NHS
Institute for Innovation and Improvement

The Productive Leader

Releasing time to lead™

Workload Activity Data

Guide for Project Managers and Facilitators updated March 2012

© NHS Institute for Innovation and Improvement, 2012

Institute for Innovation and Improvement

Managing the questionnaire process

© NHS Institute for Innovation and Improvement, 2012

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.

© NHS Institute for Innovation and Improvement, 2012

Workload activity documents you will need to access

•There are three spreadsheets which you need to complete the process:

• **Workload management – Non-admin* activity log**: this is the version you will be sending for completion to all staff who are not in an admin or support role – including managers, executives and clinicians

• **Workload management – Admin* activity log**: this is the version you will be sending to all staff in an admin or support role

• **Workload management – Facilitator analysis sheet**: this is the document you will use to collate the results and create team profiles of the activity data (both teams)

•All the above were updated in March 2012

In some of the graphics the terms “Leaders” and PAs” may be used

© NHS Institute for Innovation and Improvement, 2012

The Workload Activity Data process

NHS Institute for Innovation and Improvement

1. Project Manager (PM) or Facilitator opens the Workload Activity Data Collection spreadsheets and checks suggested activity categories

2. Inserts their email address, deadline and data collection period into the second page of the documents (entitled 'your details')

3. Emails out the Activity Data spreadsheets to the relevant participants providing the appropriate deadline

4. Participants discuss/ agree activity data categories with facilitator and collect data

5. Participant activity data is sent back via email to the PM/ Facilitator

6. PM/ Facilitator copies and pastes data from the individual logs into the facilitator analysis sheet

7. PM/ Facilitator prints out the team profile for non-admin and admin teams for the Workload Management session

8. Team profile is shared with the programme participants at the Workload Management session

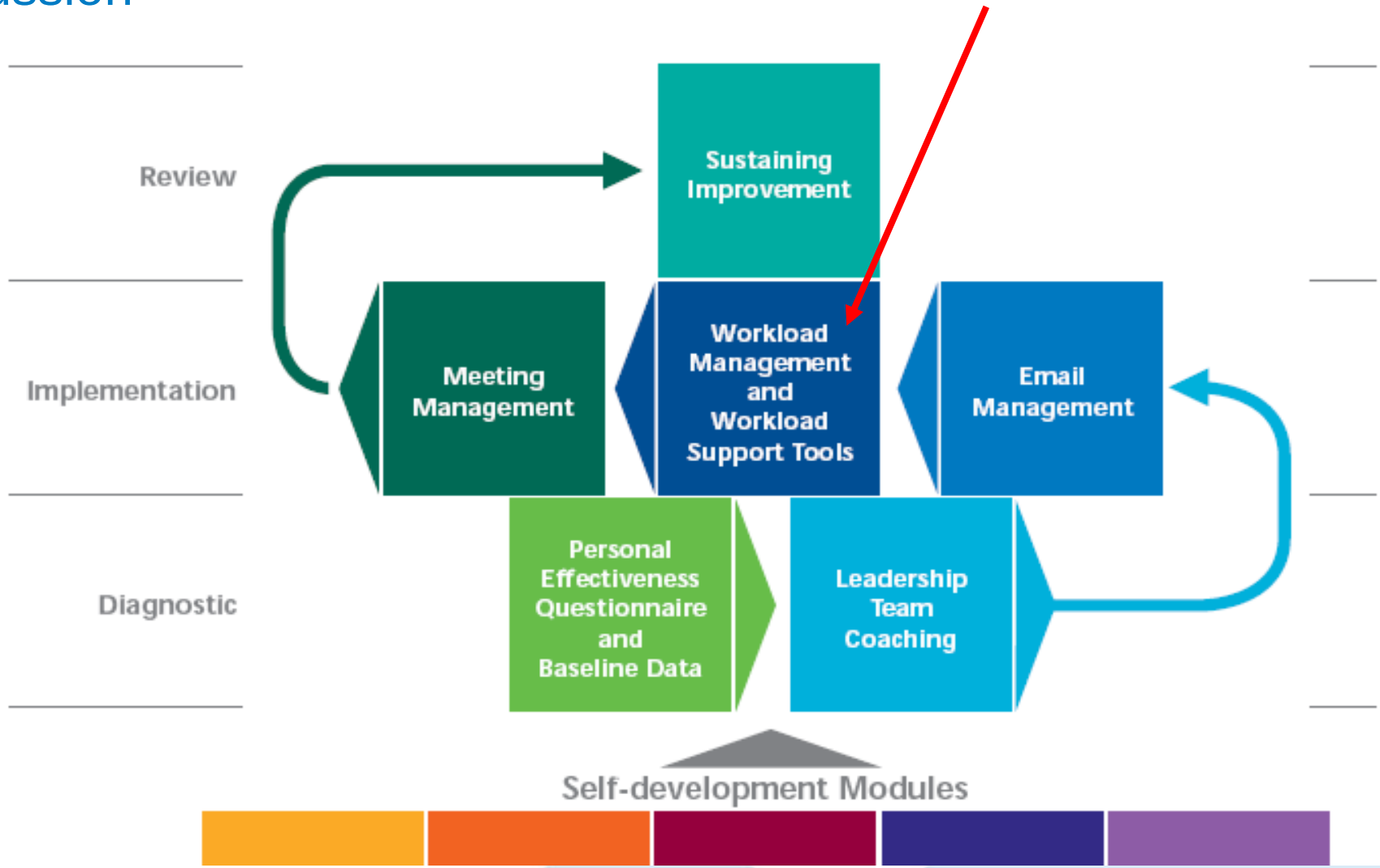
9. Individual activity data profiles are provided at the session for reflection

10. Outside of the session, activity data can be discussed further at 1:1s if appropriate

- Project Manager/Facilitator activities
- Participant activities

© NHS Institute for Innovation and Improvement, 2012

Workload activity data must be collected in advance of the Workload Management session to inform discussion



© NHS Institute for Innovation and Improvement, 2012

How often should the Workload Activity Log be completed?

•Participants only need to complete this exercise the once in the programme.

How will the results be used?

On completing the individual Activity Data Logs, participants will have view of how they spend their working week.

Team profiles will be collated by the Project Manager/Facilitator so that in the facilitated session the team can see how overall they spend their time. It is advisable to print off individual profiles as well though to allow people to reflect on both perspectives.

Teams will be able to consider whether there is a good balance of activities among the team or whether they are spending too much or too little time collectively on certain activities.

© NHS Institute for Innovation and Improvement, 2012

NHS
Institute for Innovation and Improvement

Instructions for inserting your email address and submission deadline into the Workload Activity Logs

© NHS Institute for Innovation and Improvement, 2012

Overview of the instructions

NHS
Institute for Innovation and Improvement

- **Instructions for inserting your email address and submission deadline into the workload management sheet, and specifying additional activities***

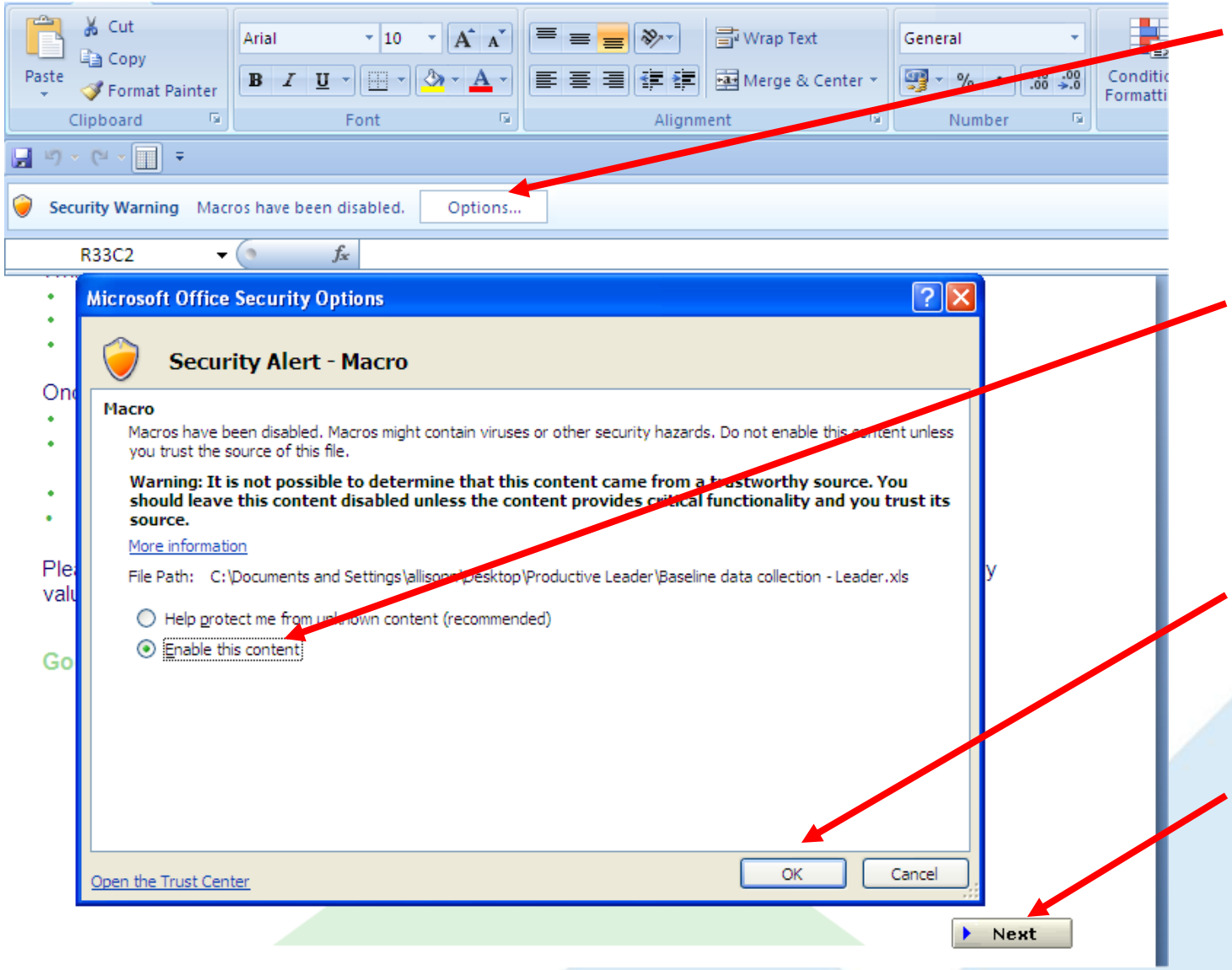
- Open the **Non-admin Activity Log** , enable macro's, and press **'Next'**
- Select '**Review**', then '**Unprotect Sheet**'
- Complete the following details.
  - 'Project manager's email' - enter your email address
  - 'Deadline for submission ' - enter the date that the participant must submit their results by
  - 'Number of days to collect data for' – The total number of days (up to 10, minimum of 5) that the participant must collect data for
- Then go back to '**Review**', select '**Protect Sheet**' and then **'Ok'**
- Press begin, which will open 'Non-admin workload log – day 1' sheet.
- In the row headings for columns J, K, and L – enter any extra activities that you would like the participants to record time against. Enter both the Activity title and description.

See the following pages for step by step visual instructions

** The following instructions should be followed for both the non-admin and admin workload management sheets*

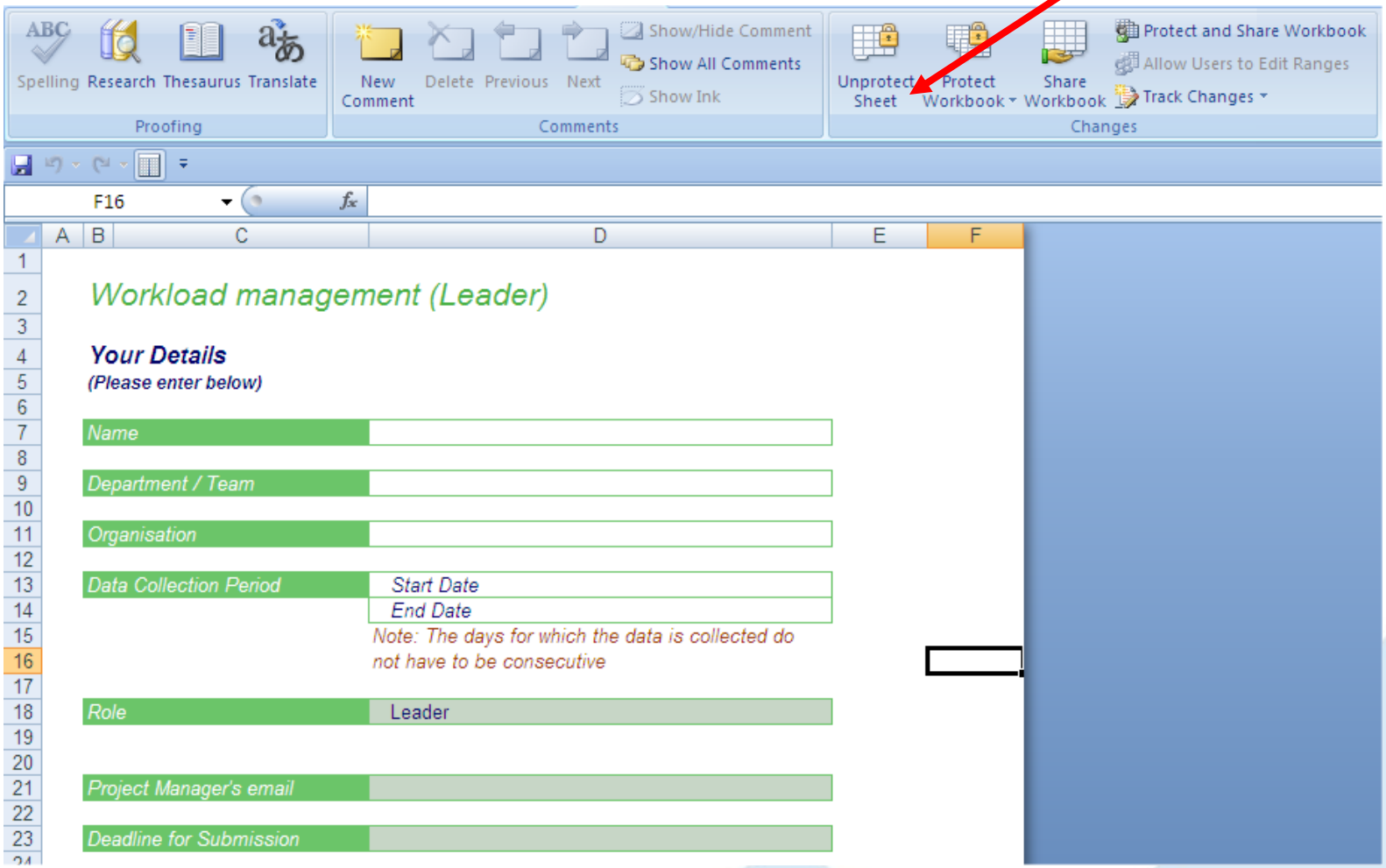
© NHS Institute for Innovation and Improvement, 2012

Open the Non-admin activity log, enable macros and press 'Next'



© NHS Institute for Innovation and Improvement, 2012

Select ‘Review’, then ‘Unprotect Sheet’



© NHS Institute for Innovation and Improvement, 2012

How to set up the “Start” sheet

NHS
Institute for Innovation and Improvement

Workload management (Leader)

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	

Please contact your Project Manager or Facilitator if you are unable to complete this sheet or require assisstance.

Previous Begin

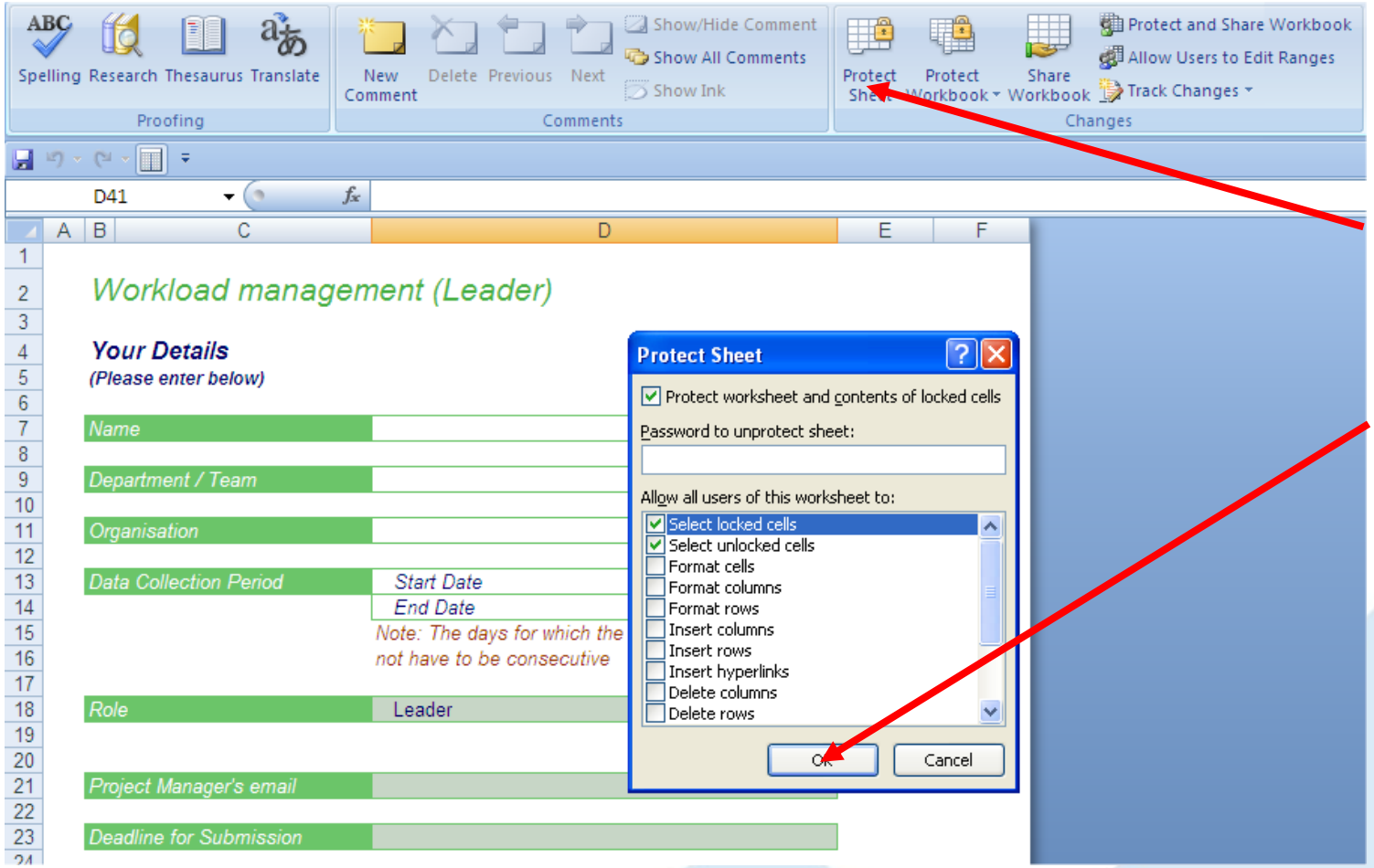
Enter your email address

Enter the date for submitting workload management data

Enter the total number of days to collect data

© NHS Institute for Innovation and Improvement, 2012

Then go to 'Review', select 'Protect Sheet' and then 'OK'. Finally, click begin, which will open 'Non-admin – day 1' sheet



© NHS Institute for Innovation and Improvement, 2012

NHS
Institute for Innovation and Improvement

Instructions for creating the group profiles

© NHS Institute for Innovation and Improvement, 2012

Overview of the instructions

NHS
Institute for Innovation and Improvement

Instructions for creating the team profiles

Open the first **Non-admin Activity Log** that is completed by the leader and returned to you

- Select the sheet titled '**Summary**'
- Click on the cell shown (the first column of the **'Total**' row)
- Select all of the cells from **column C to column Q**
- Right click on the one of the selected cells, and select '**Copy'**
- Open the spreadsheet '**Workload management - Facilitator analysis sheet**' and select the '**Data Sheet - Summary (non-admin)**' tab
- Enter the Organisation for which you are collecting data, the current date, and the date of submission in the empty cells shown below
- Enter the individual's name into **Column B**, starting with **cell B14**
- Enter the number of days for which they collected data into **Column C**, starting with **cell C14.** Note: This can be taken from the '**Summary**' sheet within the individual's Activity Data Log – all days that are not filled in are greyed out.
- Right click on **cell D14**, and select '**Paste Special**'. In the '**Paste**' section select '**Values**' then click '**OK**'
- The results from the individual's spreadsheet should now appear in the selected row
- Undertake the same process for the remaining leaders' spreadsheets*

See the following pages for step by step visual instructions

**This process should be undertaken for the admin group once the non-admin spreadsheets have been completed*

© NHS Institute for Innovation and Improvement, 2012

In the completed Workload Activity Logs, select the 'Summary' sheet tab

NHS Institute for Innovation and Improvement

Gathering this data is critical to inform the work you do as a team in the Workload Management session.

We advise both the leader and PA to spend a minimum of 2 weeks collecting this data. Your facilitator will confirm the period of data collection and the deadline for submission.

Before you get started

- Your leader activity log gives a day segmented into 15 minute slots.
- Times in the activity log have been extended beyond the typical nine to five working day to take account of the fact that at times travel and other work commitments can take place outside of office hours).
- You should review the suggested activity headings before beginning to complete the log. There are three blank columns in which you can add activities which are relevant to your role.
- If you need to change the existing activity headings please inform your facilitator as soon as possible as this might affect the data analysis.

Completing the activity log

- Please ensure you date each worksheet as the facilitator will be receiving a number by email.
- You can print out each worksheet if you wish to manually complete it at your desk or take it to meetings during the course of the day.
- To complete the log, simply tick or fill each relevant cell. At the end of the data collection period simply input electronically the total number of minutes spent in the document.
- Otherwise the form can be completed electronically immediately if preferred.

Submitting your workload activity data

- Once you have completed the forms with daily totals of minutes spent on each activity, please email your forms to your Productive Leader facilitator for collation.
- Please submit your data by email within the deadline specified by your facilitator to give them enough time to analyse the results to inform your Workload Management session.

Leader workload log - day 7 | Leader workload log - day 8 | Leader workload log - day 9 | Leader workload log - day 10 | Summary

© NHS Institute for Innovation and Improvement, 2012

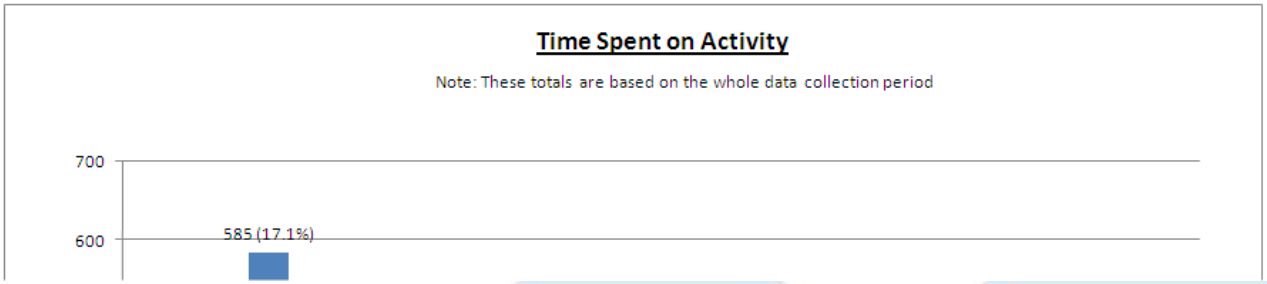
Click on the cell shown (the first column of the 'Total' row)

C16 =SUM(C6:C15)

Results

Previous Send

Day	Emails	Meetings	Calls	Publications	Planning	Projects	Catch ups	Travel	Other 1	Other 2	Other 3	Total Mins Worked	Working day (in minutes)	Additional Mins	Capacity worked
Day 1	30	150	30	90	45	15	90	0	0	0	0	450	480	-30	93.8%
Day 2	105	135	30	15	60	45	30	30	15	15	0	480	480	0	100.0%
Day 3	105	60	30	30	30	15	75	75	45	0	0	465	480	-15	96.9%
Day 4	45	60	195	135	0	0	0	45	15	30	0	525	480	45	109.4%
Day 5	30	75	15	0	0	0	105	135	45	105	0	510	480	30	106.3%
Day 6	90	90	90	45	15	15	15	15	60	45	0	480	480	0	100.0%
Day 7	75	15	45	45	45	45	45	45	45	45	60	510	480	30	106.3%
Day 8															
Day 9															
Day 10															
Total	480	585	435	360	195	135	360	345	225	240	60	3420	3360	60	101.8%



© NHS Institute for Innovation and Improvement, 2012

Select all of the cells from column C to column Q, as shown below

NHS Institute for Innovation and Improvement

Results

Previous

Send

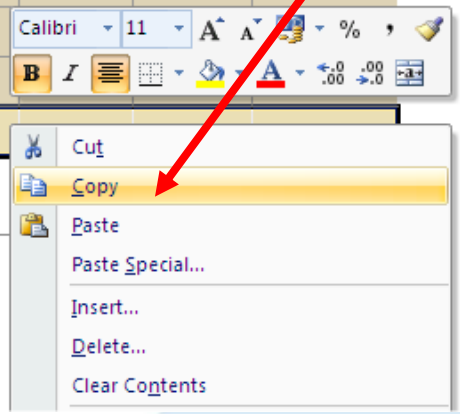
Day	Emails	Meetings	Calls	Publications	Planning	Projects	Catch ups	Travel	Other 1	Other 2	Other 3	Total Mins Worked	Working day (in minutes)	Additional Mins	Capacity worked
Day 1	30	150	30	90	45	15	90	0	0	0	0	450	480	-30	93.8%
Day 2	105	135	30	15	60	45	30	30	15	15	0	480	480	0	100.0%
Day 3	105	60	30	30	30	15	75	75	45	0	0	465	480	-15	96.9%
Day 4	45	60	195	135	0	0	0	45	15	30	0	525	480	45	109.4%
Day 5	30	75	15	0	0	0	105	135	45	105	0	510	480	30	106.3%
Day 6	90	90	90	45	15	15	15	15	60	45	0	480	480	0	100.0%
Day 7	75	15	45	45	45	45	45	45	45	45	60	510	480	30	106.3%
Day 8															
Day 9															
Day 10															
Total	480	585	435	360	195	135	360	345	225	240	60	3420	3360	60	101.8%

© NHS Institute for Innovation and Improvement, 2012

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

Institute for Innovation and Improvement

Emails	Meetings	Calls	Publications	Planning	Projects	Catch ups	Travel	Other 1	Other 2	Other 3	Total Mins Worked	Working day (in minutes)	Additional Mins	Capacity worked
30	150	30	90	45	15	90	0	0	0	0	450	480	-30	93.8%
105	135	30	15	60	45	30	30	15	15	0	480	480	0	100.0%
105	60	30	30	30	15	75	75	45	0	0	465	480	-15	96.9%
45	60	195	135	0	0	0	45	15	30	0	525	480	45	109.4%
30	75	15	0	0	0	105	135	45	105	0	510	480	30	106.3%
90	90	90	45	15	15	15	15	60	45	0	480	480	0	100.0%
75	15	45	45	45	45	45	45	45	45	60	510	480	30	106.3%
480	585	435	360	195	135	360	345	225	240	60	3420			



Time Spent on Activity

Note: These totals are based on the whole data collection period

© NHS Institute for Innovation and Improvement, 2012

Open the spreadsheet 'Workload management - Facilitator analysis sheet' and select the 'Data Sheet - Summary (non-admin)' tab

NHS Institute for Innovation and Improvement

PRODUCTIVE LEADER DATA SUMMARY (EXEC)

Leader summary sheet

Organisation

Date:

Date of submission:

Facilitator instructions

(1) Ask your participants to fill in their workload management data for a minimum of 1 week (ideally 2 weeks) and to submit their data to you.
(2) Enter the Organisation for which you are collecting data, the current date, and the date of submission in the empty cells to the left
(3) Once you have received the individual's data:
- Enter their name into Column B, starting with cell B14.
- Enter the number of days for which they collected data into Column C, starting with cell C14. Note: This can be taken from the 'Summary' sheet within the individual's workload management data collection sheet – all days that are not filled in are greyed out.
- From the individual's workload management data collection sheet ('Summary' sheet), highlight and copy cells B16 to Q16. These contain the totals of each activity as well as calculated information such as capacity worked.
- Paste the values into the cells below, columns D to R, starting with D14 to R14.

(4) When you have entered data for all the Leader team:
- Various summary information, such as totals and averages can be seen in rows 28 to 33

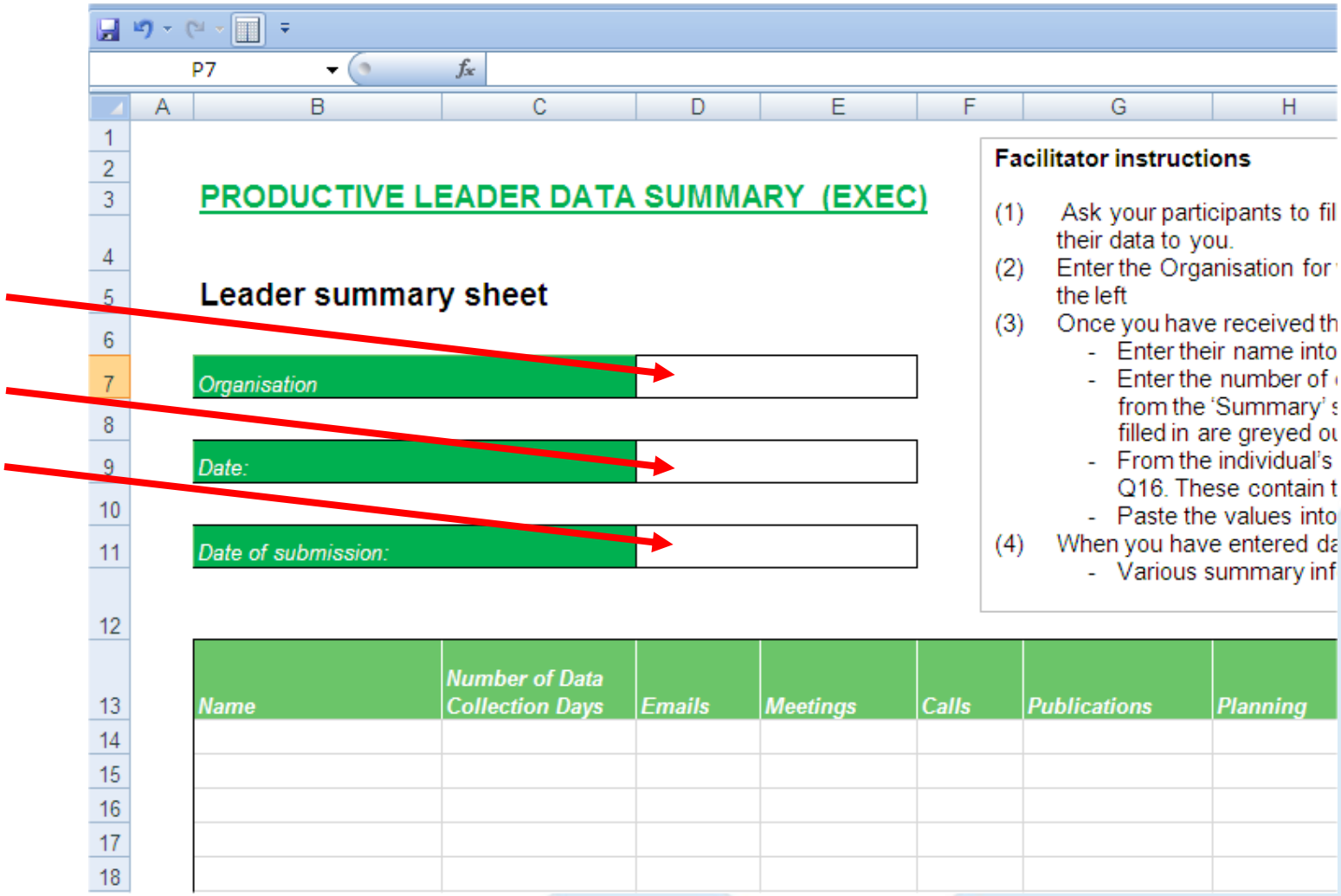
Name	Number of Data Collection	Emails	Meetings	Calls	Publications	Planning	Projects	Catch ups	Travel	Other 1	Other 2	Other 3	Total Mins Worked	Tot Day
Total	0	0	0	0	0	0	0	0	0	0	0	0		
Averaged over team (per day)		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
Percentage of team's day		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!		
													Total	0

Instructions | Data Sheet - Summary (Leader) | Data Sheet - Summary (PA) | Graphs (

© NHS Institute for Innovation and Improvement, 2012

Enter the Organisation for which you are collecting data, the current date, and the date of submission in the empty cells shown below

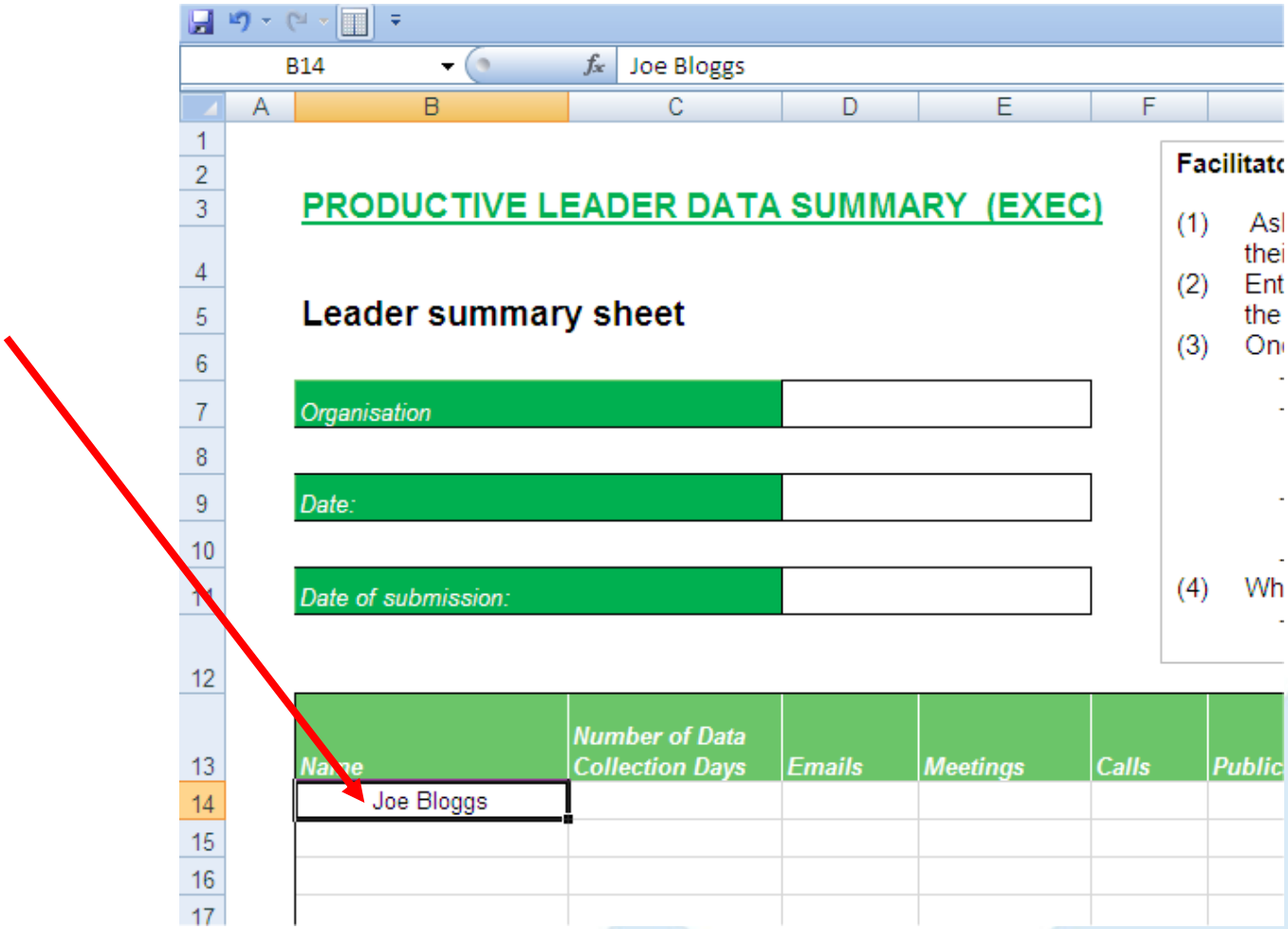
NHS Institute for Innovation and Improvement



© NHS Institute for Innovation and Improvement, 2012

Enter the individual's name into Column B, starting with cell B14

NHS
Institute for Innovation and Improvement



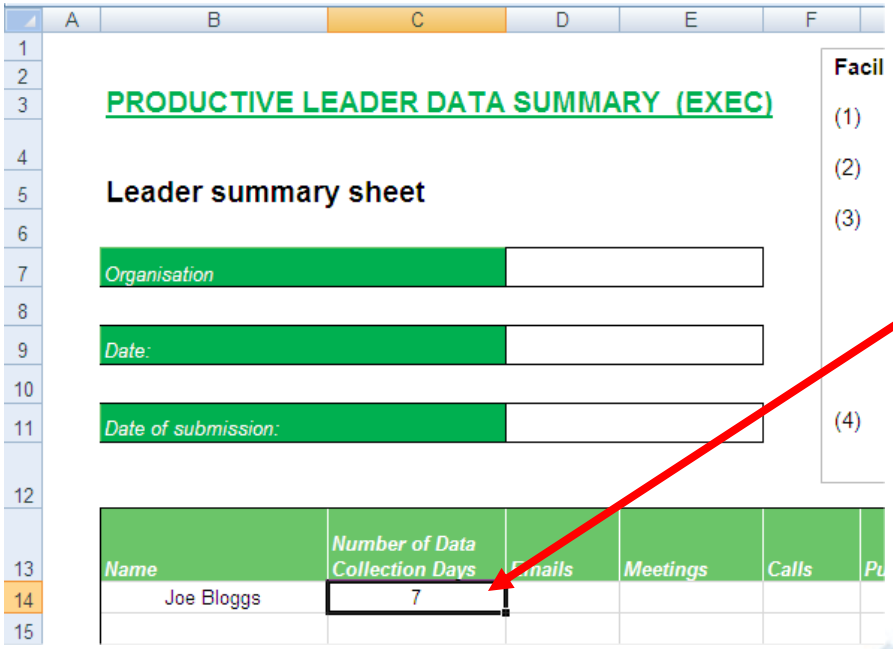
© NHS Institute for Innovation and Improvement, 2012

Enter the number of days for which they collected data into Column C, starting with cell C14.

Institute for Innovation and Improvement

Note: This can be taken from the 'Summary' sheet within the individual's

Workload Activity Log – all days that are not filled in are greyed out.



PRODUCTIVE LEADER DATA SUMMARY (EXEC)

Leader summary sheet

Organisation

Date:

Date of submission:

Facil

(1)

(2)

(3)

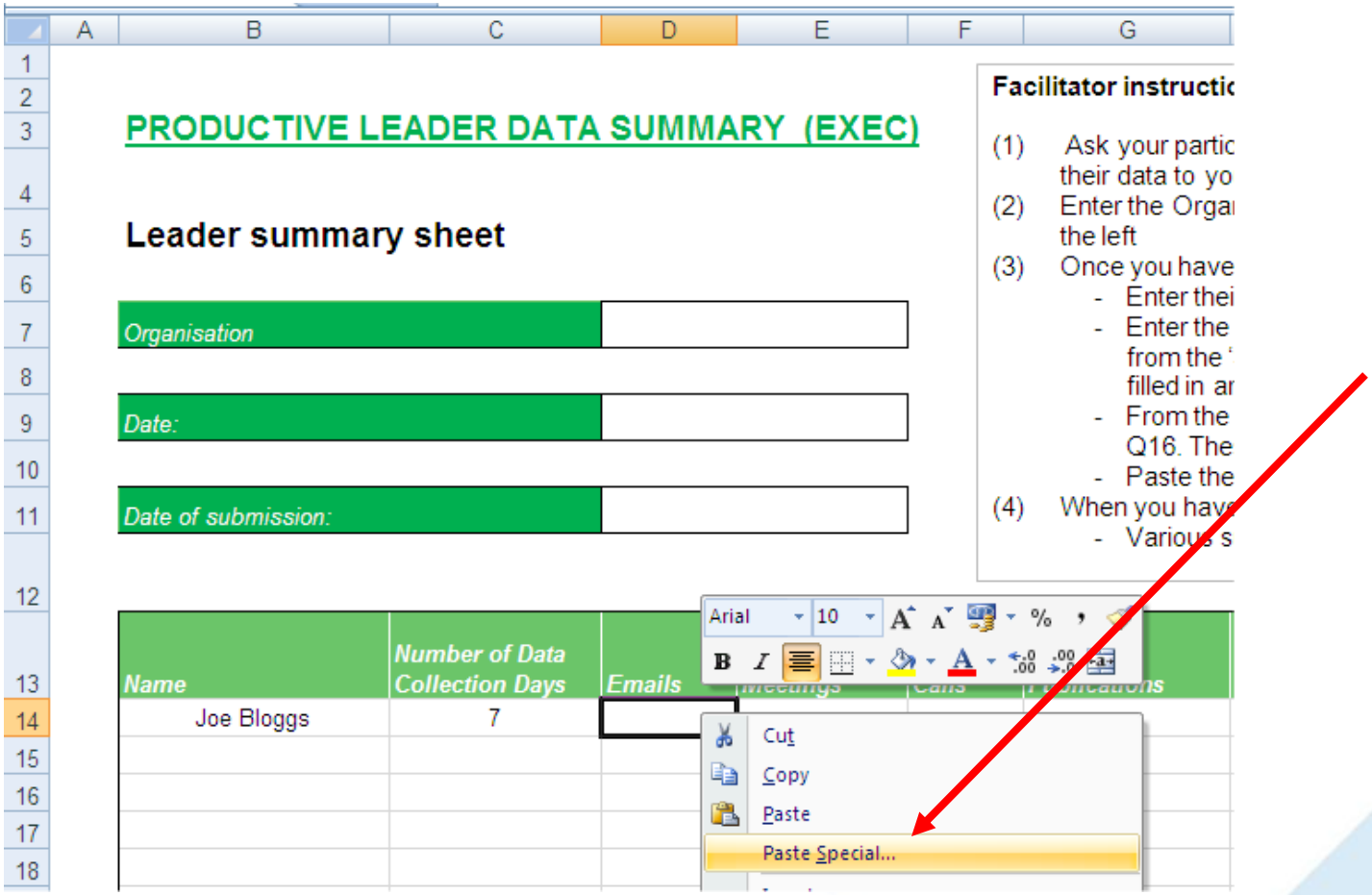
(4)

Name	Number of Data Collection Days	Emails	Meetings	Calls	Pu
Joe Bloggs	7				

Day	Emails	Meetings	Calls	Publications
Day 1	30	150	30	90
Day 2	105	135	30	15
Day 3	105	60	30	30
Day 4	45	60	195	135
Day 5	30	75	15	0
Day 6	90	90	90	45
Day 7	75	15	45	45
Day 8				
Day 9				
Day 10				
Total	480	585	435	360

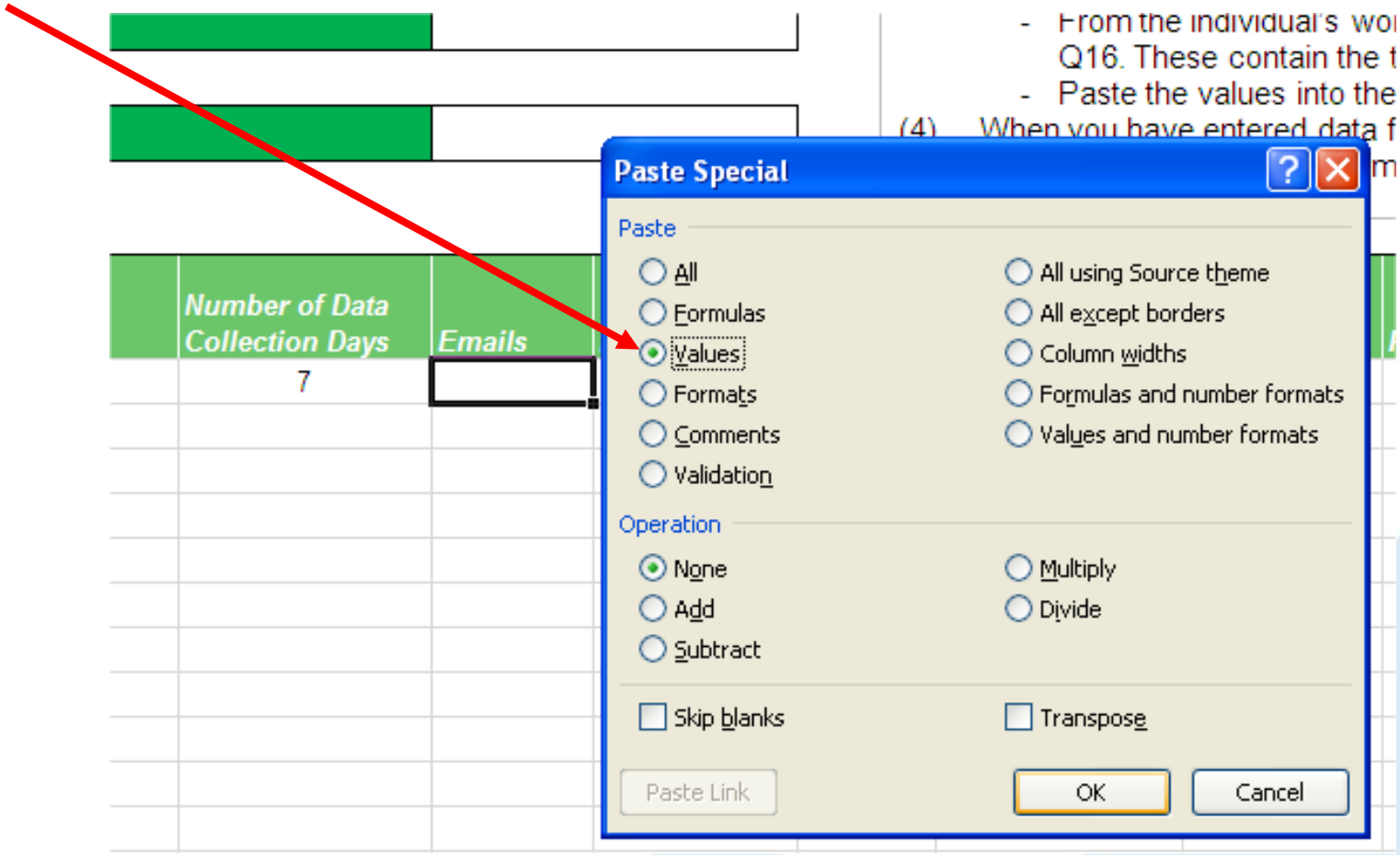
© NHS Institute for Innovation and Improvement, 2012

Right click on cell D14, and select 'Paste Special'



© NHS Institute for Innovation and Improvement, 2012

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



© NHS Institute for Innovation and Improvement, 2012

The results from the individual's Activity Data Log should now appear in the selected row

NHS Institute for Innovation and Improvement

B C D E F G H I J K L M N O P Q R

PRODUCTIVE LEADER DATA SUMMARY (EXEC)

Leader summary sheet

Organisation	
Date:	
Date of submission:	

Facilitator instructions

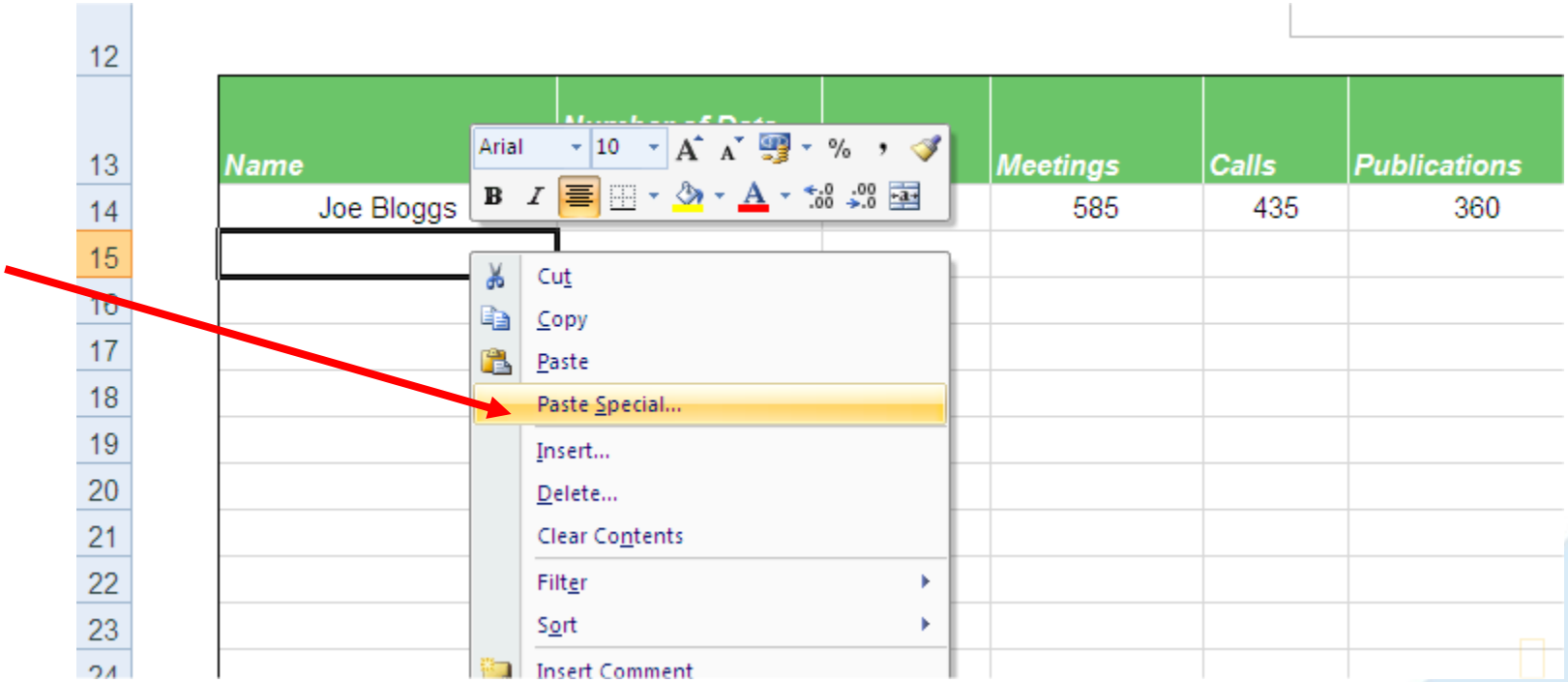
(1) Ask your participants to fill in their workload management data for a minimum of 1 week (ideally 2 weeks) and to submit their data to you.
(2) Enter the Organisation for which you are collecting data, the current date, and the date of submission in the empty cells to the left
(3) Once you have received the individual's data:
- Enter their name into Column B, starting with cell B14.
- Enter the number of days for which they collected data into Column C, starting with cell C14. Note: This can be taken from the 'Summary' sheet within the individual's workload management data collection sheet – all days that are not filled in are greyed out.
- From the individual's workload management data collection sheet ('Summary' sheet), highlight and copy cells B16 to Q16. These contain the totals of each activity as well as calculated information such as capacity worked.
- Paste the values into the cells below, columns D to R, starting with D14 to R14.

(4) When you have entered data for all the Leader team:
- Various summary information, such as totals and averages can be seen in rows 28 to 33

Name	*Number of Data Collection Days*	*Emails*	*Meetings*	*Calls*	*Publications*	*Planning*	*Projects*	*Catch ups*	*Travel*	*Other 1*	*Other 2*	*Other 3*	*Total Mins Worked*	*Total Contracted Days (Minutes)*	*Additional Mins*	*Capacity worked*
Joe Bloggs	7	480	585	435	360	195	135	360	345	225	240	60	3420	3360	60	101.8%

© NHS Institute for Innovation and Improvement, 2012

Undertake the same process for the remaining spreadsheets*



This process should be undertaken for the admin once the non-admin spreadsheets have been completed

© NHS Institute for Innovation and Improvement, 2012

NHS
Institute for Innovation and Improvement

Viewing the group profiles

© NHS Institute for Innovation and Improvement, 2012

Various summary information, such as totals and averages can be seen in rows 28 to 33

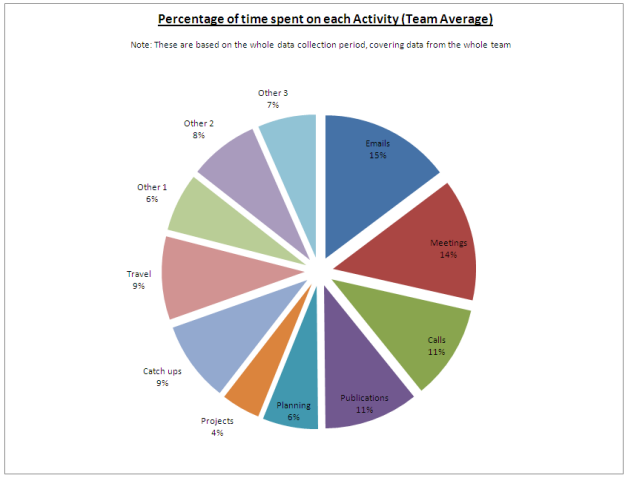
NHS Institute for Innovation and Improvement

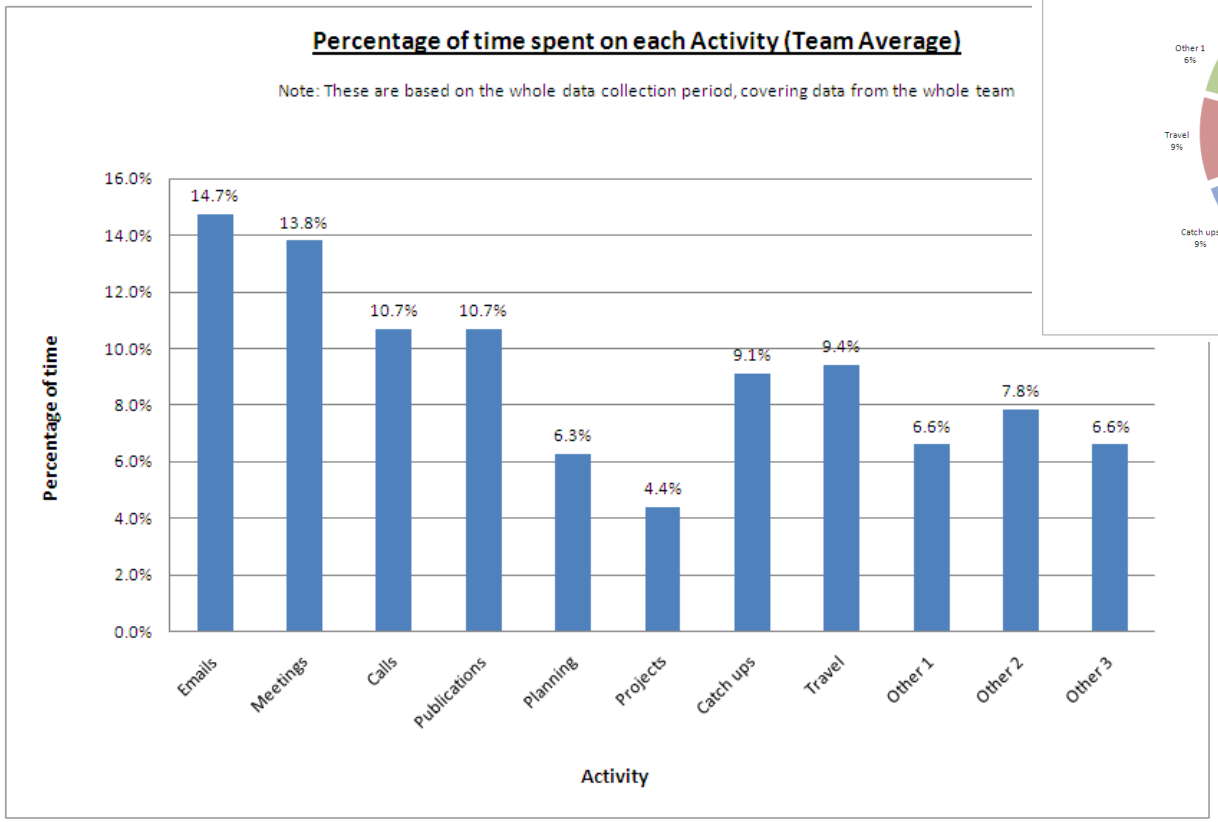
	Name	Number of Data Collection Days	Emails	Meetings	Calls	Publicati	Other 3	Total Mins Worked	Total Contracted Days (Minutes)	Additional Mins	Capacity worked
14	Joe Bloggs	7	480	585	435	360	60	3420	3360	60	101.8%
15	Jim Smith	5	225	75	75	150	255	1365	1500	-135	91.0%
28	Total	12	705	660	510	510	315				
29	Averaged over team (per day)		58.75	55	42.5	42.5	26.25				
30	Percentage of team's day		14.7%	13.8%	10.7%	10.7%	6.6%				
32	Total							4785	4860	-75	
33	Average (Mean)							2392.5	2430	-37.5	96.4%

© NHS Institute for Innovation and Improvement, 2012

The results can be displayed graphically, by clicking on the tab 'Graphs (non-admin)'.

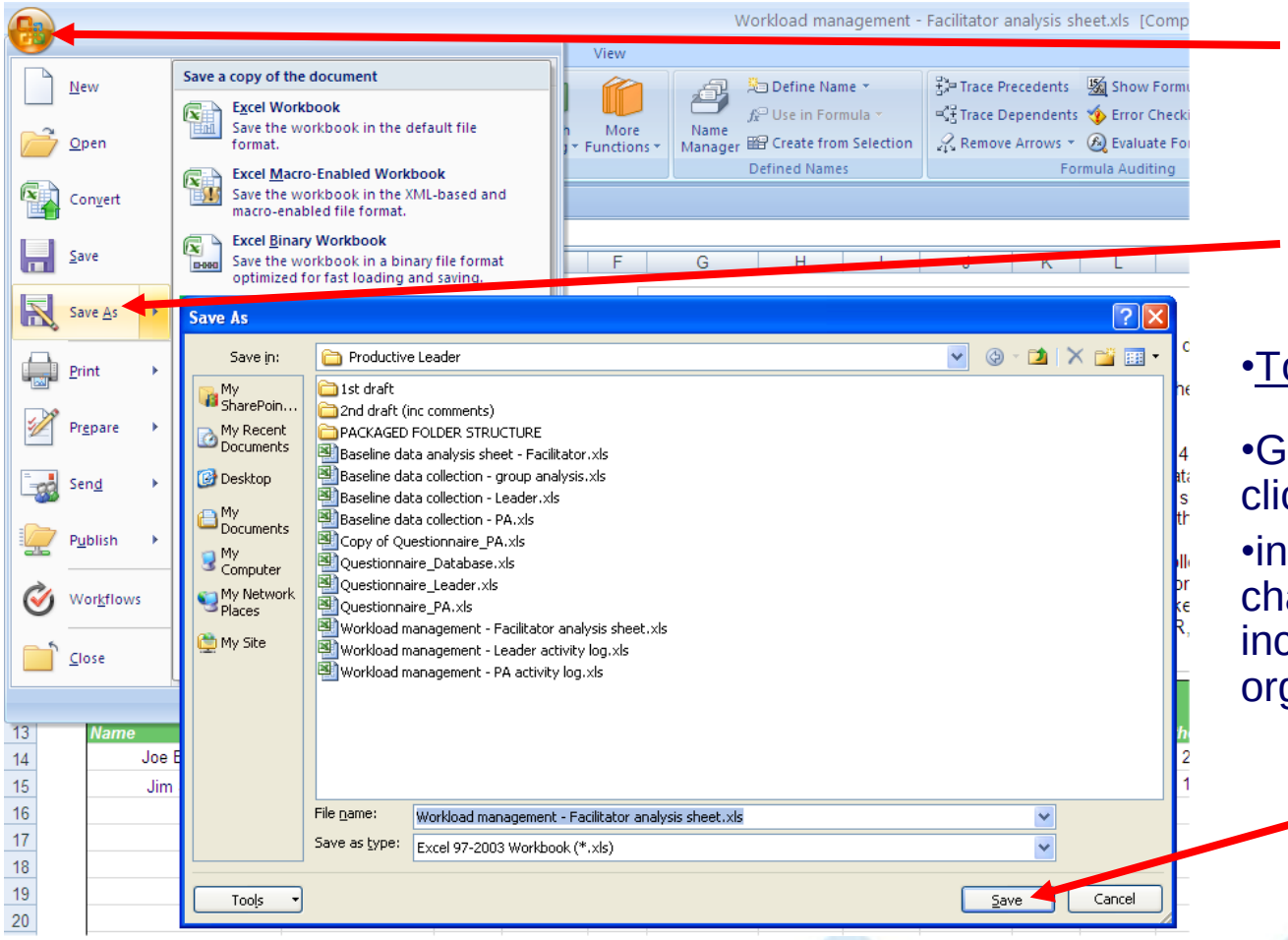
Data Analysis (Leader)





© NHS Institute for Innovation and Improvement, 2012

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



- 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.

© NHS Institute for Innovation and Improvement, 2012