



Return to Worksites Playbook

Informing the who, where, when, how
and beyond of limited-capacity worksites

April 2021



Intended audience

Primary users



Workplace Analytics end users (project lead and analysts) who plan to explore the business values and/or kick off analysis project(s) in this topic area

Note: Playbook content is designed for users with a basic level of understanding in Workplace Analytics



Workplace Analytics service delivery partners who plan to deliver service engagements in this topic area

Note: Partners are expected to be badged before accessing and utilizing the playbook content



Microsoft Sales, external sales partners, or other users who hope to acquire an understanding of how Workplace Analytics can be utilized in this topic area

Note: This is not intended to be a "scoping document" for service offerings

Notes

- The playbook aims to showcase the art of the possible in the topic area, thus, users will find in this document the latest thinking and analysis using Workplace Analytics data
- Provided with high level guidance and considerations to run projects and analysis, this playbook is not intended to be a technical how-to guide. For how-to instructions, please refer to the Workplace Analytics training resources or reach out to your Workplace Analytics support team

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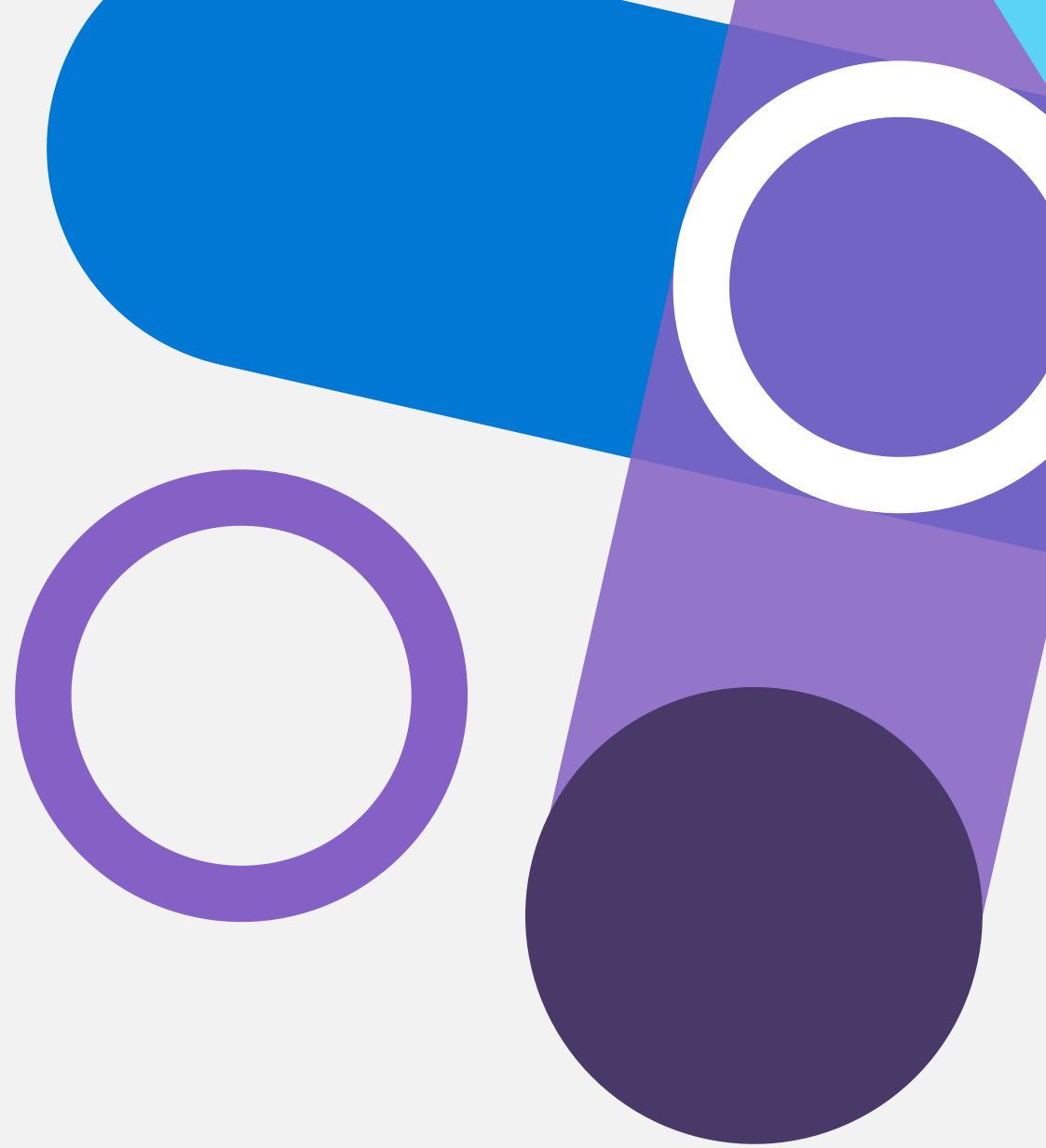
- Who?
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 - Expanded options for workspace allocation
 - Where?
 - Seating plan optimized for cross-team collaboration
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 - How?
 - Estimated meeting room usage
 - Suggested cleaning times
-

[Reimagining the workspace beyond Return to Worksites](#)

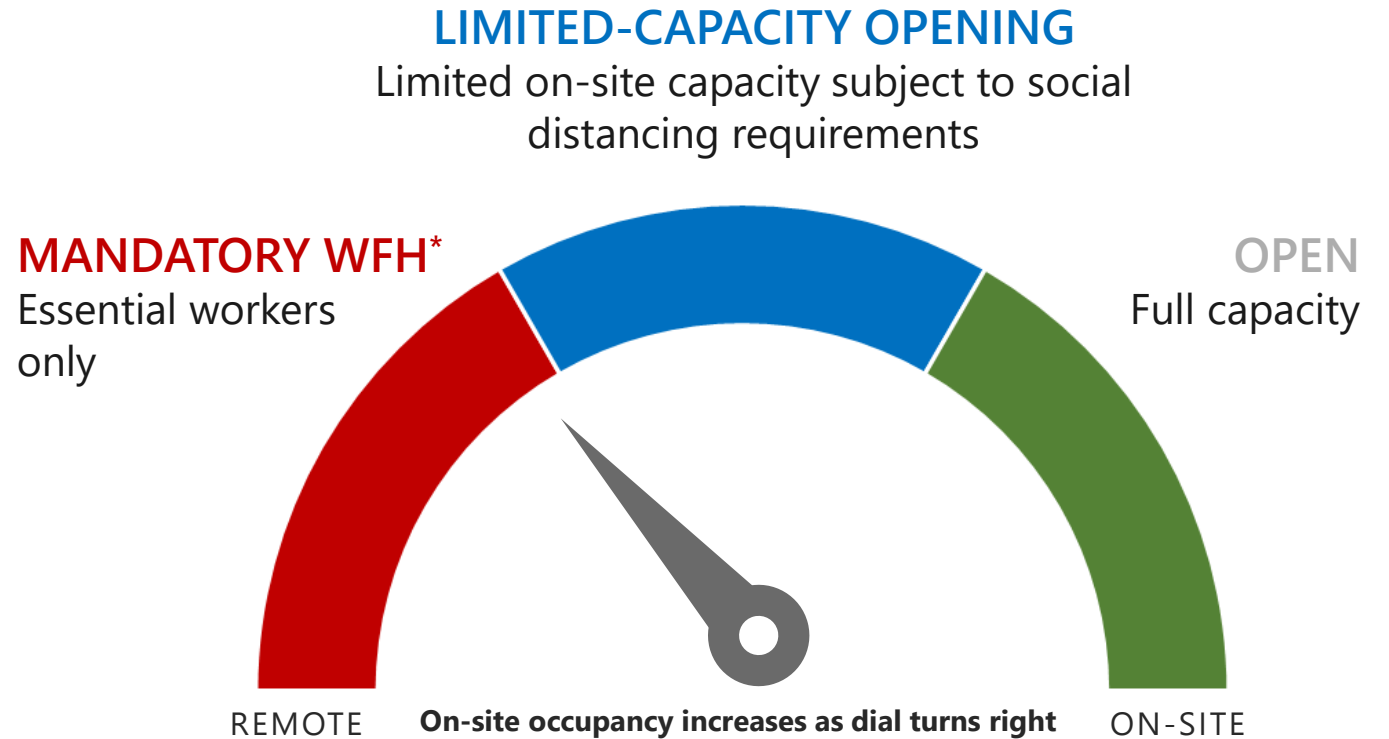
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Introduction



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



* WFH = working 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.



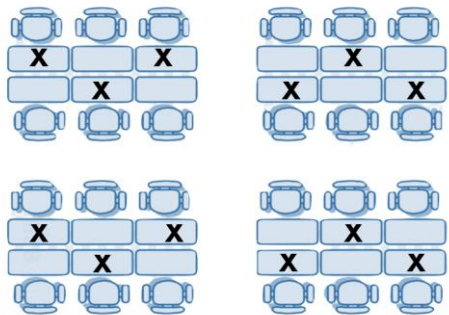
Site readiness and safety





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



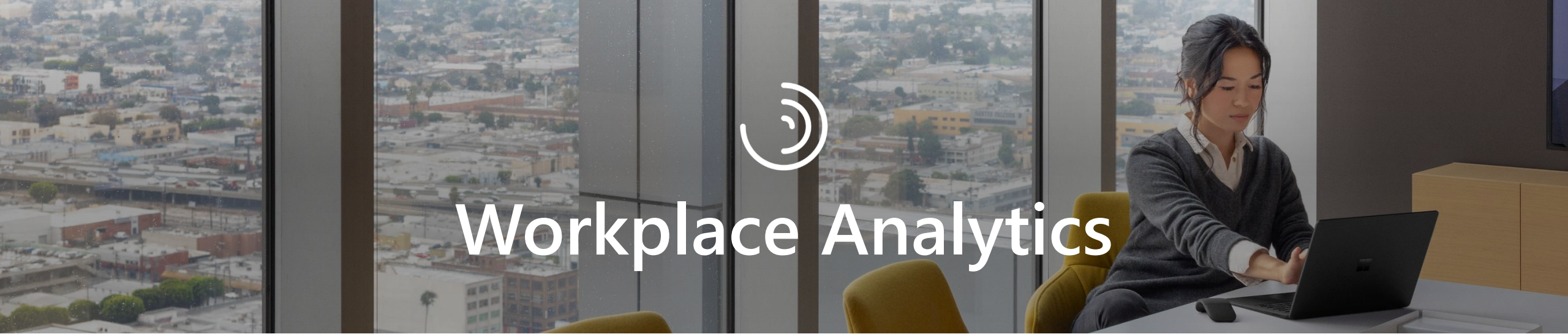
After deciding to return to work, companies will need to enforce capacity limits to ensure employee safety, creating several tactical challenges for each worksite

Workplace Analytics provides an **objective and data-driven** approach to informing the limited-capacity plan 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	Run worksite-specific analyses following the <i>Return to Worksites</i> Playbook
 When?*	Alternating-shifts schedule that optimizes cross-team collaboration with colleagues on the same shift	
 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



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

=

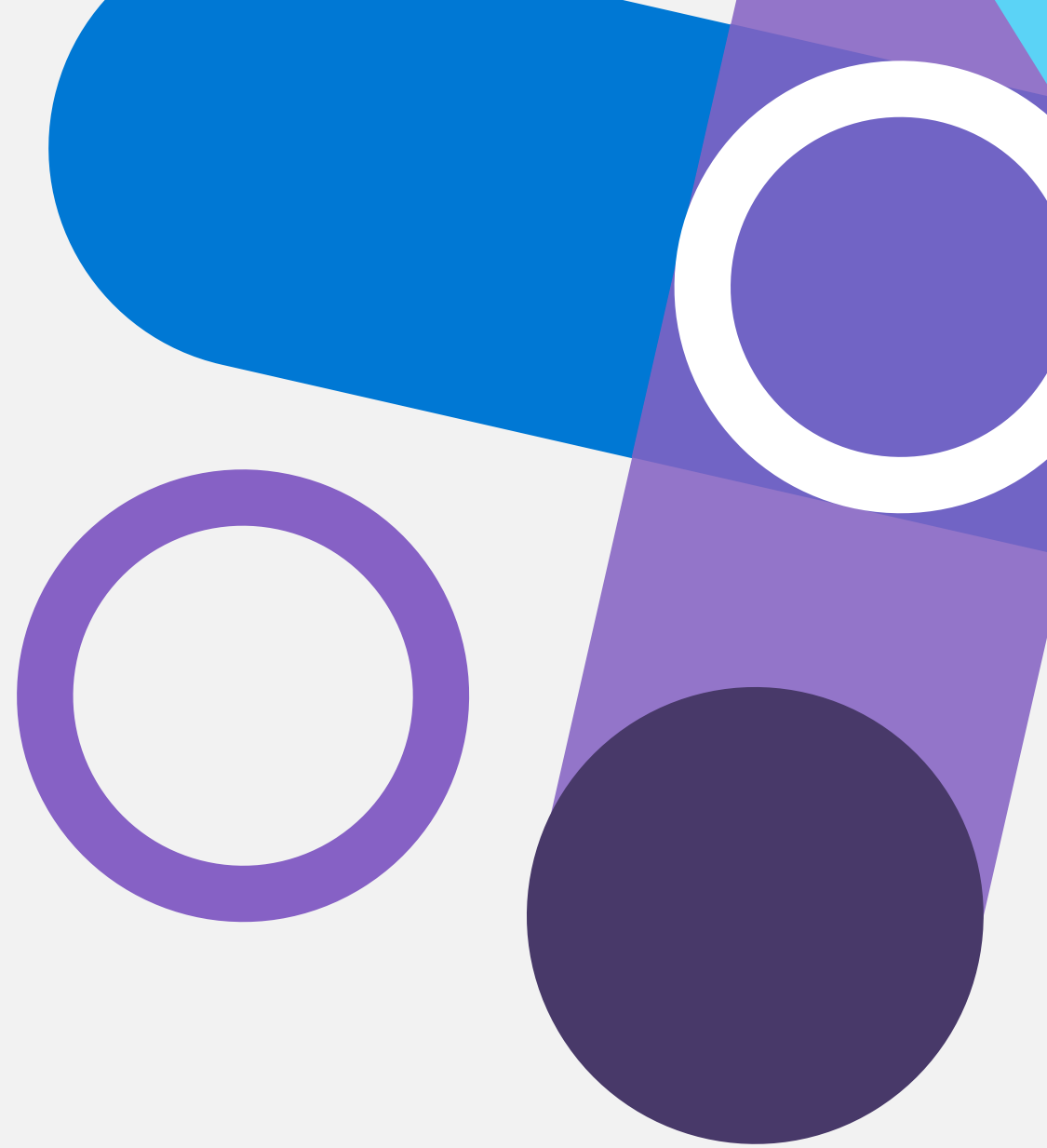


Actionable
insights

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

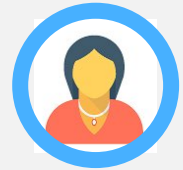
Return to worksites analyses



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



Project Manager Amy

4

Amy

15

Jay



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.

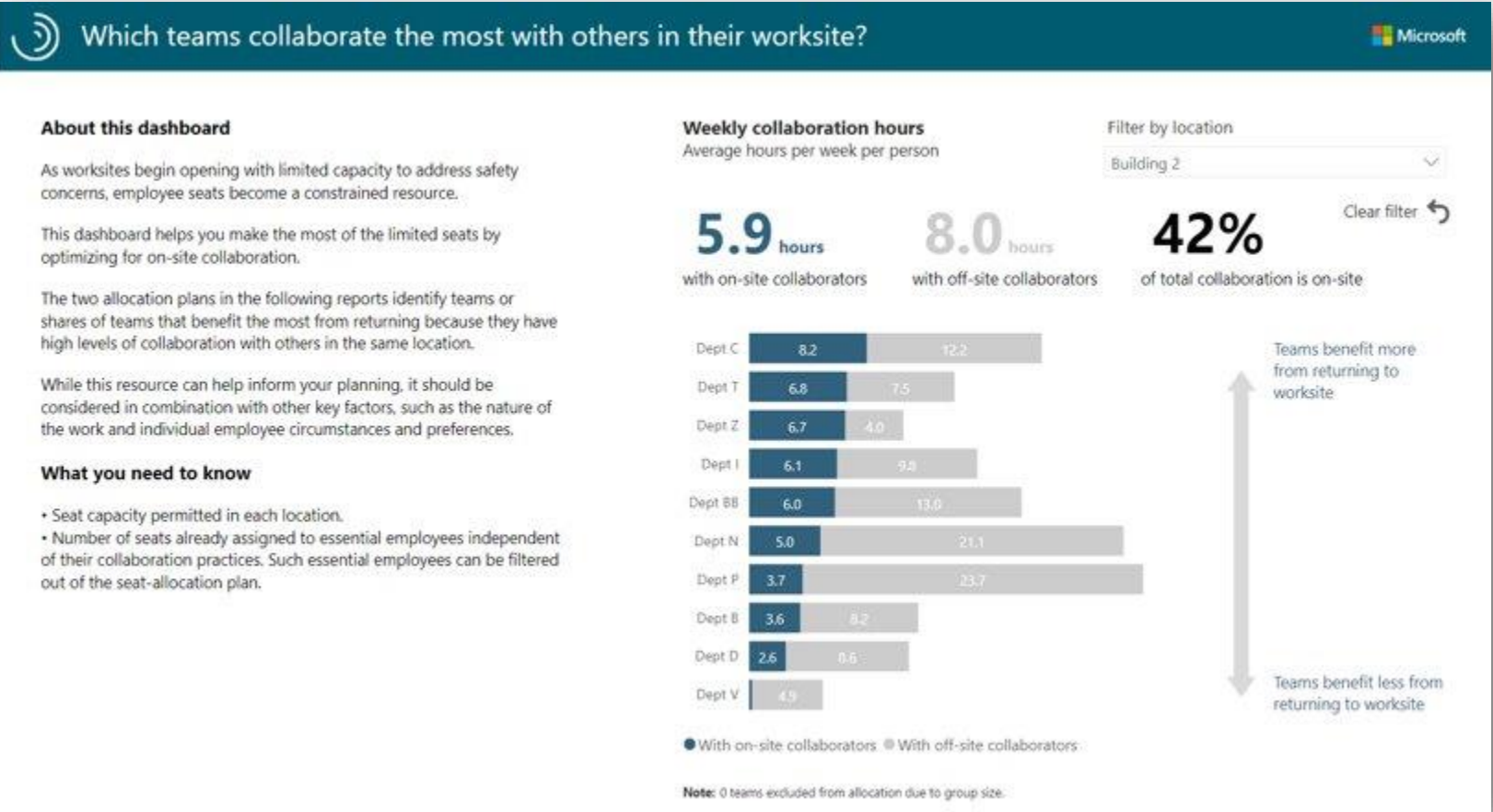
How to apply it

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



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.

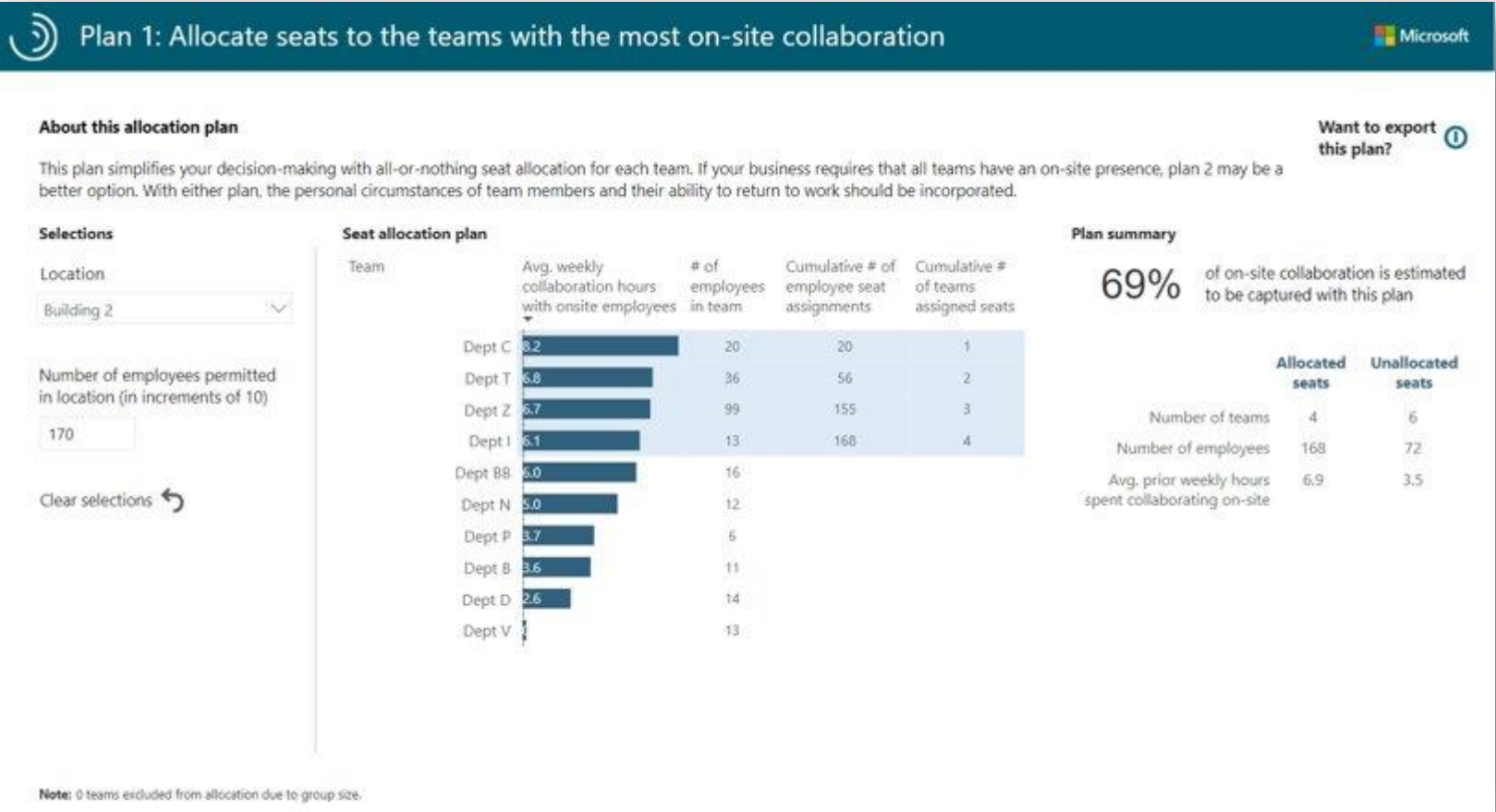
Prior to creating each plan, you will need to know the following:

- 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



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.

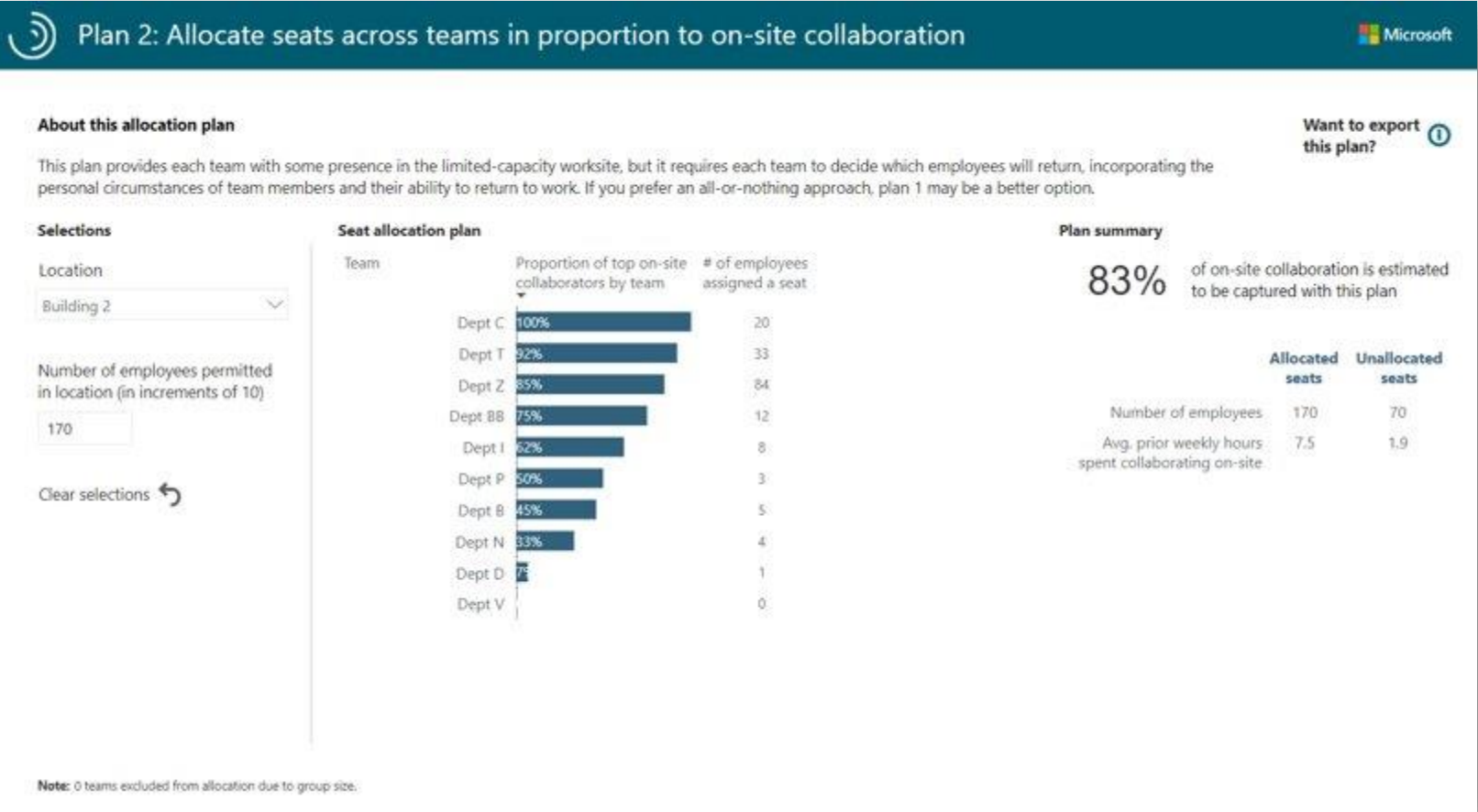
The plan simplifies the decisions for each leader, making it an all-or-nothing seat allocation for each team. If on-site leadership requires that all teams have some worksite presence during the limited-capacity opening, then Plan 2 might be the better option.

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



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.

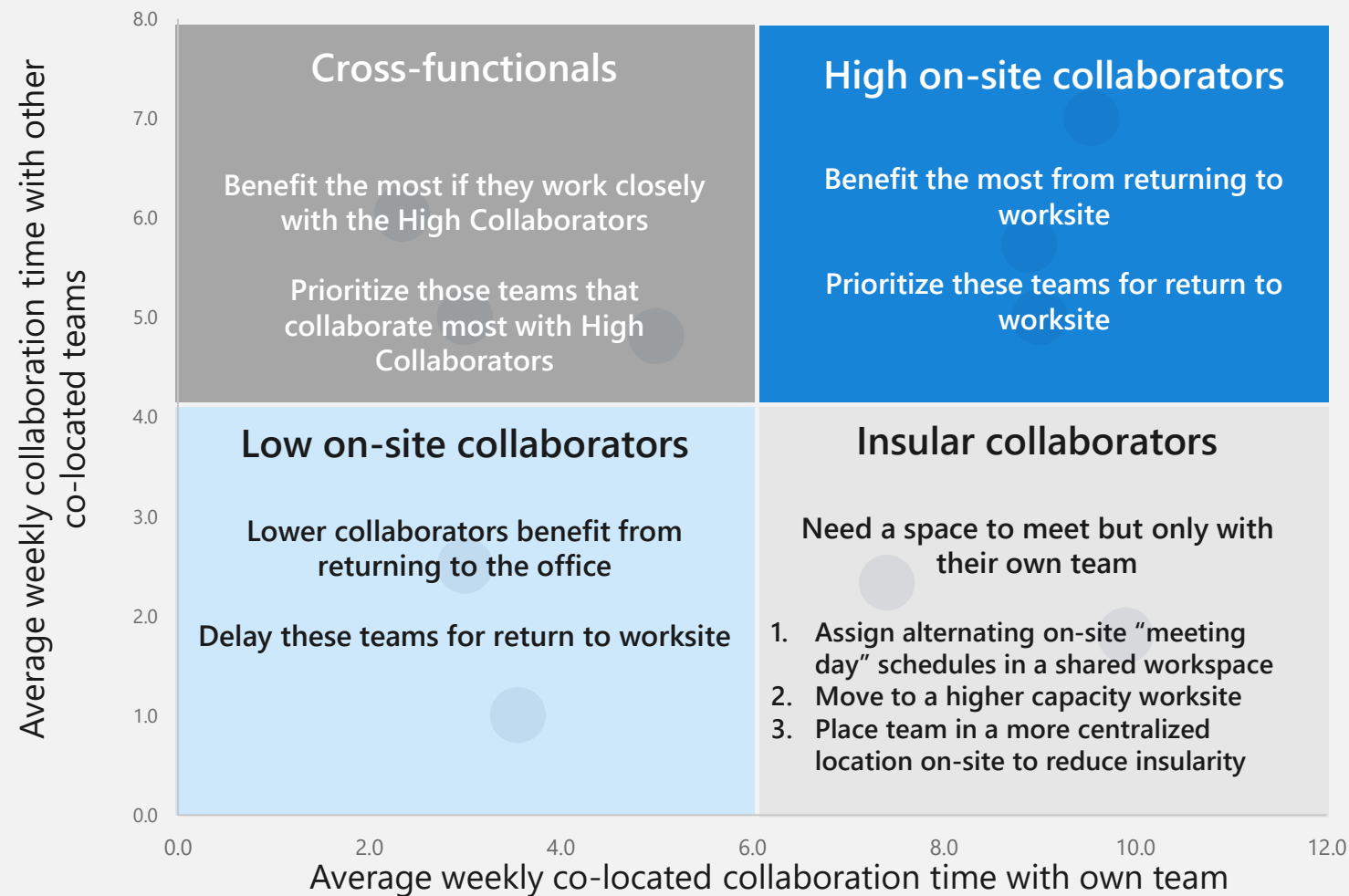
This option provides each team with some presence in a limited-capacity worksite. But it requires each team leader to determine how those workspaces will be allocated, considering other factors, such as personal circumstances of individual team members and their ability to return to work.

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

What teams should be prioritized to return to the office under office capacity constraints?



Mapping of teams to a return-to-worksites option based on 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 or a 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, on-site workspace



You can also review the [Return to worksites PBI template](#) to help with team-based seat allocation optimized for collaboration

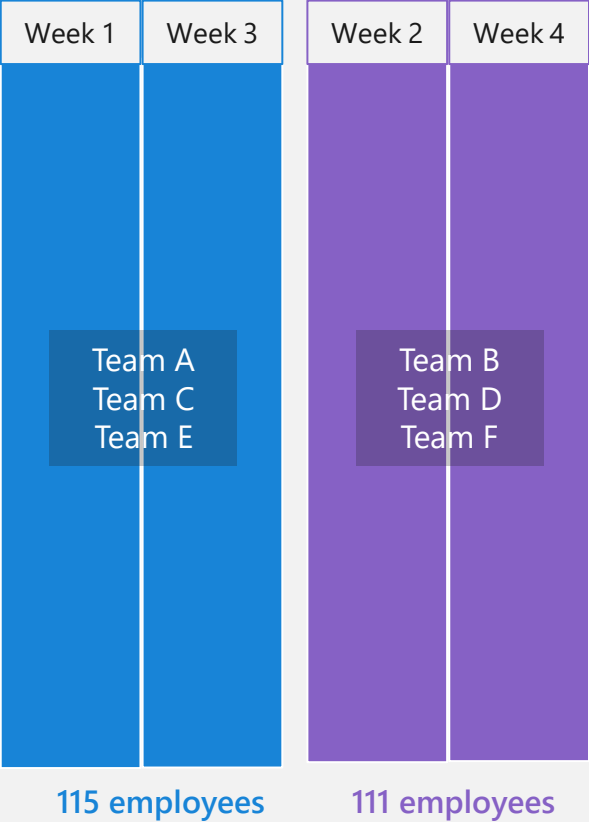
Which teams or functions will benefit by returning to the worksite on the same days, considering office capacity constraints?



Share of total collaboration hours allocated between on-site teams

	No. 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%

Use the Workspace optimizer tool to create an alternate-shift (daily or weekly), on-site schedule



What it tells us

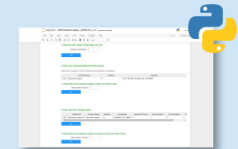
Scheduling alternating shifts is another approach to addressing limited-capacity worksites. Workplace Analytics splits the designated on-site teams into as close to 50% of the population in each of two “shifts” as possible, allowing teams to continue to work remotely for part of the month and be on-site 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

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



Use the Workspace optimizer tool to create alternating shift schedules that optimize for co-scheduling teams that collaborate the most

Who should sit next to who to optimize for collaboration, under capacity constraints?

Share of total collaboration hours allocated between on-site teams

	No. 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%



Use the Workspace optimizer tool to create your occupancy plan



What it tells us

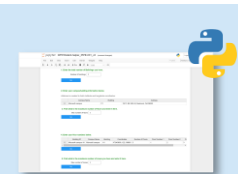
The resulting floor plan places teams that collaborate the most with each other on-site in as close proximity as possible, given the teams' degree of cross-collaboration, the number of employees by team and the workspace zone configuration

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

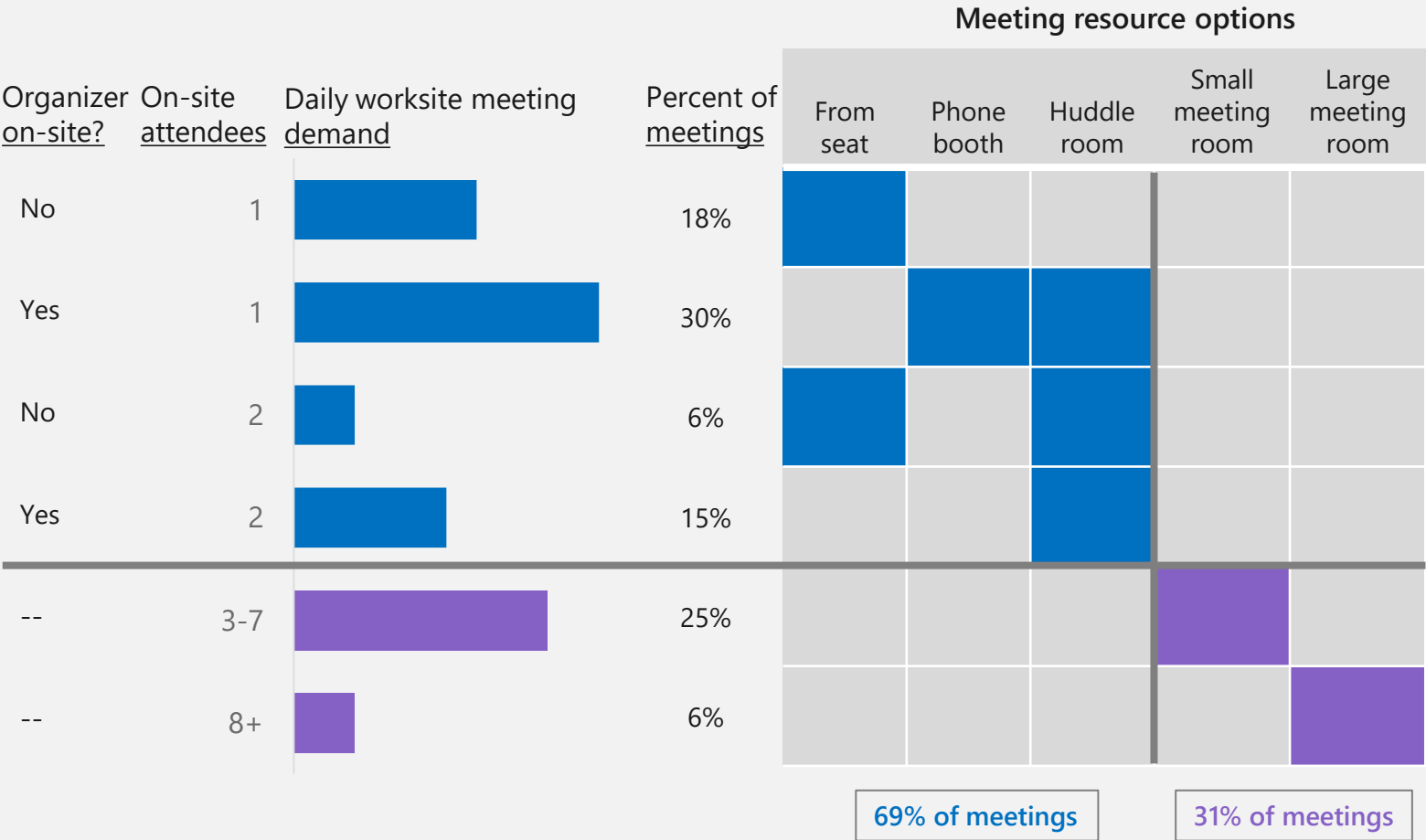


Use the Workspace optimizer tool to create occupancy plans that optimize for co-locating teams that collaborate the most

How to estimate meeting room usage that ensures safety protocols can be met?



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



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

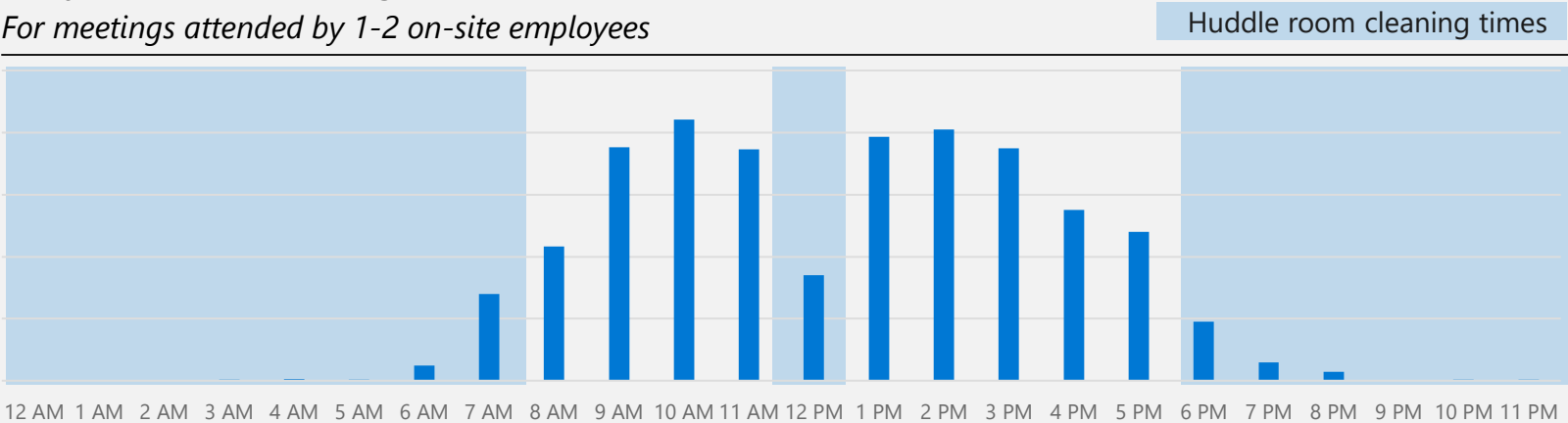
- Encourage teams to take meetings from their seats (with headsets), a phone booth, or a huddle room, particularly if they are not the organizers.
- Set minimum and maximum attendees for each huddle and meeting room, to promote usage of appropriately and safely-sized meeting rooms. Update meeting resources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

How to identify the most opportune time slots during the day for meeting room sanitization?



Daily huddle room usage

For meetings attended by 1-2 on-site employees



What it tells us

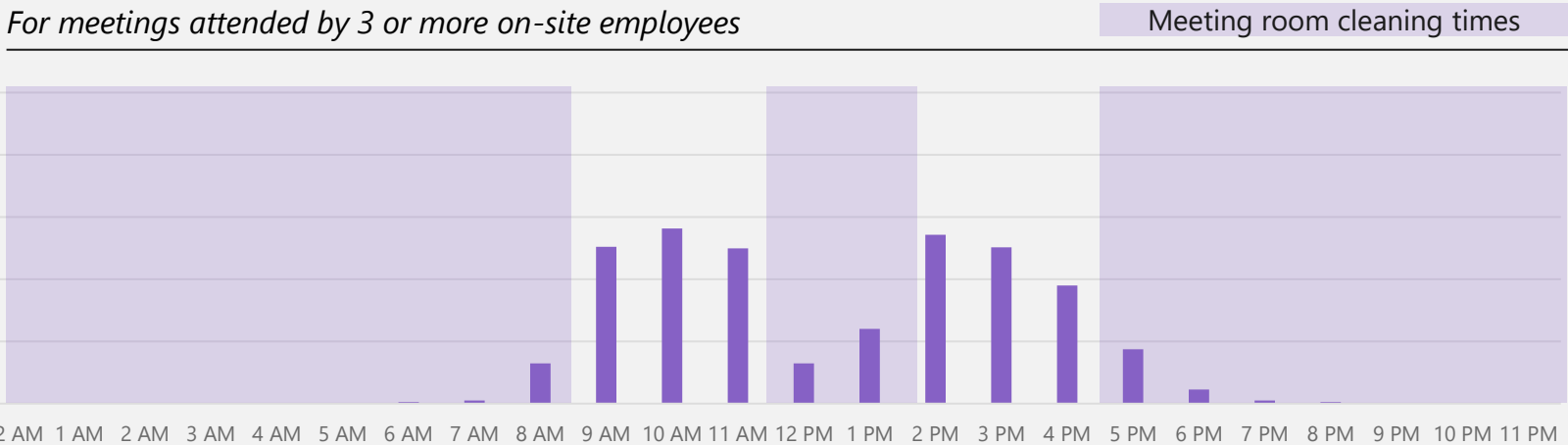
This report provides the estimated frequency of usage for meeting rooms by hour of day and can be divided by any available meeting size configuration, such as huddle rooms (1 to 2 on-site participants) or meeting rooms of any on-site attendee size.

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.

Daily meeting room usage

For meetings attended by 3 or more on-site employees



What are the meeting room size requirements for teams at different locations?

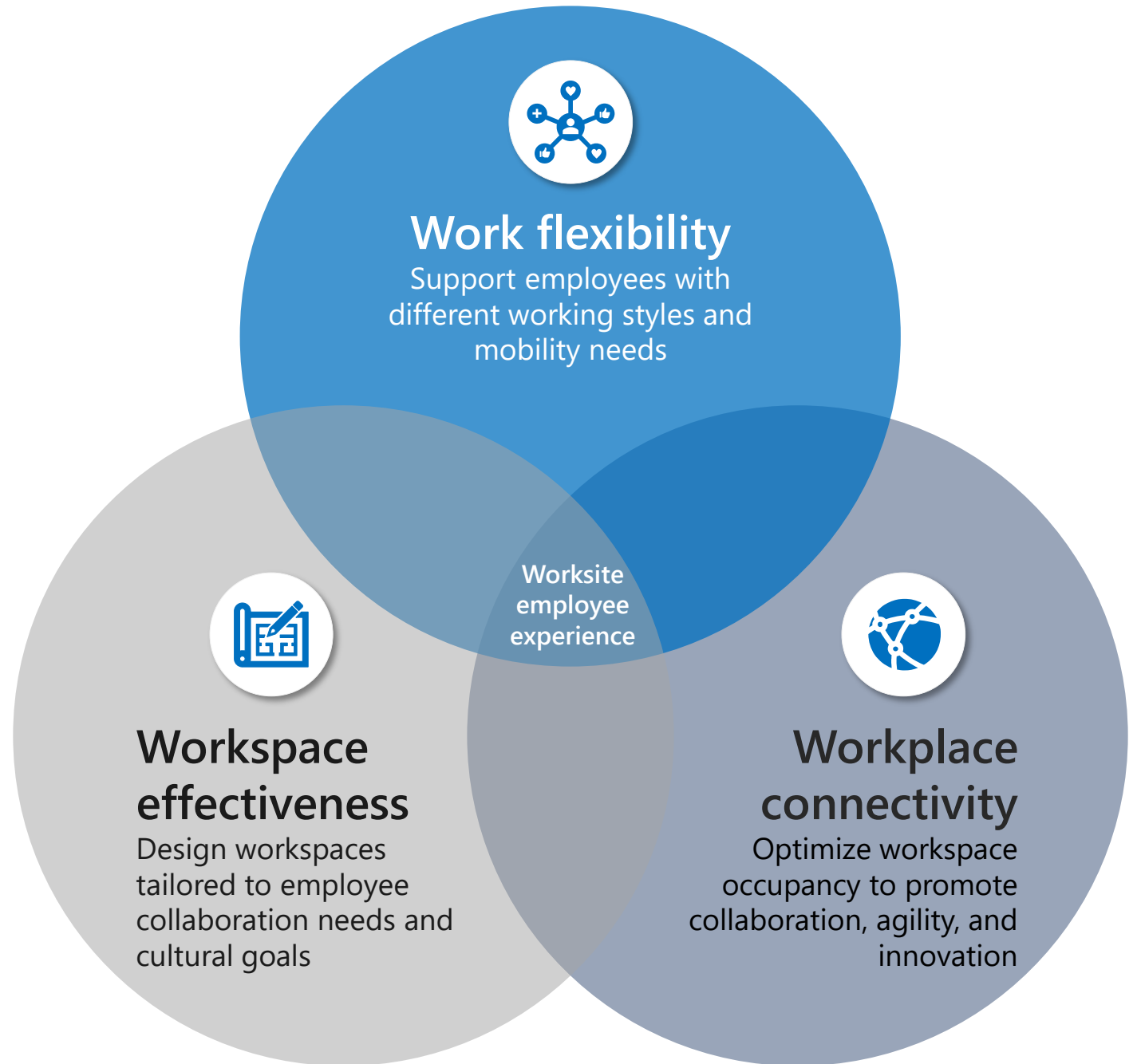
Alternatively, this analysis can be used to inform the maximum meeting room requirement for a particular building

- Take into account how flexible working schedules can influence the demand on different days of the week.
- Take into account how meeting rooms can support as overflow locations during hours in which the conversation rooms are in high demand.

Reimagining the workspace beyond returning to work



Viva Insights can enhance the employees experience in the physical workplace in three ways



Viva insights can help with workplace strategy and design that helps boost employees' worksite experience



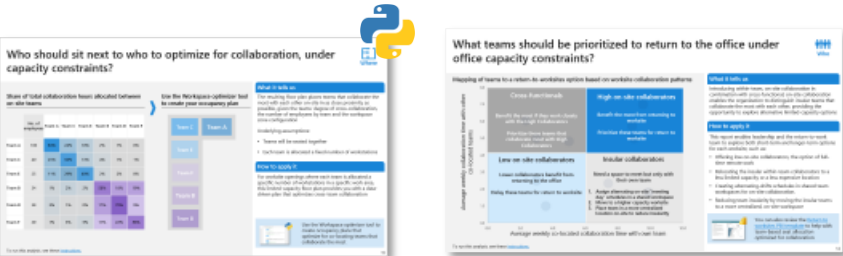
Workplace connectivity

Optimize workspace occupancy to promote collaboration, agility, and innovation

Business questions

- Who should sit next to whom to optimize for collaboration, decision-making speed, and innovation?
- What teams should be prioritized to return to the office under office capacity constraints?

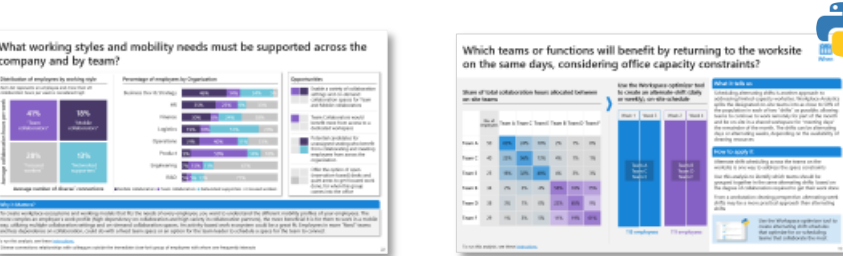
Examples



Work flexibility

Support employees with different working styles and mobility needs

- What working styles and mobility needs need to be supported across the company and by team?
- Which teams or functions would benefit by returning to worksites on the same days, considering capacity constraints?



Workplace effectiveness

Design workspaces tailored to employee collaboration needs and cultural goals

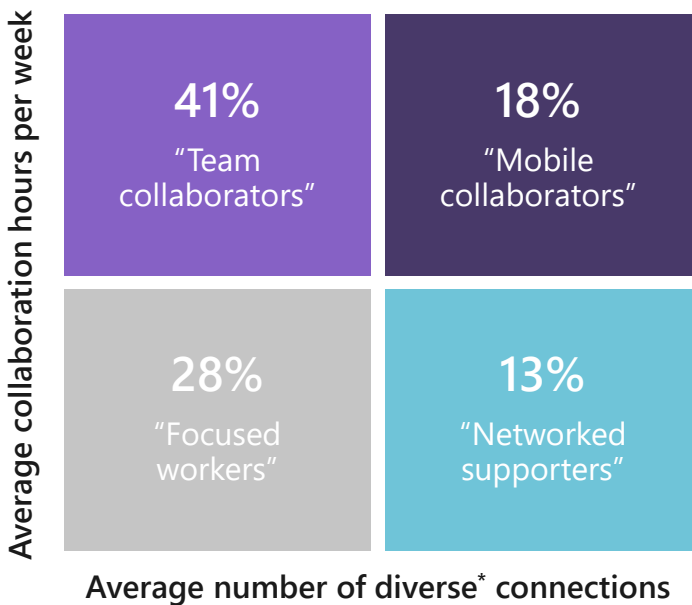
- What are the meeting room size requirements for various teams and locations?
- How to design office spaces to achieve cultural goals?



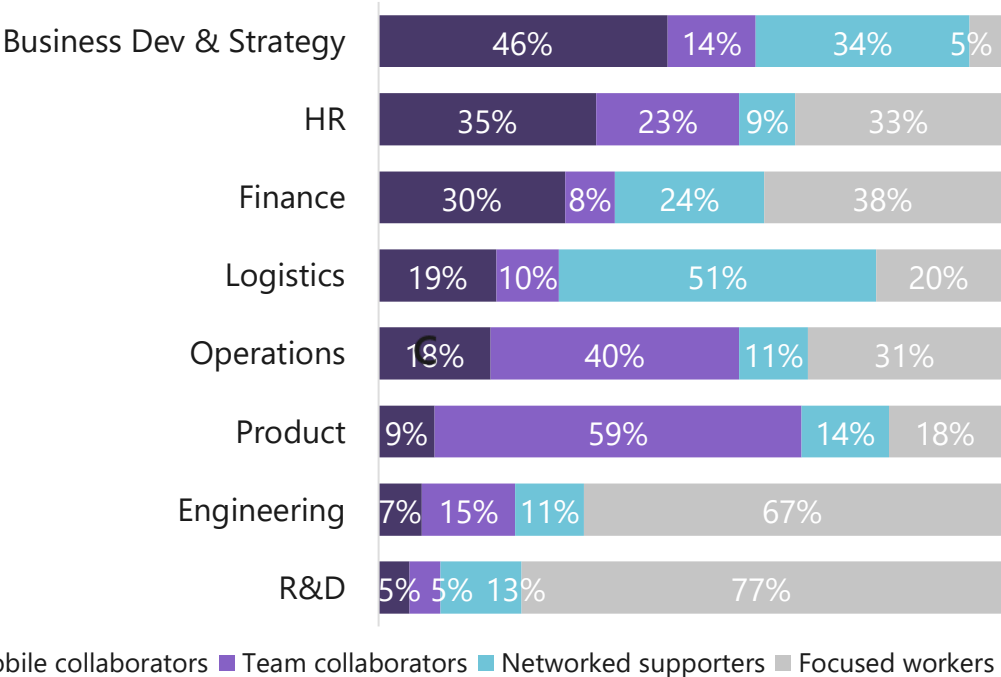
What working styles and mobility needs must be supported across the company and by team?

Distribution of employees by working style

Each dot represents an employee and more than 20 collaboration hours per week is considered high



Percentage of employees by Organization



Opportunities

- Enable a variety of collaboration settings and on-demand collaboration spaces for Team and Mobile collaborators
- Team Collaborators would benefit most from access to a dedicated workspace
- Potential candidates for unassigned seating who benefit from collaborating and meeting employees from across the organization
- Offer the option of open (reservation-based) desks and quiet areas to get focused work done, for when this group comes into the office

Why it Matters?

To create workplace ecosystems and working models that fits the needs of every employee, you want to understand the different mobility profiles of your employees. The more complex an employee's work profile (high dependency on collaboration and high variety in collaboration partners), the more beneficial it is for them to work in a mobile way, utilizing multiple collaboration settings and on-demand collaboration spaces. An activity-based work ecosystem could be a great fit. Employees in more "fixed" teams and less dependence on collaboration, could do with a fixed team space or an option for the team leader to schedule a space for the team to connect

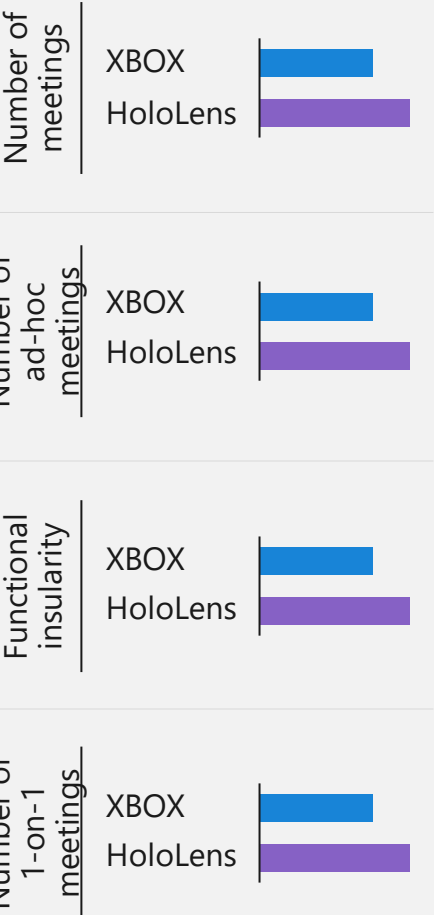
To run this analysis, see these [instructions](#).

* Diverse connections: relationships with colleagues outside the immediate close-knit group of employees with whom one frequently interacts

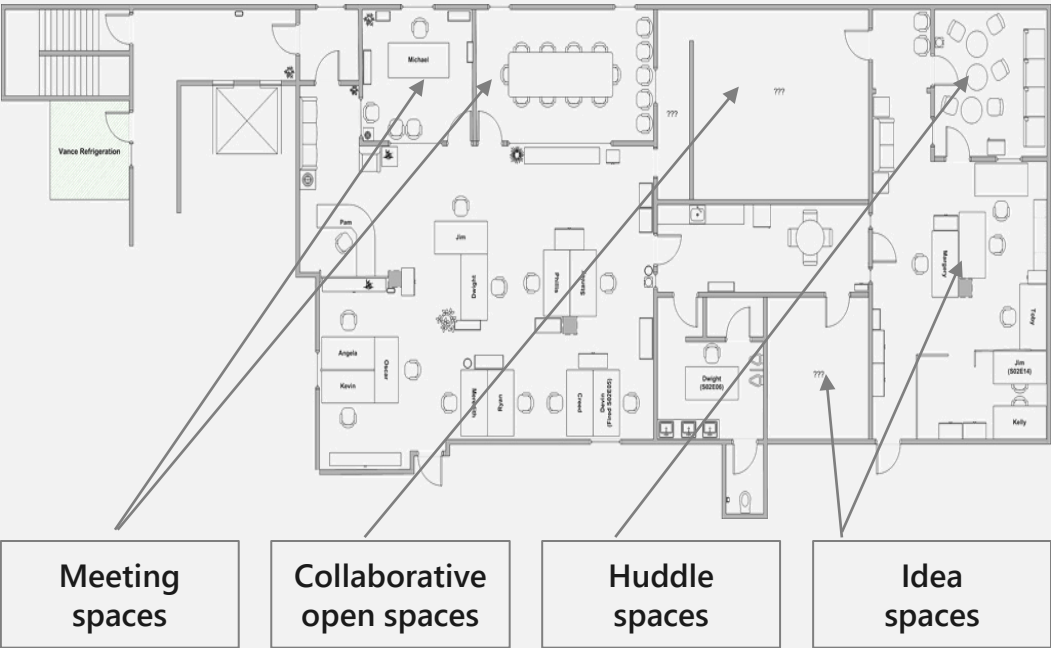
How can the office help achieve cultural goals?

Planning an office move for a diverse group of teams can be difficult. XBOX and HoloLens have very *different collaboration patterns* that require different space designs to accommodate their needs

Collaboration patterns



Space design enabling more collisions for HoloLens



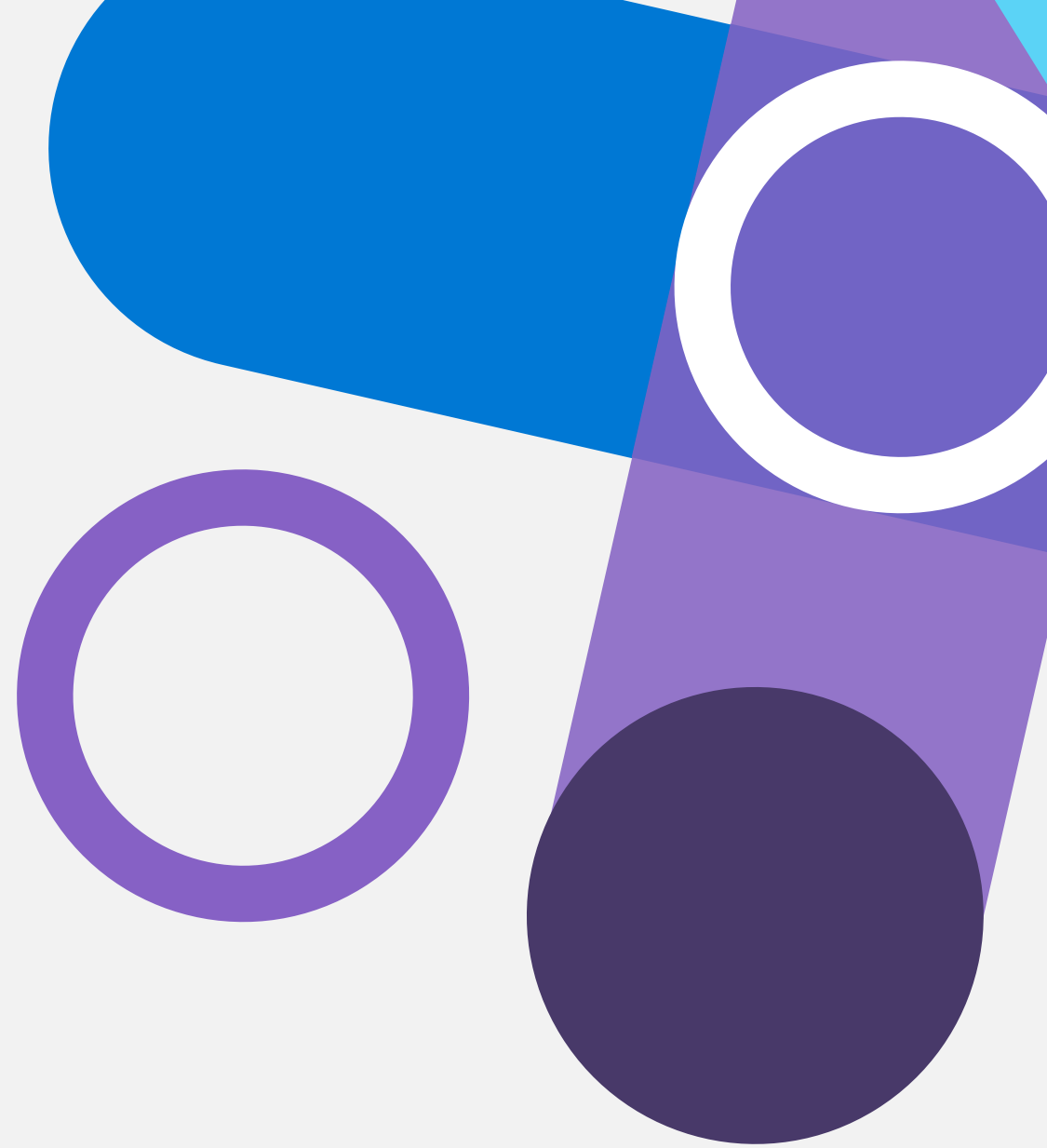
Insights

HoloLens has more of a meeting culture but is also more insular, which indicates a need for **space that enables more contact with others could be beneficial for HoloLens**

Opportunity

Design space for HoloLens with more meeting spaces, small break-out rooms, and open spaces to create opportunities for them to interact with people from other groups

Analysis 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: Use of this playbook requires [Analyst role](#) permissions in your company’s Workplace Analytics tenant. To create seating plans and alternate-shift 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:

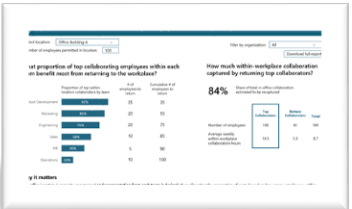
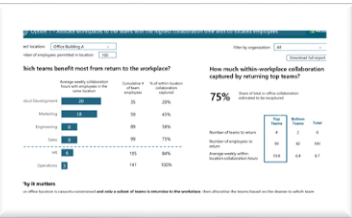
- 1. **Worksite location** - The attribute that represents the most recent worksite location (or projected location) for each employee
- 2. **Team/Organization** - Each employee’s team assignment that reflects the organizational level at which the limited-capacity worksite opening decisions are being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

Return to worksites analyses		Required tools		Inputs required
		Workplace Analytics	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	√		<ul style="list-style-type: none">• 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	√	√	<ul style="list-style-type: none">• Employee seats available in each worksite neighborhood or zone• 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 to run for each analysis

One query for all worksites



Who?

Workplace Analytics

One Person-to-group query

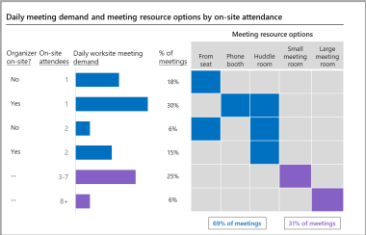
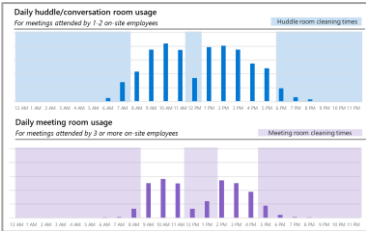
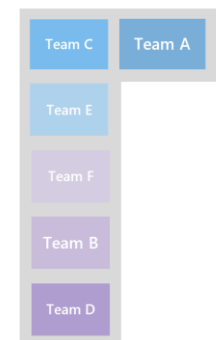
For more details and instructions, see [Return to worksites Power BI template](#)

A set of queries for each worksite

Use the Workspace optimizer tool to create your alternating-shifts (daily or weekly) on-site schedule



Use the Workspace optimizer tool to create your occupancy plan



Who?

Workplace Analytics

Two Person-to-group queries



When and where?

Workplace Analytics and Azure Templates

One Group-to-group query



How?

Workplace Analytics

One Meeting query



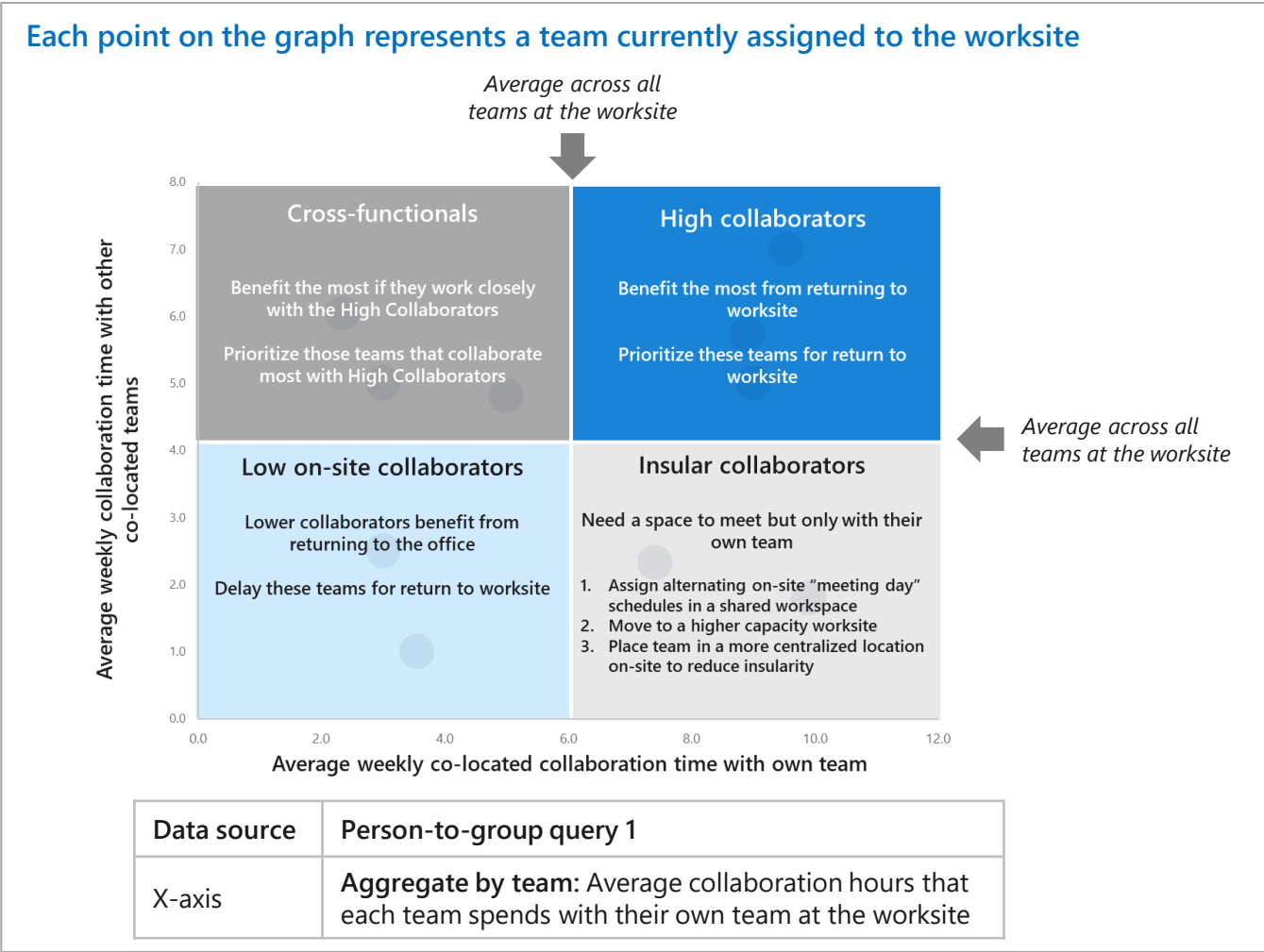
See [Supporting query instructions](#)

What teams should be prioritized to return to the office under office capacity constraints?



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

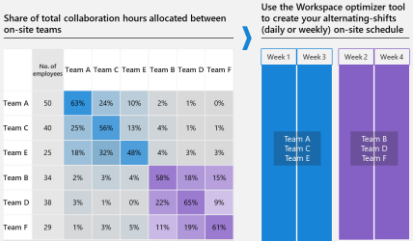
Data source	Person-to-group query 2
Y-axis	<div>1. Aggregate by team: Average collaboration hours that each team spends with others at the worksite</div> <div>2. Calculate by team: Team's Y-axis value = Average Collaboration hours (calculated from Step 1) - "Team's X-axis value"</div>



Which teams will benefit by returning to worksites on the same days, considering office capacity constraints?

Use the Azure Templates Workspace Planning optimization to create two alternate-shift schedules for each worksite

Follow the instructions in [Workplace Planning Azure Template](#) to create the alternate-shift schedules. The optimization will seat teams who collaborate the most 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)

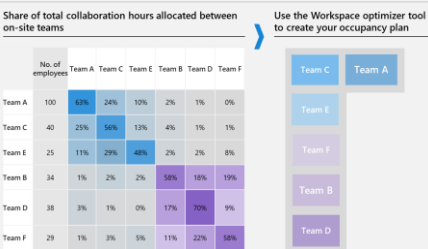
	Week1 - Week2	Week3 - Week4
Week1 - Week2	0	10
Week3 - Week4	10	0

Who should sit next to whom to optimize for 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 who collaborate 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:

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 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** where teams will sit in the worksite:

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 (walking distance) between neighborhoods or zones

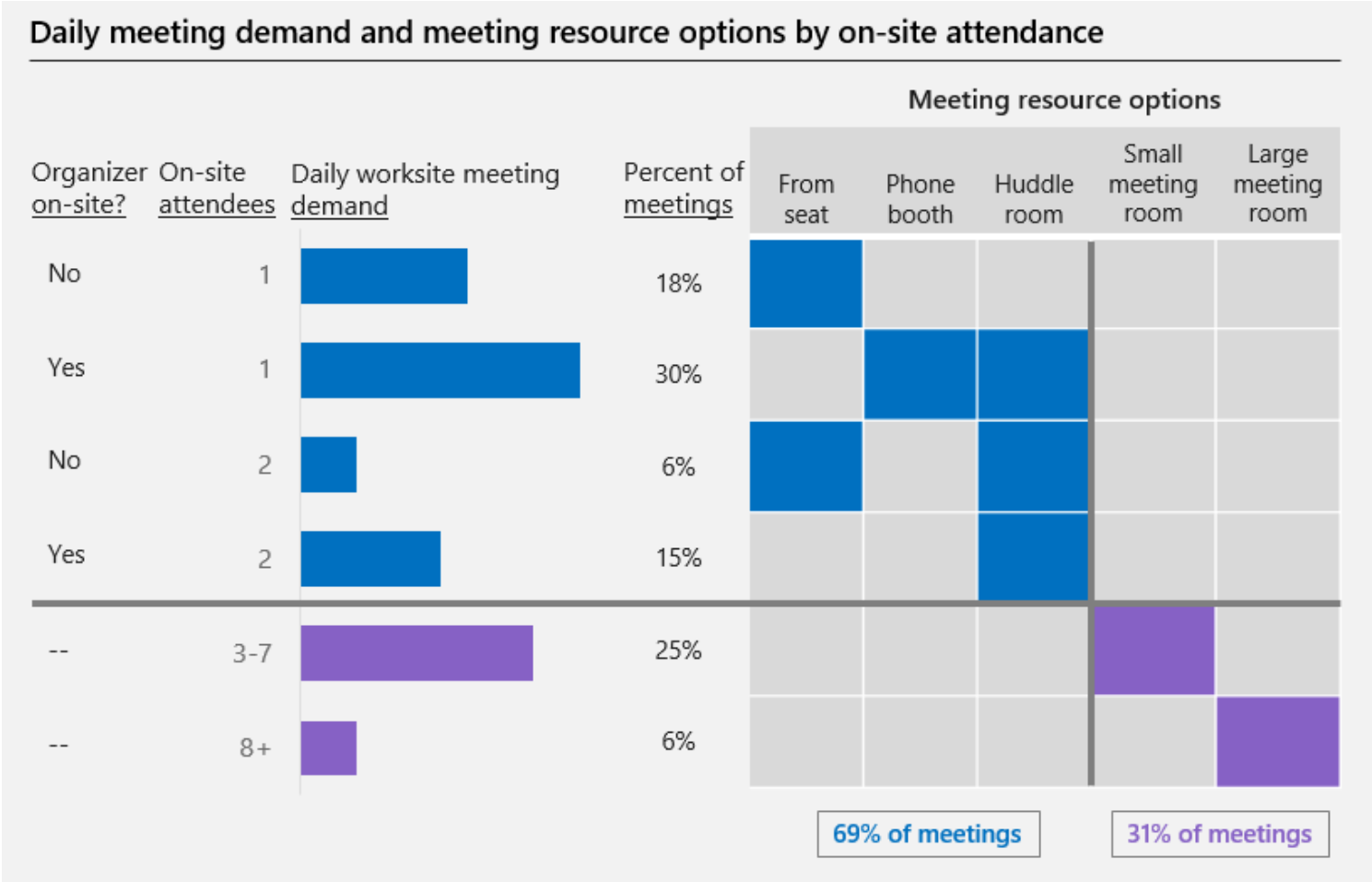
	NORTH-FLOOR-1	NORTH-FLOOR-2	NORTH-FLOOR-3
NORTH-FLOOR-1	0	0.75	0.75
NORTH-FLOOR-2	0.75	0	0.75
NORTH-FLOOR-3	0.75	0.92	0
NORTH-FLOOR-4	0.92	0.75	0.75
SOUTH-FLOOR-1	1	1.25	1
SOUTH-FLOOR-2	1.25	1.25	1.25

How to estimate meeting room usage that ensures 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: <ul style="list-style-type: none">- Organizer worksite location and 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, 2, 3-7, or 8+ people)

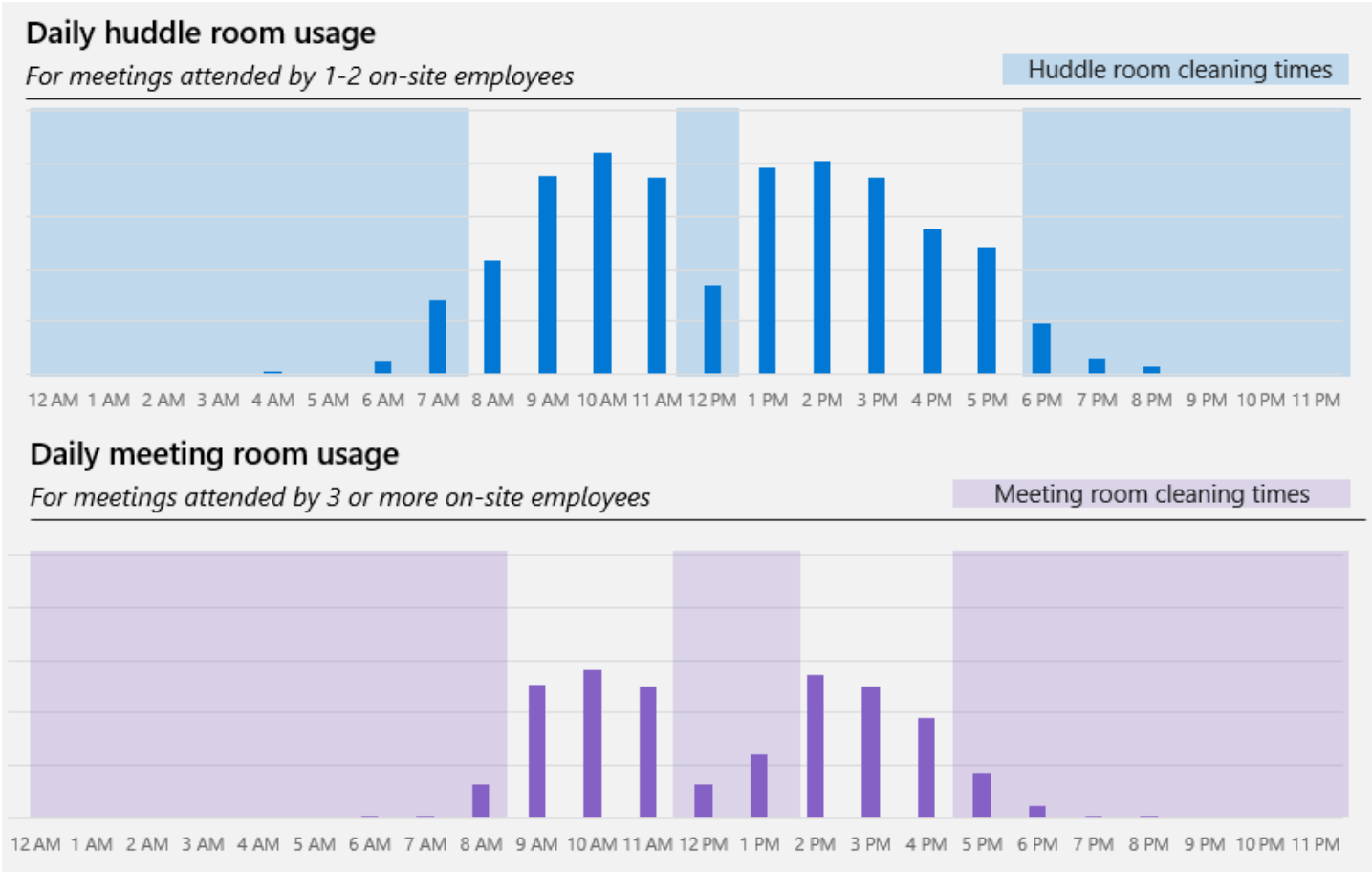


How to identify the most opportune time slots during the day for meeting room sanitization?



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 the preferred time intervals, such as at the top of the hour)
Y-axis	<div>Number of meetings aggregated by hour of day, and split into the preferred meeting room sizes, such as:</div> <ul style="list-style-type: none">• For daily huddle room usage, filter by worksite attendees less than 3• For daily meeting room usage, filter by worksite attendees greater than or equal to 3

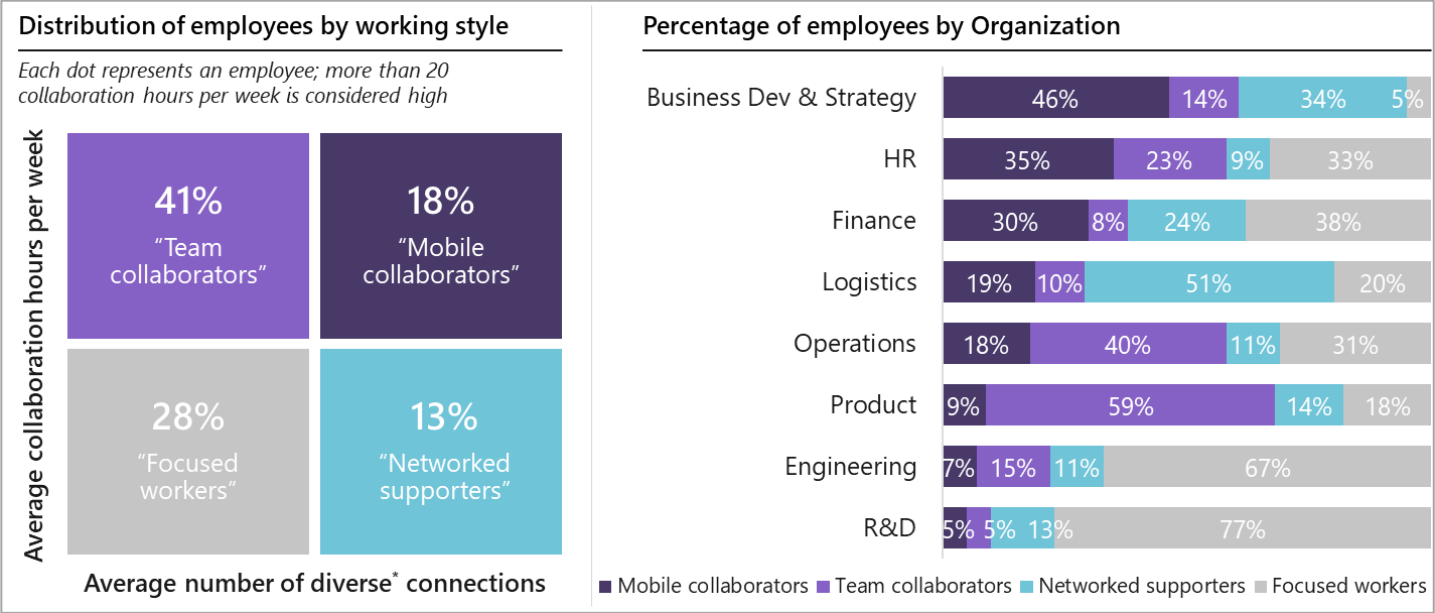


What working styles and mobility needs must be supported across the company and by team?

Plot each team at the worksite into a two-dimensional plot by using the outcome of a Person query and a Network:
Person-to-person query

Data source	Person query
Y-axis	Average collaboration hours by team/function

Data source	Network: Person-to-person query
X-axis	<div>1. Filter on Diverse tie types = 1*</div> <div>2. Aggregate the Diverse tie types by team or function</div>



* Diverse connections are relationships with colleagues outside the immediate close-knit group of employees with whom one frequently interacts

- Diverse tie type:
- 1: This row clearly indicates a diverse tie – 50th percentile and above, by diversity
 - 2: This row indicates a tie that is significant but less diverse: at or above the 45th percentile but below the 50th percentile
 - 0: This row indicates a tie that is not that diverse: below the 45th percentile

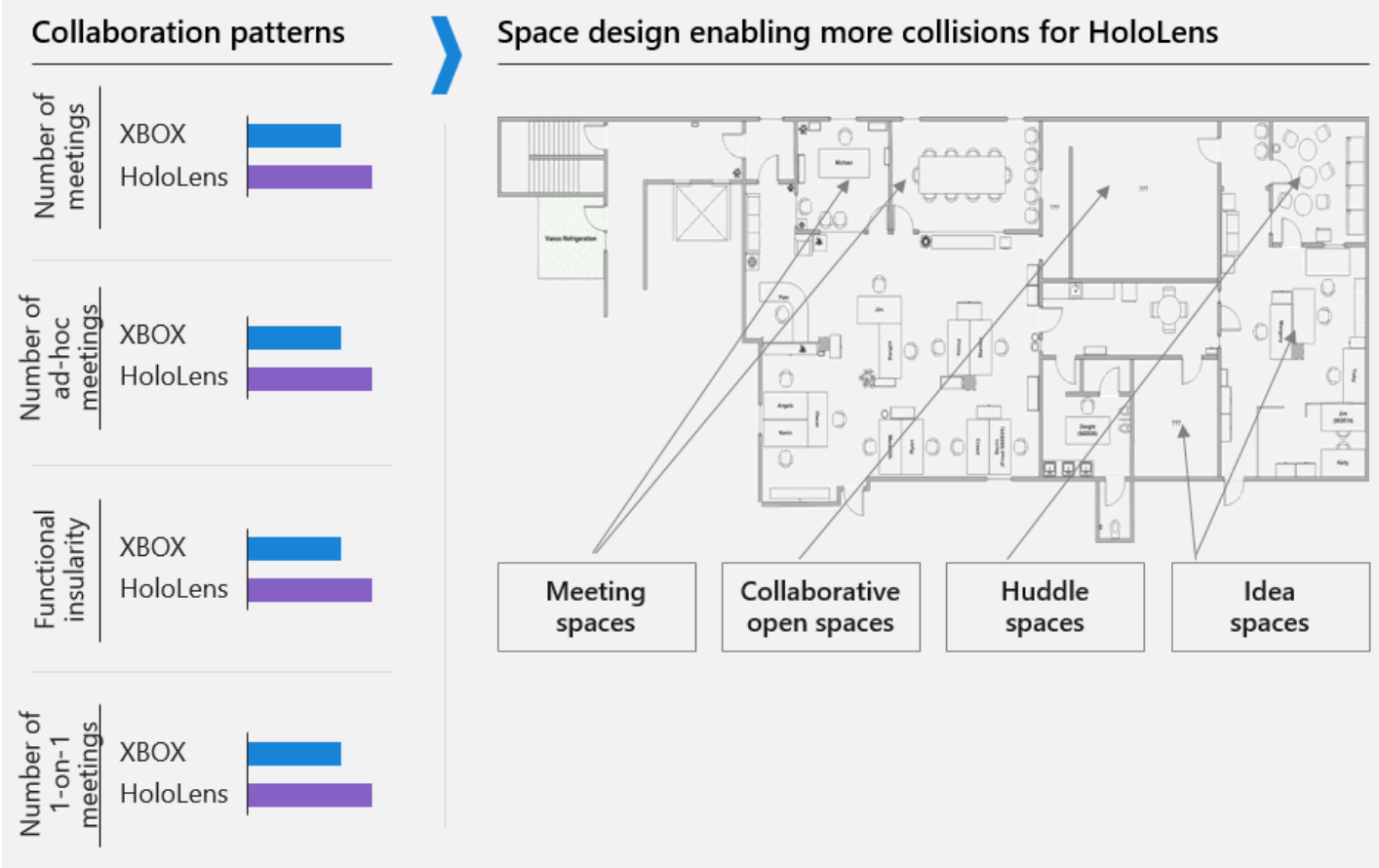
To learn more about strong and diverse tie scores, see [Organizational network analysis person-to-person queries](#).

How can the office help achieve cultural goals?

Identify metrics that can serve as proxies for the company or organization’s cultural goals and compare different teams on these metrics


Data source	Person query
Y-axis	<div>Average any metrics that serve as a proxy for the organization’s cultural goals. In this example teams are compared on:</div> <ul style="list-style-type: none">• Average number of meetings as compared to unscheduled meetings• Number of 1:1 meetings

Data source	Group-to-Group query
Y-axis: Functional insularity	Aggregate the total collaboration hours allocated across teams and determine what percentage of those collaboration hours is allocated to their own team



Appendix 1

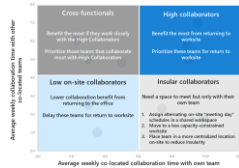
Supporting query instructions

 Workplace Analytics



Who? Instructions for two Person-to-group queries

For more details, see [Person-to-group queries](#)



Common to each query

Time period and meeting exclusions

Group by

Week

Time period

Last 3 months

☐ Auto-refresh ⓘ

Sun, 04/26/2020 to Sat, 07/25/2020

Meeting exclusions

Tenant Default Meeting...

Select a consistent time period and meeting exclusions for both query 1 and 2 and keep **Auto-refresh** unselected for both queries.

1 Select metrics

What would you like to know about the interactions? ⓘ

*

Collaboration hours

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

2 Time investors

Do you want to limit the analysis to only certain time investors? ⓘ

Employees

All employees

Office

Equals

1 selected

selected office ✕

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

How do you want to group the people who collaborated with the time investors? ⓘ

Organization

How do you want to group the people who collaborated with the time investors? ⓘ

Office

Do you want to focus the analysis on a particular set of collaborators and group all others as "Unclassified"? ⓘ

IsInternal

=

True

AND

Office

Equals

1 selected

selected office ✕

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

Which organizational data columns do you want to include for the time investors? ⓘ

4 out of 32 selected

Clear all

Organization ✕

LevelDesignation ✕

Business_unit ✕

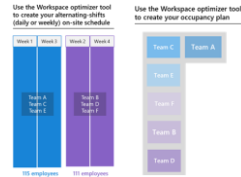
Office ✕

show less ^

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

For more details, see [Group-to-group queries](#)



Common to each query

Time period and meeting exclusions

Group by

Week

Time period

Last 3 months

Auto-refresh

Sun, 04/26/2020

to

Sat, 07/25/2020

Meeting exclusions

Tenant Default Meeting...

Select the same time period and meeting exclusions as the other queries. Keep **Auto-refresh** as unselected.

1 Select metrics

What would you like to know about the interactions? ⓘ

*

Collaboration hours

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

2 Time investors

How do you want to group the time investors? ⓘ

Organization

Do you want to limit the analysis to only certain time investors? ⓘ

Office

Equals

1 selected

selected office ✕

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

How do you want to group the people who collaborated with the time investors? ⓘ

Organization

Do you want to focus the analysis on a particular set of collaborators and group all others as "Unclassified"? ⓘ

Office

Equals

1 selected

selected office ✕

Do not exclude any collaborators.

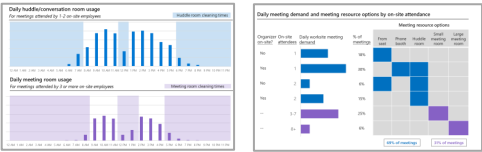
Select to group by the applicable team attribute that represents the level at which decisions at the worksite are made.

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

For more details, see [Meeting queries](#)



Common to each query

Time period and meeting exclusions

Group by

Week

Time period

Last 3 months

☐ Auto-refresh ⓘ

Sun, 04/26/2020 to Sat, 07/25/2020

Meeting exclusions

Tenant Default Meeting...

Select the same time period and meeting exclusions as the other queries. Keep **Auto-refresh** as unselected.

1 Select metrics

Base Metric

Type

Display Name

Attend...

Count

Worksite Attendees

Worksite Attendees where

Office

Equals

1 selected

selected office ✕

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

2 Select filters

Which meetings do you want to include in your query results? ⓘ

At least one attendee's

Office

Equals

selected office ✕

Filter by meetings with at least one worksite location attendee.

3 Organizational data

Which organizational data columns do you want to include for the time investors? ⓘ

4 out of 32 selected

Clear all

Organization ✕

LevelDesignation ✕

Business_unit ✕

Office ✕

show less ^

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