments?	18	16	12	8	14						68	13.60
4 What is the total number of emails you have sent during this week?	27	48	39	49	0						163	32.60
5 How many emails did you send that had a clear subject line, and clear stated action required with timescales?	9	14	10	8	0						41	8.20
6 How many emails have you sent with attachments?	4	7	9	14	0						34	6.80
Meetings												
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4 How many minutes, papers or agendas did you receive during the week?	4	5	1	2	2						14	2.80
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Additional Data												
1 Optional Question 1	42	60	78	44	76						300	60.00
2 Optional Question 2	37	69	59	97	22						284	56.80
										Number of Days Completed	5	

Facilitator note: If you need to capture addition data please populate the two optional question fields above before sending to participants

Instructions | Start | Data Collection | Leader data charts emails

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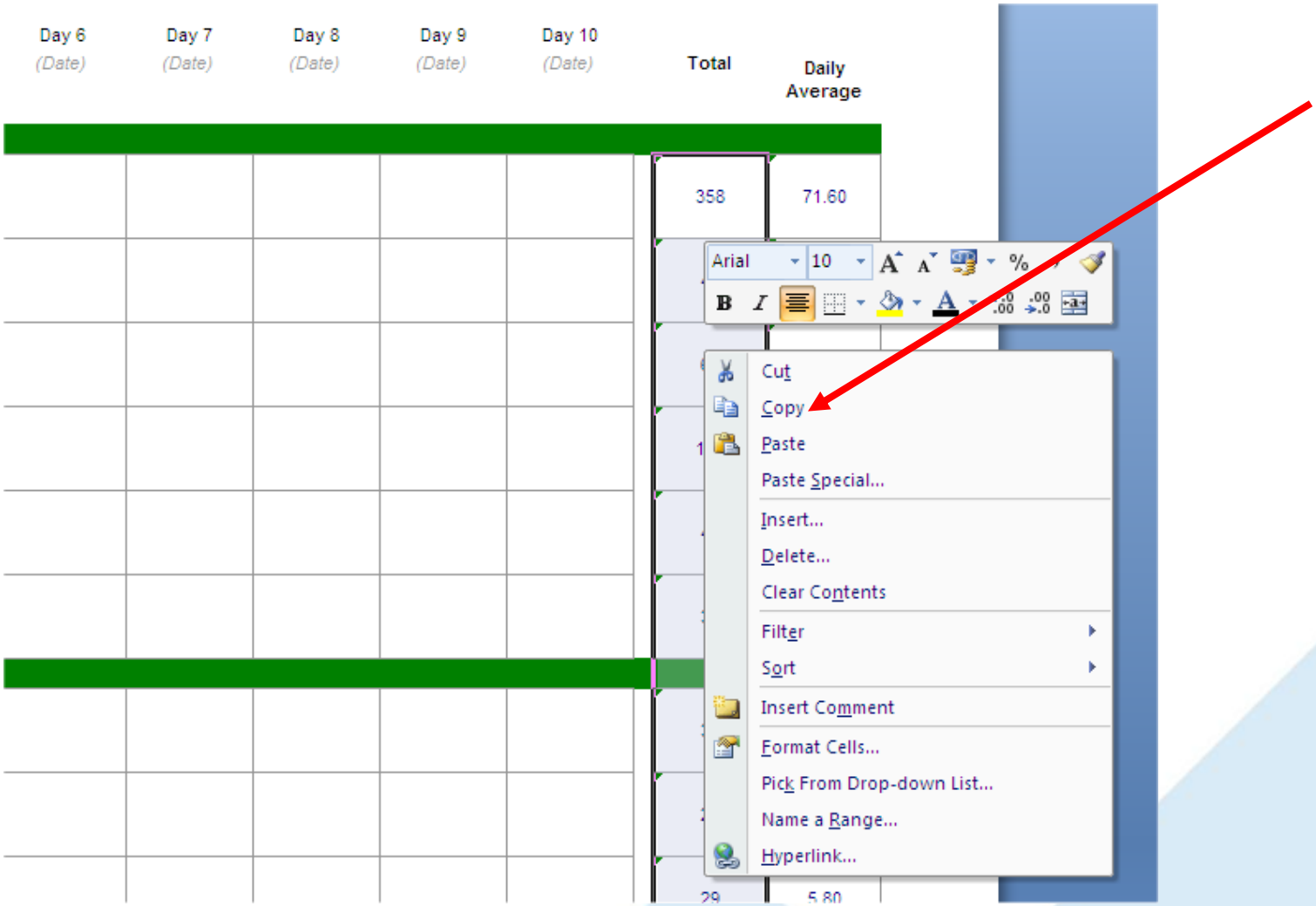
Right click on the one of the selected cells, and select 'Copy'



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Open the spreadsheet ‘Baseline data analysis sheet - Facilitator’ and select the ‘Baseline Data’ tab

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Baseline data analysis sheet - Facilitator.xls [Compatibility Mode] - Microsoft Excel

Home | Insert | Page Layout | Formulas | Data | Review | View

Spelling | Research | Thesaurus | Translate | Proofing

New Comment | Delete | Previous | Next | Show/Hide Comment | Show All Comments | Show Ink | Comments

Protect Sheet | Protect Workbook | Share Workbook | Protect and Share Workbook | Allow Users to Edit Ranges | Track Changes | Changes

R1C3 | Facilitator instructions

Leader team baseline data collection

Facilitator instructions

1) Ask your participants to collect baseline data for a minimum of 1 week (ideally 2 weeks) and to submit their data to you a few days in advance of your Leadership Team Coaching session

2) Once you have received each individual's data:
- Copy the totals from the individual's data collection sheet (cells P8-P24 from the 'Data Collection' sheet)
- Paste the values into the columns below (rows 10-26)
- Enter the individual's name into row 8

3) When you have entered the data for all the PA team, click on the tabs 'PA data charts (emails)', 'PA data charts (meetings)' and 'PA data charts (Additional)' to see the results displayed graphically.

4) If you repeat this exercise later in the programme to demonstrate whether an improvement has been made, don't forget to save your original spreadsheets so that you have a record for comparison

Enter data

Automatically calculated data

Question	Name	Name	Name	Name	Name	Name	Name	Name	Name	Name	Name	Name	Team total	% of Total
Email management														
What is the total number of emails you have received during the week?													0	
How many emails did you receive which you feel you were inappropriately copied into?													0	#DIV/0!
How many emails have you received with attachments?													0	#DIV/0!
What is the total number of emails you have sent during this week?													0	
How many emails did you send that had a clear subject line and clear stated action required with timescales?													0	#DIV/0!
How many emails have you sent with attachments?													0	#DIV/0!
Meetings management														
How many meetings did you attend during the course of the week?													0	

PA data charts (Additional) | Leader Baseline data | Leader data charts (emails) | Leader data charts (meetings)

Ready | 55%

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Select the cell next to the first question in the 'Name' column as shown below

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Leader team baseline data collection

Facilitator instructions

1) Ask you participants to collect baseline data for a minimum of 1 week (ideally 2 weeks) and to submit their data to you a few days in advance of your Leadership Team Coaching session

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Question	Name	Name	Name	Name	Name	Name	Name
Email management							
What is the total number of emails you received each day?							
How many emails did you receive which you feel you were inappropriately copied into?							
How many emails have you received with attachments?							
What is the total number of emails you sent each day?							
How many emails did you send that had a clear subject line, and clear stated action required with timescales?							
How many emails have you sent with attachments?							
Meetings management							
How many meetings did you attend each day?							
How many meetings did you attend that started on							

PA Baseline data | PA data charts (emails) | PA data charts (meetings) | PA data charts (Additional) | Leader Baseline data | Lead

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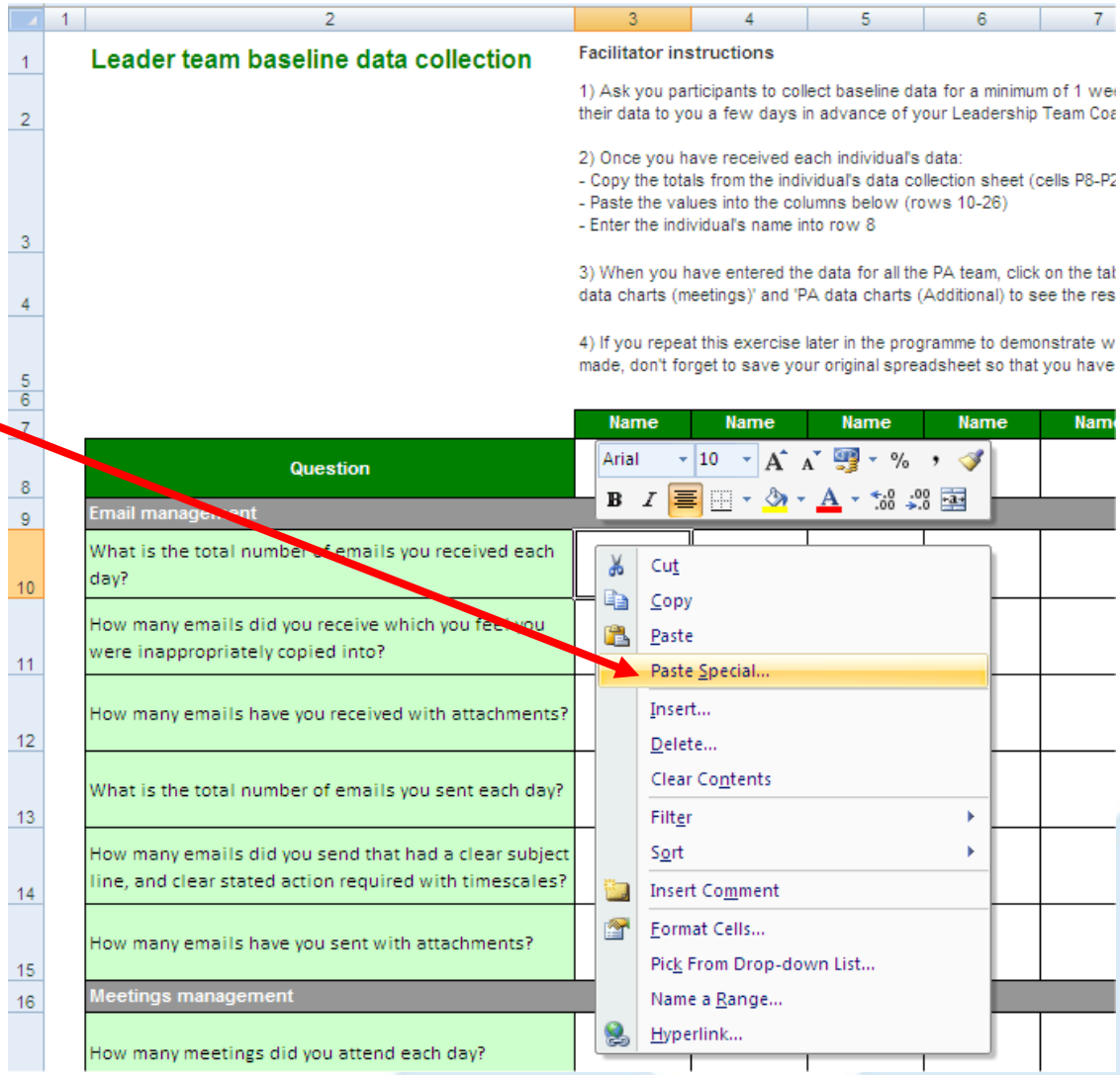
Right click and select ‘Paste Special’



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In the ‘Paste’ section select ‘Values’ then click ‘OK’

Leader team baseline data collection

Facilitator instructions

1) Ask you participants to collect baseline data for a minimum of 1 week (ideally 2 weeks) and tc their data to you a few days in advance of your Leadership Team Coaching session

2) Once you have received each individual's data:
- Copy the totals from the individual's data collection sheet (cells P8-P24 from the 'Data Collection
- Paste the values into the columns below (rows 10-26)
- Enter the individual's name into row 8

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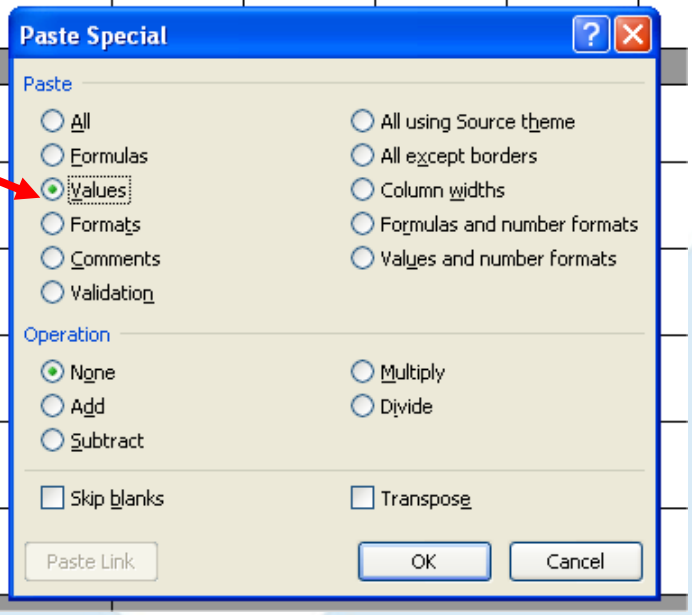
4) If you repeat this exercise later in the programme to demonstrate whether an improvement ha made, don't forget to save your original spreadsheet so that you have a record for comparison

	Name	Name	Name	Name	Name	Name
Question						
Email management						
What is the total number of emails you received each day?						
How many emails did you receive which you feel you were inappropriately copied into?						
How many emails have you received with attachments?						
What is the total number of emails you sent each day?						
How many emails did you send that had a clear subject line, and clear stated action required with timescales?						
How many emails have you sent with attachments?						



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The results from the individuals spreadsheet should now appear in the selected column

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Question	Name	Name	Name	Name	Name	Name	Name	Name	Name
Email management									
What is the total number of emails you received each day?	358								
How many emails did you receive which you feel you were inappropriately copied into?	41								
How many emails have you received with attachments?	68								
What is the total number of emails you sent each day?	163								
How many emails did you send that had a clear subject line, and clear stated action required with timescales?	41								
How many emails have you sent with attachments?	34								
Meetings management									
How many meetings did you attend each day?	32								
How many meetings did you attend that started on time?	21								
How many meetings did you attend that ended on time?	29								
How many minutes, papers or agendas did you receive each day?	14								
How many minutes, papers or agendas did you receive less than 48 hours before the scheduled meeting?	8								
Additional Questions									
Optional Question 1	300								
Optional Question 2	284								
Number of Days Completed	5								

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Put the name into row 8, as shown below

3) When you have entered the data for all the PA team, click on the tabs 'F
data charts (meetings)' and 'PA data charts (Additional) to see the results

4) If you repeat this exercise later in the programme to demonstrate wheth
made, don't forget to save your original spreadsheet so that you have a re

	Name	Name	Name	Name	Name
Question	Joe Bloggs				
Email management					
What is the total number of emails you received each day?	358				
How many emails did you receive which you feel you were inappropriately copied into?	41				
How many emails have you received with attachments?	68				
What is the total number of emails you sent each day?	163				
How many emails did you send that had a clear subject line, and clear stated action required with timescales?	41				
How many emails have you sent with attachments?	34				

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Undertake the same process for the remaining spreadsheets

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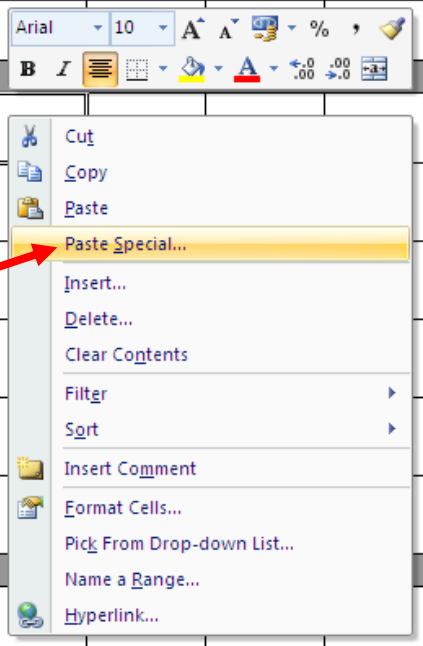
4) If you repeat this exercise later in the programme to demonstrate whether an improvement has b made, don't forget to save your original spreadsheet so that you have a record for comparison

	Name	Name	Name	Name	Name	Name	Nan
Question	Joe Bloggs						
Email management							
What is the total number of emails you received each day?	358						
How many emails did you receive which you feel you were inappropriately copied into?	41						
How many emails have you received with attachments?	68						
What is the total number of emails you sent each day?	163						
How many emails did you send that had a clear subject line, and clear stated action required with timescales?	41						
How many emails have you sent with attachments?	34						
Meetings management							
How many meetings did you attend each day?	32						
How many meetings did you attend that started on time?	21						
How many meetings did you attend that ended on							



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Viewing team profiles

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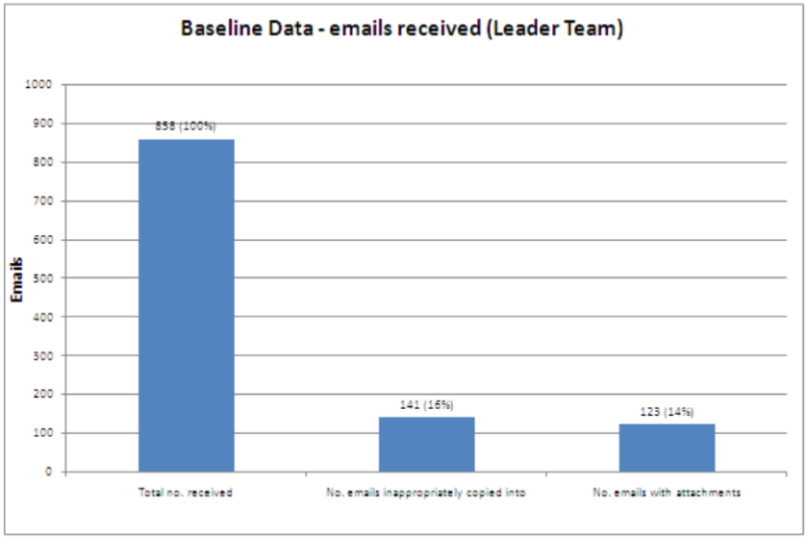
To view the team scores

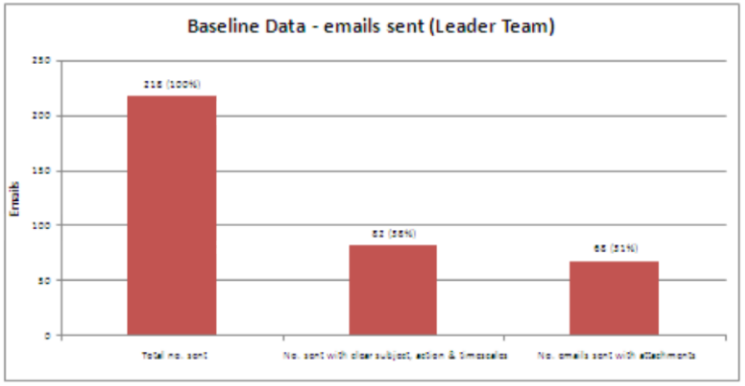
Select the following worksheets:

- data charts (emails)
- data charts (meetings)
- data charts (additional)

Leader baseline data charts - emails

Email management					
Question	Total	Percentage	Daily team average	Weekly team average	Standard Deviation
Total no. received	858		85.80	429.00	100.41
No. emails inappropriately copied into	141	16%	14.10	70.50	41.72
No. emails with attachments	123	14%	12.30	61.50	9.19
Total no. sent	218		21.80	109.00	76.37
No. sent with clear subject, action & timescales	82	38%	8.20	41.00	0.00
No. emails sent with attachments	68	31%	6.80	34.00	0.00





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Once you have created the team profile make sure that you save a copy. This will allow you to use the blank data analysis sheet again

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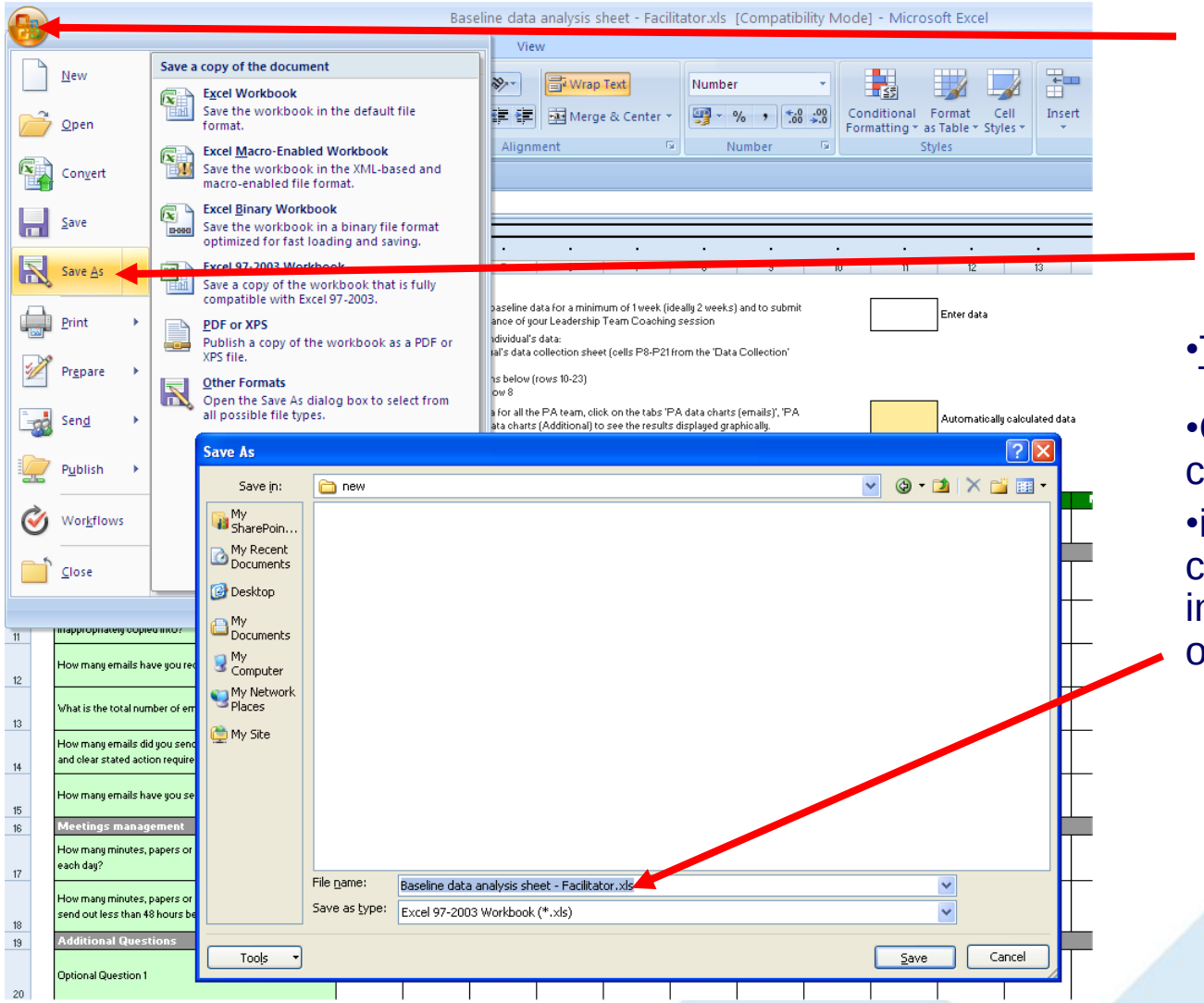

- To save the spreadsheet:
- Go to the **Office Button,** click **Save As,** and
- in the **File Name** section change the file name to include the date and your organisation name.

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