Revealing the Real Workload
## Quantitative Management Using Work Codes

San Antonio, TX
Date TBD

Every one of us, at some point, has needed hard facts about their workload or what they do

▶ Our managers or customers have asked us:

– *Can you take on this additional work?*

– *How much time do you spend doing that?*

– *Can you justify the new hire you're requesting?*

– *What sorts of skill sets are needed in your team?*

– *We see you're busy, but what do you actually <u>do</u>, again?*

▶ We have come to the end of busy days and asked ourselves:

– *What did I just spend the past 10 hours doing?*

▶ This presentation is for anyone who did not have a ready answer.

Internal support staff provide key services and value, but their activities are not easily quantified—which results in a lack of understanding of specific activities or contributions

▸ Internal support includes staff providing the multiple services that support the infrastructure (facilities), keep others organized (EAs), or assist with their tasks (PST)

▸ Uniquely, if your job is well done, *nothing happens*—so your support is often invisible unless a mistake happens

▸ You are chronically busy, but even you aren't sure about the breakout of tasks across those busy hours

▸ Your contributions are not easily quantifiable, but our managers and customers speak in numbers
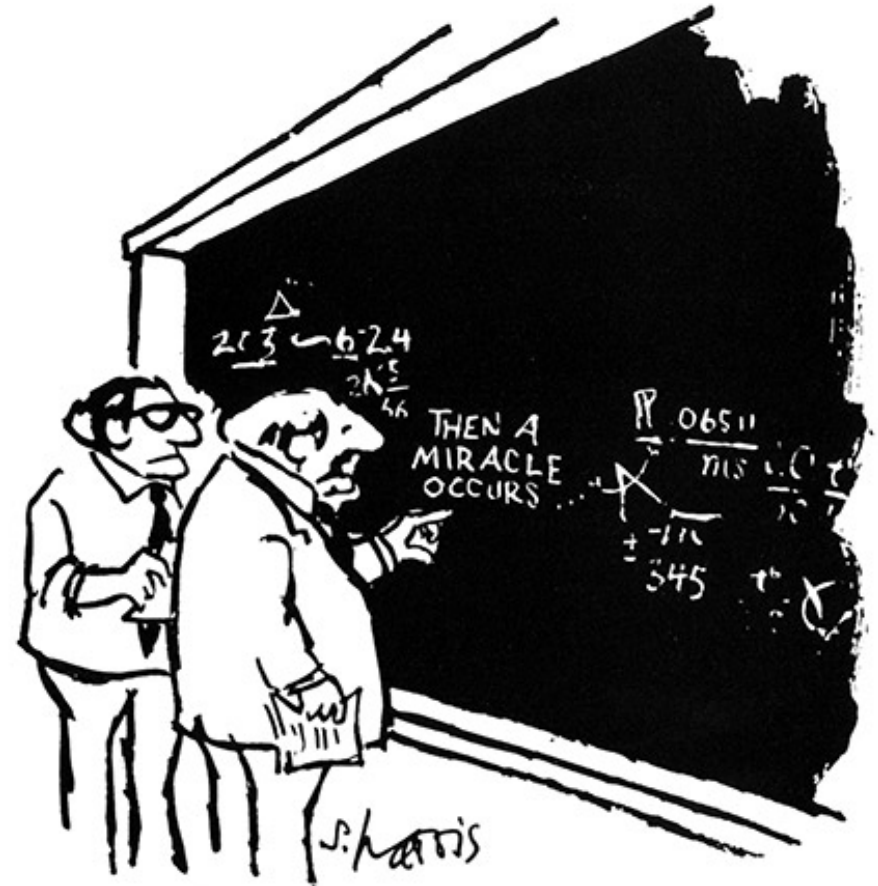
"I think you should be more explicit here in step two."

By translating our activites and value into our the business world's native language of numbers, we can raise awareness of our specific contributions

▸ Quantifying the workload can help you:

- – Perceive patterns of time versus tasks—proportion of effort spent on different tasks over time, as well as total cumulative effort

- – Help you plan your and your team's strategic growth and development

- – Estimate availability

- – Estimate standard levels of effort required on particular types of work

- – Document your capabilities, as an individual or as a team

- – Identify tasks that can be offloaded

- – Document the need for new staff

▸ The suggested method is adaptable, but probably the most use to those with

- – Fast-turnaround tasks

- – Highly fluctuating demand

- – Multiple tasks or services

- – "Implicit" or invisible roles that are strategic or significant

- – Teams with perceived inequity in task distribution

This method was developed by your colleagues—former members of the Project Support Team, who provide internal QA and communication support

▸ We grew from a quality assurance editorial role, into a multifunctional team of 3-5 providing
  – Proposal/Marketing Support
  – Editorial Deliverable Review (QA)
  – Some Contract Process Management (monthly reporting)
  – Information Design ("project work")
  – Office Communications
  – Knowledge Management, Intellectual Capital
  – Training

▸ Demand in these functions was variable and could surge unpredictably; we were so constantly busy reacting to the workload that we couldn't step back and manage it

▸ Frustration was high—and not so much because we were corks in the rapids, but because we didn't know why it was worth it. We couldn't perceive the total contribution of the team or understand how our workload was furthering our team and the firm's goals

▸ We needed the ability to capture and measure our real workload—so we worked out a method to get us some <u>numbers</u>

It's really simple.

1. **Make a task list**

2. Decide the questions you need the data to answer, and based on that, **group your tasks into work categories**

3. **Assign "codes" to each category (optional)**

4. **Decide your sample size** —again, based on the questions you need the data to answer

5. **Build your tools**
   a) To log your time as you work
   b) To record and total hours in your categories

6. **Decide your tracking strategy and** <u>**commit to keeping it**</u> **This is the only hard part**

7. **Total each category's time and record it in your spreadsheet**

8. **Use your data!** Analyze your dataset as needed

1. Make a task list

- Okay, this can be challenging—it's not as easy as it sounds

- It's hard to capture the "intuitive" things—your "understood" or invisible functions

- Inputs:
    - Formal written job description
    - Position requisition or job posting
    - Any verbally assigned tasks
    - Tasks you have assumed responsibility for
    - (if applicable) Tasks you would like to develop capability or assume responsibility for
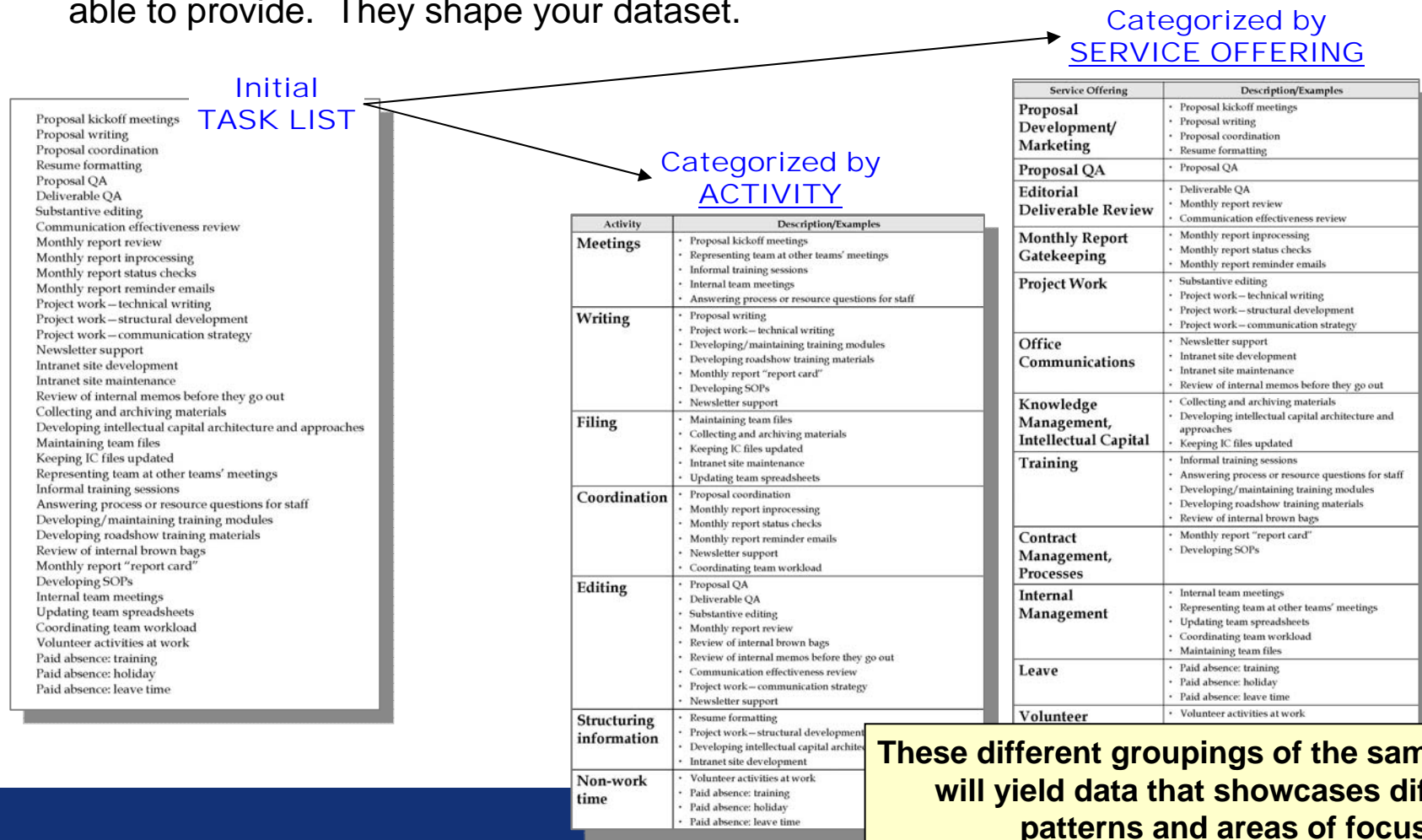
Intuitive tasks are what makes this step challenging.

For example—if you regularly do your family's shopping, how easy would it be to write a complete list for someone unfamiliar with the task? How many items do you just know to pick up, that you wouldn't think about if you were sitting down to make a shopping list?

Give yourself time to make your task list. Do it over a period of days and get input from colleagues, to help you identify the "extras" that are so much a part of your job that you can't see them.
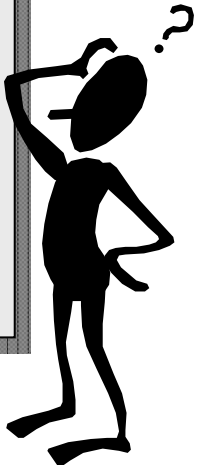
2. Decide the questions you need the data to answer, and based on that, group your tasks into work categories

▸ The categories you select directly affect the story you want to tell and the answers you will be able to provide. They shape your dataset.

Initial TASK LIST

Categorized by ACTIVITY

Categorized by SERVICE OFFERING

These different groupings of the same task list will yield data that showcases different patterns and areas of focus

3. Assign "codes" to each category (optional)

▸ Once you decide on your categories, assign a code

▸ It makes it easier to jot down as you're actually going through your time records

Code	Service Offering
PD	Proposal Development/ Marketing
PQ	Proposal QA
QA	Editorial Deliverable Review
GK	Monthly Report Gatekeeping
XX	Project Work
OC	Office Communications
KM	Knowledge Management, Intellectual Capital
TT	Training
CM	Contract Management, Processes
IM	Internal Management
LV	Leave
V	Volunteer

4. Decide your sample size —again, based on the questions you need the data to answer

▸ This is a very, very subjective thing

▸ Depending on the questions you need to answer, your needs may be satisfied by a week's worth of data, a month's, intermittent samplings, or ongoing

▸ For instance, if you need to demonstrate the frequency of surges or the significance of a repetitive task, your sample size must capture a certain number of surges or repetitions

5. Build your tools—(a) to log your time as you work

- ▸ I advise hard copy—whether daily or weekly

- ▸ Hard copy may sound primitive, but it allows continual access to your log no matter what you're doing with your computer, or where you are at the moment

- ▸ However, other members of my team did quite well with electronic tracking—whatever works for you, as long as it is <u>easily accessible and readily updated</u>

5. Build your tools—(b) to record and total hours in your categories

▸ A basic Excel spreadsheet, with time increments totaling across and categories totaling down

	Proposal Development/ Marketing	Quals Support	Proposal QA	Editorial Deliverable Review	PSR Inprocessing/ Gatekeeping	Project Work	Office Communi- cations	Knowledge Management/ Intellectual Capital	Toolbox and Training	Contract Management/ Processes	Internal Management	Leave	Volunteer Work	
	PD	PK	PQ	QA	GK	XX	OC	KM	TT	CM	IM	LV	V	Total
1/1-1/15														0
1/16-1/31														0
2/1-2/15														0
2/16-2/28														0
3/1-3/15														0
3/16-3/31														0
4/1-4/15														0
4/16-4/30														0
5/1-5/15														0
5/15-5/31														0
6/1-6/15														0
6/16-6/30														0
7/1-7/15														0
7/16-7/31														0
8/1-8/15														0
8/16-8/30														0
	0	0	0	0	0	0	0	0	0	0	0	0	0	

▸ For teams, make a file where everyone can access it, and each team member can update their own information. You can record everyone's data on one sheet, or use tabs, as shown below

| 51 |
| 52 |

◄◄ ◄ ► ►◄ \ Amanda / Genevieve / Julie / Elena / Reach-Back / Not Done / TOTALS \ **Chart Sheet** / Sheet1 /

Ready
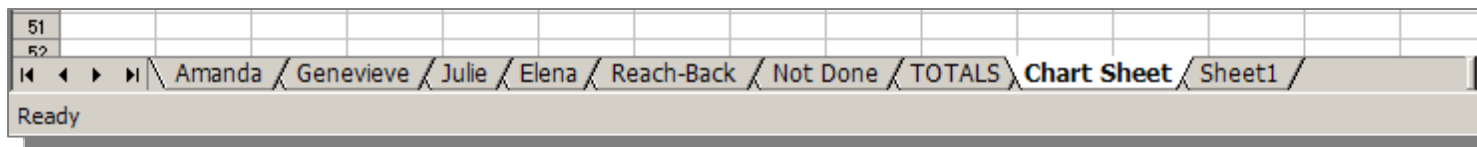
▸ I was documenting a need for new staff, so I recorded our overflow and work we had to turn away, as well as team members' data

6. Decide your tracking strategy and commit to keeping it

▸ This is the hard part—but there are ways to fit this into a busy day

▸ Set a regular time to do this, and protect it

▸ Keep it up even if you have a lapse

▸ If you can't code your time each day, take really good notes so that you can do longer-session coding
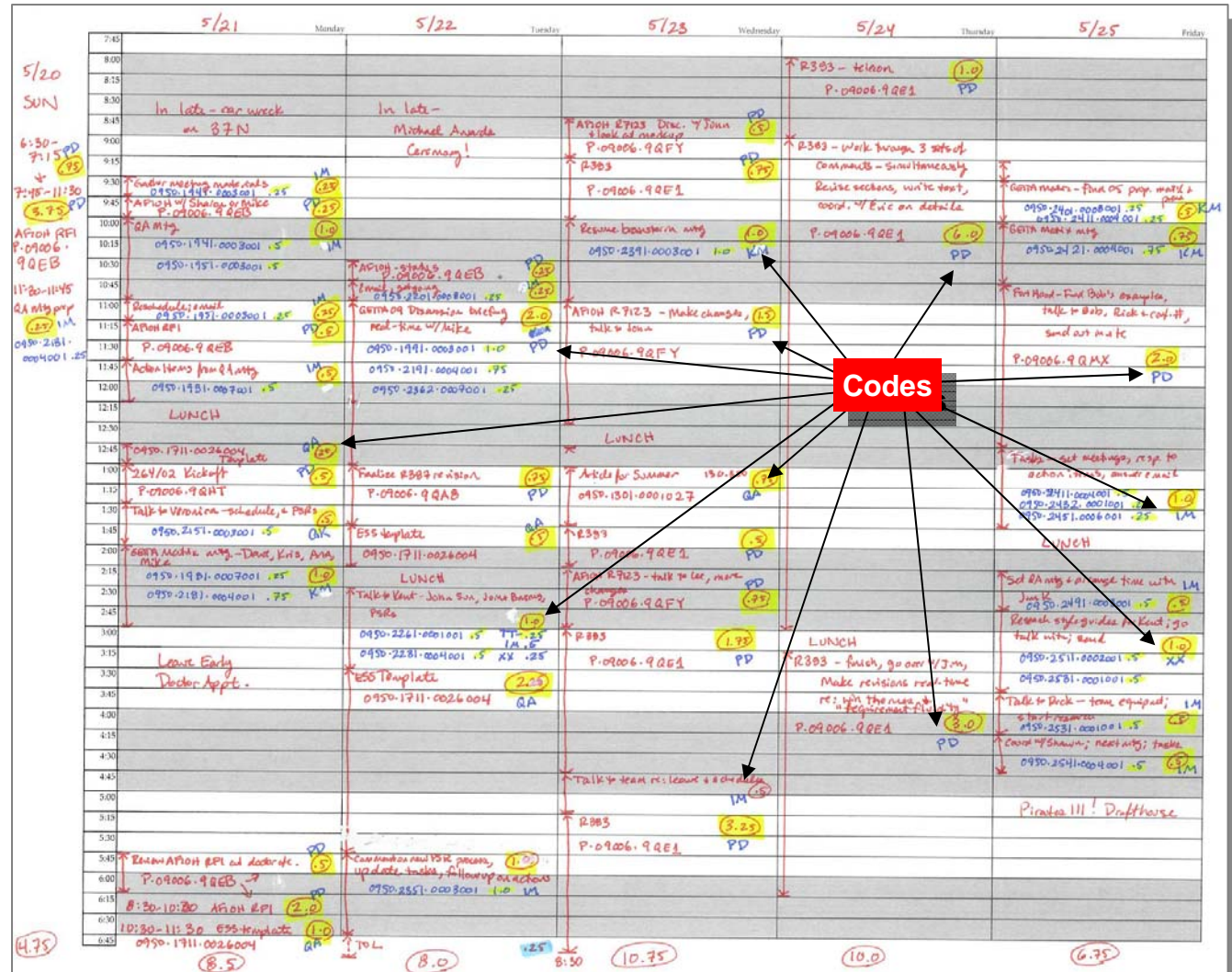
7. Total each category's time and record it in your spreadsheet

▸ If you use hard copy to log and code your time, tally it up manually; if you devise an electronic daily logging method, it can provide your totals

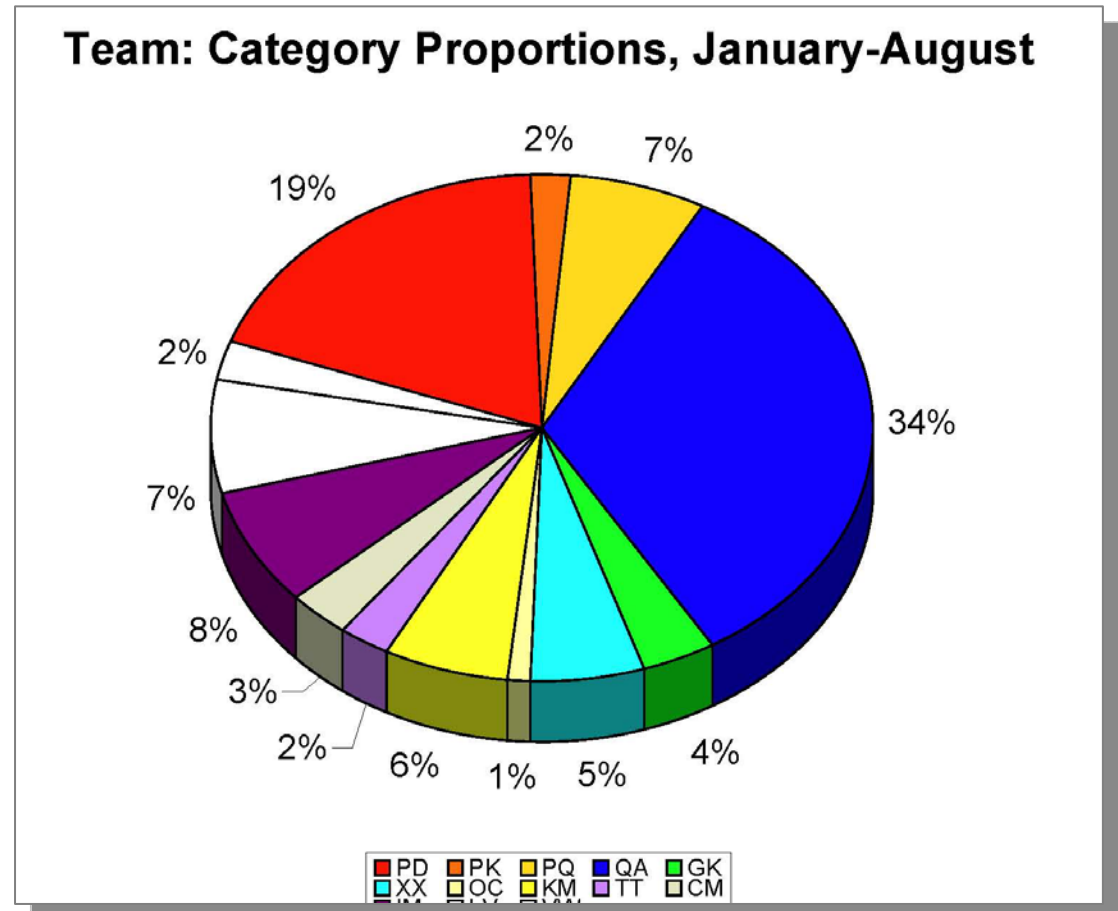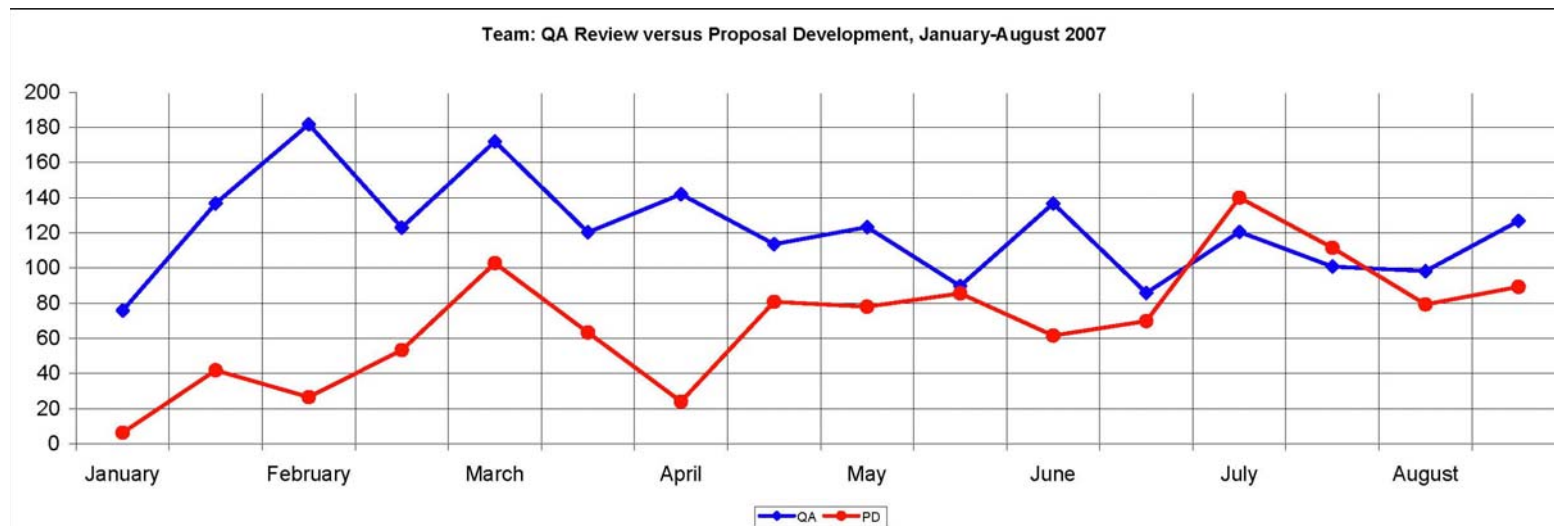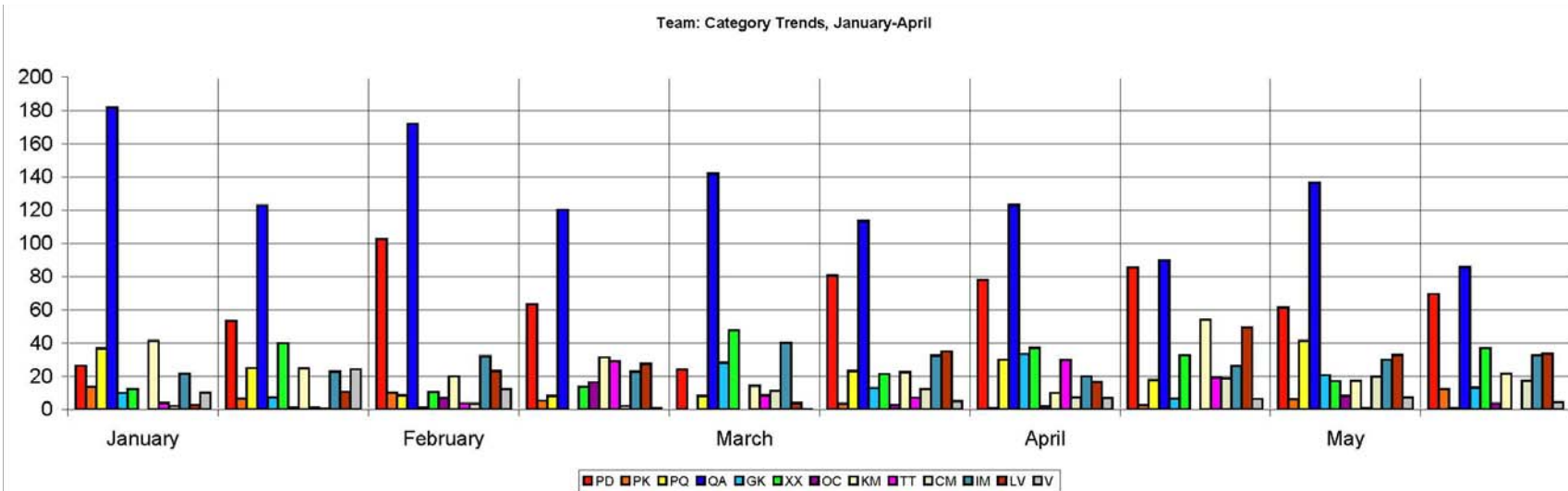| | Proposal Development/ Marketing | Quals Support | Proposal QA | Editorial Deliverable Review | PSR Inprocessing/ Gatekeeping | Project Work | Office Communi-cations | Knowledge Management/ Intellectual Capital | Toolbox and Training | Contract Management/ Processes | Internal Management | Leave | Volunteer Work | |
	PD	PK	PQ	QA	GK	XX	OC	KM	TT	CM	IM	LV	VW	Total
1/1-1/15	4.5	0.5	6.75	39.25	1.5	8.75		2.5	16.5	2.75	17.75	8	10.75	119.5
1/16-1/31	12.75	1.75	7.5	28.25	4.5	32.75		0.75	4	1	19.25		6.75	119.25
2/1-2/15	10.5	6.25	17.75	30.5	3	4.75		2.5	0.25	2.25	8.5		10	96.25
2/16-2/28	33.75	1.5	1.5	26.5	5.5	17.5		1.25	1.25	0.5	9.25		24.25	122.75
3/1-3/15	41.5		6	33	0.25	6.5		1.5	1.75	3.5	11.25		11.5	116.75
3/16-3/31	34.25	0.25	2.5	8	0	4	0	0	5.5	1.25	13.25	5.25		74.25
4/1-4/15	8.5	0	2.5	21.25	0	20.5	0	0.75	5.5	1.75	16.75	4		81.5
4/16-4/30	49.75	0	9.25	19.25	0	4	2	1	0.25	2.5	12.75	0	4	104.75
5/1-5/15	38.25	1	2	11.5	0	6.25	1.5	1.5	9.75	5.5	11.5	0.75	5.5	95
5/15-5/31	48.25	0	0.25	9.25	0.75	4	0	4.5	0.25	2.5	18.25	9	6.5	103.5
6/1-6/15	41.5	0.25	5.5	7	2	16.25	0	0.25	0	1.75	17.25	0	6.5	98.25
6/16-6/30	47.75	1.5	0	18.5	0.25	7.25	0	0.25	0	3	8.25	0	4.5	91.25
7/1-7/15	119.5	0	1	9.5	0	0	0	0	0.5	0.25	6.25	8	7	152
7/16-7/31	73.25	0	0	5.5	0	2.5	0	0	0	19.25	12.25	0	5	117.75
8/1-8/15	17.25	0.75	8.75	4.5	0	0.5	0	0	1.5	4.25	11.75	39.75	4.5	93.5
8/16-8/30	67.25	0.75	10.5	16.75	0.75	0	0.5	0	1.75	3.25	23.5	5.25	18.5	148.75
	648.5	14.5	81.75	288.5	18.5	135.5	4	16.75	48.75	55.25	217.75	80	125.25	

▸ This was my personal tab in our team worksheet; each member kept their own tab up to date

8. Use your data! Analyze your dataset as needed
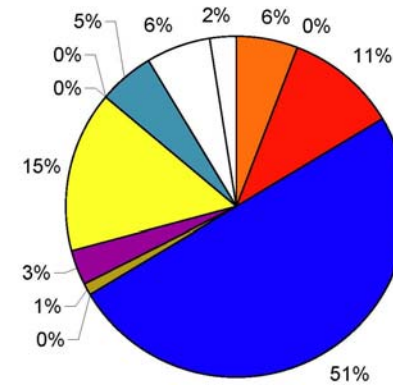
▸ And you now have.....NUMBERS!!!

▸ No data speaks for itself—it needs your help—but you can use it for many different purposes

▸ Following are some examples of what you can show with your dataset:

Team: Category Proportions, January-August

Team Trends—All or Selected Categories

Team: Category Trends, January-April

PD PK PQ QA GK XX OC KM TT CM IM LV V

Team: QA Review versus Proposal Development, January-August 2007

QA PD

Individual Trend:
Genevieve, January through April
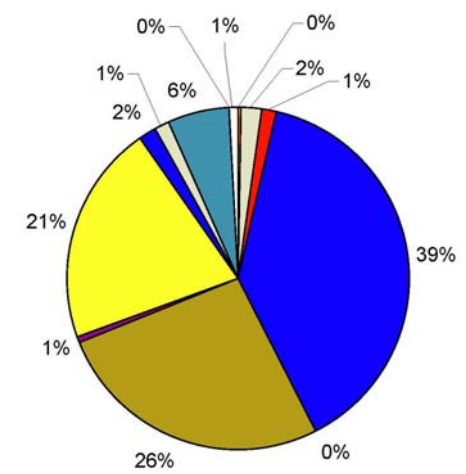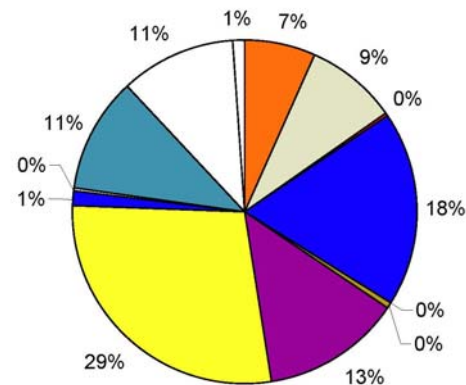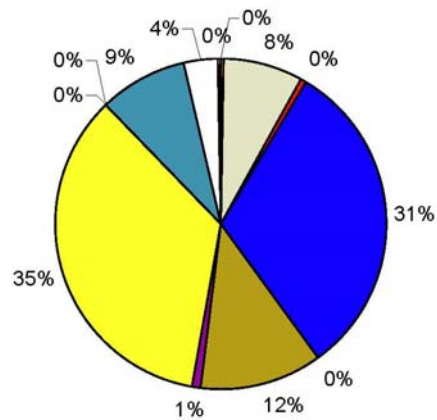
Tracking a Developing Need for Additional Staff

**Total Workload Against Requirements
(Four-Person Team, February-August 2007)**

Legend: ■ Four FTE Required ■ Team Hours Worked ■ Five FTE Required

Month	Four FTE Required	Team Hours Worked	Five FTE Required
February	640	670.5	800
March	704	735	880
April	672	697	840
May	736	792	920
June	672	722.25	840
July	704	766	880
August	736	855	920
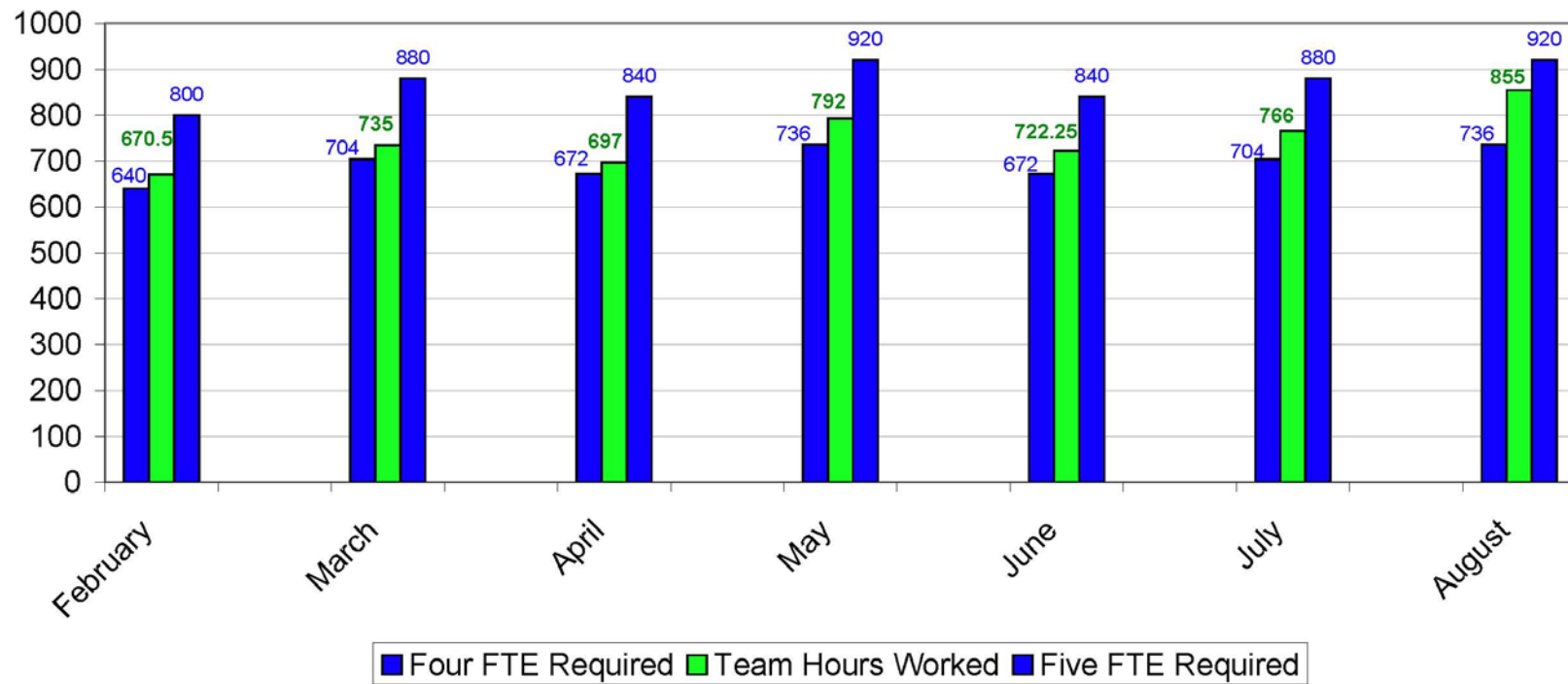
Leadership and colleague response to our ability to quantify and document our workload was overwhelmingly positive

▶ A little effort can immeasurably enhance your, and your team's, credibility as a practitioner of a bona fide profession

▶ What you do will be much more visible to leadership and colleagues—as well as easier to report, advertise, document, justify, and manage

Thank you for coming—and I would love to hear about your applications of this method!

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