2023 Multi-Organizational Analysis

Data Science Team

December 2023

ProdoLabs™

Prodoscore™
Productivity Intelligence

Sample Descriptives

Sample Statistics

- 52,320,897 data points
- 5,734 employees
- 163 domains
- 226 modules

Activities

- Calendar
- Voice and Video
- Email
- Messaging & Chat
- CRM
- Web-Browser-Based Activity
- Documents

Client Facing	Support-Operational	Support-Operational Cont.
Sales	Operations	Legal
Customer Service	Manager	Human Resources
Account Manager	Administrator	Legal Assistant
Business Development	IT	Case Manager
Sales Support	Finance & Accounting	Intake Specialist
Outside Sales	Tech Support	
Inside Sales	Support	
Channel Sales	Attorney	
Pre-Sales Pricing	Recruiter	
Business Development – Minimal	Project Management	
Business Development – SFDC/Web	Paralegal	
Business Development – Hub/Web	Marketing	
Sales Engineering	Procurement	

Time Activities

Title	Type
SugarCRM: Calls	CRM
Talkdesk Calls	Voice and Video
Teams Call	Voice and Video
Teams Calls	Voice and Video
TurboBridge: Call	Voice and Video
VBC: Calls	Voice and Video
Vonage Business Cloud: Calls	Voice and Video
Webex Calls	Voice and Video
Webex Meetings	Voice and Video
Zendesk: Calls	CRM
Zoho Calls	Voice and Video
Zoho Events	Calendar
Zoho: Calls	Voice and Video
Zoho: Events	Calendar
Zoom Calls	Voice and Video
Zoom Meetings	Voice and Video
Zoom: Calls	Voice and Video
Zoom: Meetings	Voice and Video
inContact RC Calls	Voice and Video
inContact: RC Calls	Voice and Video

| Title	Type
Broadsoft: Call	Voice and Video
CRM calls	CRM
CRM meetings	CRM
Calendar event time	Calendar
Chrome Web Duration	Web-Browser-Based Activity
Cisco Voice Calls	Voice and Video
Conference calls	Voice and Video
Dialpad Calls	Voice and Video
Dialpad: Calls	Voice and Video
Fuze: Calls	Voice and Video
GoToConnect Calls	Voice and Video
Google Calendar	Calendar
Google Meet	Voice and Video
Office365 Calendar	Calendar
Phone Calls	Voice and Video
Phone system	Voice and Video
RingCentral Calls	Voice and Video
RingCentral Meetings	Voice and Video
Salesforce: Events	CRM

Count Activities

Title	Type	Title	Type	Title	Type	Title	Type
Ad Builder: Activity	Web-Browser-Based Activity	Crelate Companies	CRM	Litify Activities	CRM	Salesforce: New Leads	CRM
AdBuilder Activity	Web-Browser-Based Activity	Crelate Contacts	CRM	Litify Chatters	CRM	Salesforce: New Opportunities	CRM
Box.com Activities	CRM	Crelate Jobs	CRM	Litify Documents	CRM	Salesforce: Notes	CRM
Box.com: Activity	CRM	Crelate: Activities	CRM	Litify Matters	CRM	Salesforce: Orders	CRM
Bullhorn Candidates	CRM	Crelate: Companies	CRM	Litify Notes	CRM	Salesforce: Projects	CRM
Bullhorn Contacts	CRM	Crelate: Contacts	CRM	Litify Roles	CRM	Salesforce: SMS	CRM
Bullhorn Jobs	CRM	Crelate: Jobs	CRM	Litify: Activities	CRM	Salesforce: SMS Logged	CRM
Bullhorn Notes	CRM	CustHelp Activity	Web-Browser-Based Activity	Litify: Chatters	CRM	Salesforce: Ticket Updates	CRM
Bullhorn Sendout	CRM	CustHelp: Activity	Web-Browser-Based Activity	Litify: Documents	CRM	Salesforce: Tickets	CRM
Bullhorn Submission	CRM	Dialpad: SMS	Messaging and Chat	Litify: Matters	CRM	Salesloft Activity	Web-Browser-Based Activity
Bullhorn Tasks	CRM	DocuSign Activity	Web-Browser-Based Activity	Litify: Negotiations	CRM	Salesloft: Activity	Web-Browser-Based Activity
Bullhorn: Calls	CRM	DocuSign: Activity	Web-Browser-Based Activity	Litify: Notes	CRM	ServiceNow Incidents	CRM
Bullhorn: Candidate	CRM	Drive Activity	Docs	Litify: Roles	CRM	ServiceNow: Incidents	CRM
Bullhorn: Contacts	CRM	Dropbox Activities	CRM	Microsoft Outlook	Email	ServiceNow: Problems	CRM
Bullhorn: Jobs	CRM	Dropbox: Activities	CRM	Mobility Advisors: Documents	CRM	SharePoint Activities	CRM
Bullhorn: Leads	CRM	Dynamics Accounts	CRM	Mobility Advisors: Notes	CRM	Slack Chats	Messaging and Chat
Bullhorn: Notes	CRM	Dynamics Activities	CRM	Mobility Advisors: Work Orders	CRM	Slack: Chats	Messaging and Chat
Bullhorn: Opportunities	CRM	Dynamics Leads	CRM	Monday.com Activity	Web-Browser-Based Activity	SmartSearch Activity	Web-Browser-Based Activity
Bullhorn: SMS	CRM	Dynamics Opportunities	CRM	Monday.com: Activity	Web-Browser-Based Activity	SmartSearch: Activity	Web-Browser-Based Activity
Bullhorn: Submission	CRM	Dynamics: Accounts	CRM	Monster.com Activity	Web-Browser-Based Activity	SugarCRM: Leads	CRM
Bullhorn: Tasks	CRM	Dynamics: Activities	CRM	Monster.com: Activity	Web-Browser-Based Activity	SugarCRM: Notes	CRM
CRM leads	CRM	Dynamics: Cases	CRM	O365Web Activity	Web-Browser-Based Activity	SugarCRM: Tasks	CRM
CRM notes	CRM	Dynamics: Leads	CRM	O365Web: Activity	Web-Browser-Based Activity	Tableau Activity	Web-Browser-Based Activity
CRM opportunities	CRM	Dynamics: Opportunities	CRM	OneDrive Activity	Docs	Tableau: Activity	Web-Browser-Based Activity
CRM tasks	CRM	Emails read	Email	OneDrive activities	Docs	Tangoe Invoices	CRM
Chat lines	Messaging and Chat	Emails sent	Email	Other Websites Activity	Web-Browser-Based Activity	Teams Chat	Messaging and Chat
Chrome Web Activity	Web-Browser-Based Activity	Evolution1 Activity	Web-Browser-Based Activity	Outlook Read	Email	Zendesk Tickets	CRM
ConnectWise Companies	CRM	Evolution1: Activity	Web-Browser-Based Activity	PCRecruiter Activity	Web-Browser-Based Activity	Zendesk Tickets Activities	CRM
ConnectWise Opportunities	CRM	GitHub Commits	Github Development	PCRecruiter: Activity	Web-Browser-Based Activity	Zendesk: Ticket Activities	CRM
ConnectWise Projects	CRM	GitHub Pulls	Github Development	QuickBooks Activity	Web-Browser-Based Activity	Zendesk: Tickets	CRM
ConnectWise Service Tickets	CRM	GitHub: Commits	Github Development	QuickBooks: Activity	Web-Browser-Based Activity	ZipRecruiter Activity	Web-Browser-Based Activity
ConnectWise: Companies	CRM	GitHub: Pulls	Github Development	RingCentral SMS	Messaging and Chat	ZipRecruiter: Activity	Web-Browser-Based Activity
ConnectWise: Opportunities	CRM	Gmail	Email	RingCentral Team Messaging	Messaging and Chat	Zoho Accounts	CRM
ConnectWise: Projects	CRM	Google Chat	Messaging and Chat	SMS	Messaging and Chat	Zoho Emails	CRM
ConnectWise: Service Tickets	CRM	Google Drive activities	Docs	Salesforce Activity	Web-Browser-Based Activity	Zoho Leads	CRM
ConnectWise: Time & Expenses	CRM	Google Workspace Activity	Web-Browser-Based Activity	Salesforce: Accounts	CRM	Zoho Projects	CRM
Creatio Accounts	CRM	Google Workspace: Activity	Web-Browser-Based Activity	Salesforce: Activities	CRM	Zoho Purchase Order	CRM
Creatio Activities	CRM	HubSpot Activity	Web-Browser-Based Activity	Salesforce: Activity	Web-Browser-Based Activity	Zoho Purchases	CRM
Creatio Cases	CRM	HubSpot: Activity	Web-Browser-Based Activity	Salesforce: Assets	CRM	Zoho Tasks	CRM
Creatio Opportunities	CRM	IDI CostGuard Activity	Web-Browser-Based Activity	Salesforce: Calls	CRM	Zoho: Accounts	CRM
Creatio Orders	CRM	IDI CostGuard: Activity	Web-Browser-Based Activity	Salesforce: Calls Logged	CRM	Zoho: Emails	CRM
Creatio: Accounts	CRM	Indeed.com Activity	Web-Browser-Based Activity	Salesforce: Cases	CRM	Zoho: Leads	CRM
Creatio: Activities	CRM	Indeed.com: Activity	Web-Browser-Based Activity	Salesforce: Chatter	CRM	Zoho: Purchases	CRM
Creatio: Cases	CRM	LH1Ondemand Activity	Web-Browser-Based Activity	Salesforce: Contacts	CRM	Zoho: Tasks	CRM
Creatio: Opportunities	CRM	LH1Ondemand: Activity	Web-Browser-Based Activity	Salesforce: Deals	CRM	ZoomInfo Activity	Web-Browser-Based Activity
Creatio: Orders	CRM	LinkedIn Activity	Web-Browser-Based Activity	Salesforce: Emails	CRM	ZoomInfo: Activity	Web-Browser-Based Activity
Crelate Activities	CRM	LinkedIn: Activity	Web-Browser-Based Activity	Salesforce: Engage	CRM		

2023 Year Productivity
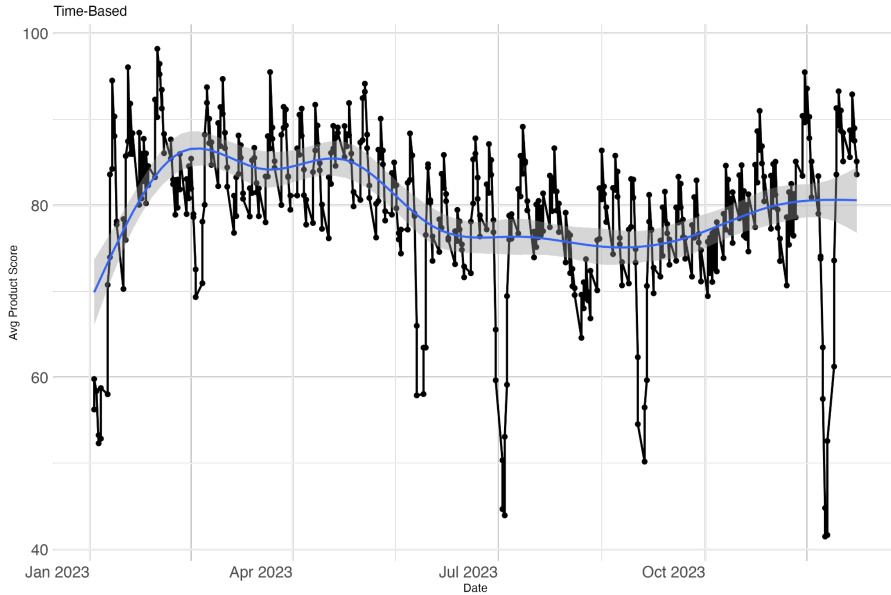
Productivity Trends in Time Based Activities "t": Most productive at the beginning of the year, drop off in April/May. Return to high productivity levels occur in October
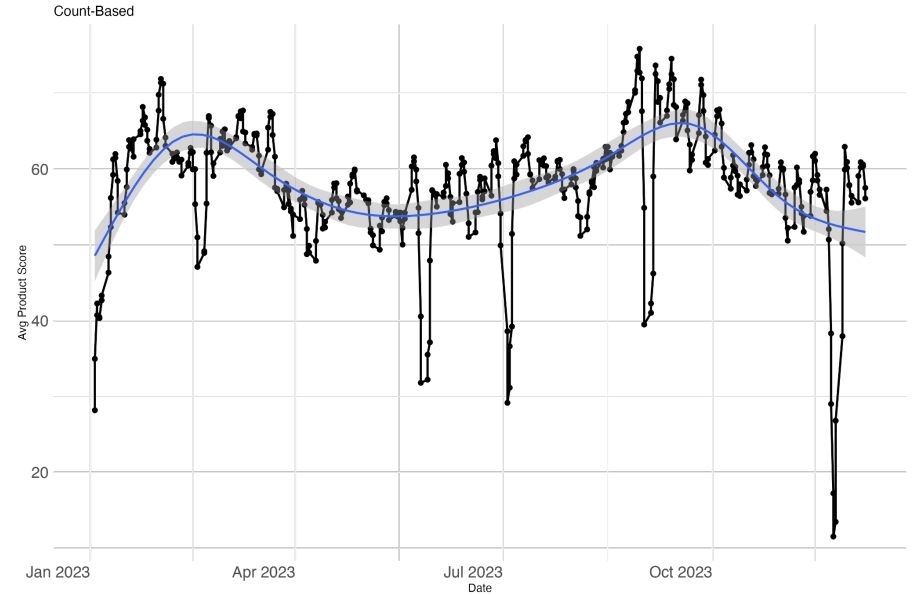
Productivity Trends in Count Based Activities "n" - similar trend to Time based activities except:
- Productivity drops sooner/earlier in the year in April
- Productivity returns to peak levels earlier than Time based activities by spiking in August and September

2023 Year Productivity Summary

1. Seasonal Productivity Patterns: The data suggests that there is a seasonal pattern to productivity with high productivity levels at the start of the year, followed by a dip around April/May. This could be associated with factors such as the end of the fiscal year, new year resolutions, or the onset of spring fatigue. It is interesting to note the difference in recovery between time-based and count-based activities, where count-based activities rebound by August and September, possibly indicating a quicker adjustment or different motivators impacting these activities.

2. Gradual Increase in Time-Based Productivity: In January, the numbers for time-based activities ("t") start modestly but show a significant increase towards the end of the month. This could imply that as routines are established following the holiday season, productivity in time-based activities tends to improve. Businesses might want to take this into account when setting deadlines or project timelines.

3. Mid-Week Productivity Spike: Examining the data points, there appears to be a trend of higher productivity scores in the middle of the week (around Wednesdays). This pattern could be due to a variety of reasons such as the mid-week push or the alignment of weekly targets.

4. Mild Resurgence in Count-Based Activities: After the initial peak, count-based activities ("n") appear to show a slight resurgence around late January. This suggests that even with a dip, there is potential for a quick recovery in these kinds of activities, which might be task-oriented or quantifiable in nature.

5. Variability Across Activities: There seems to be variability between time-based and count-based productivity, indicating that they may be influenced by different factors or represent different types of work. For instance, time-based work might involve more creative or strategic thinking that has a different rhythm compared to count-based tasks, which could be repetitive and easier to quantify.

2023 Productivity Role Comparison
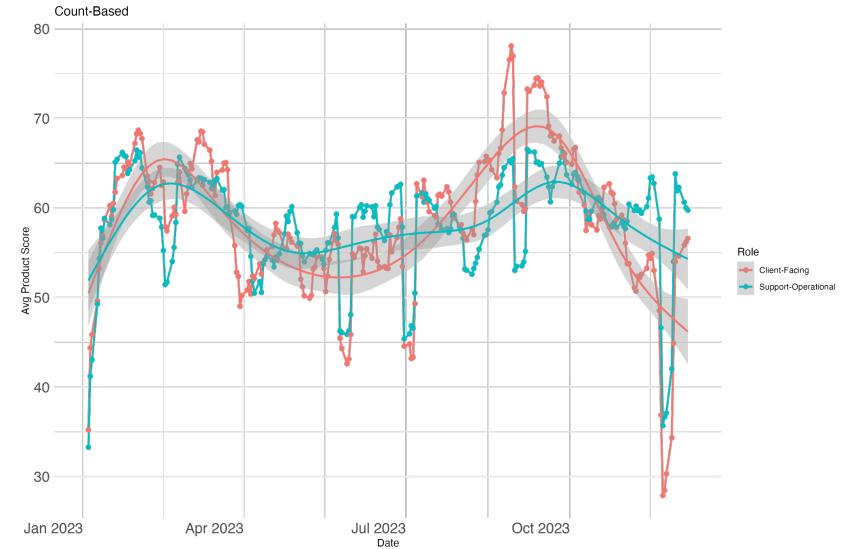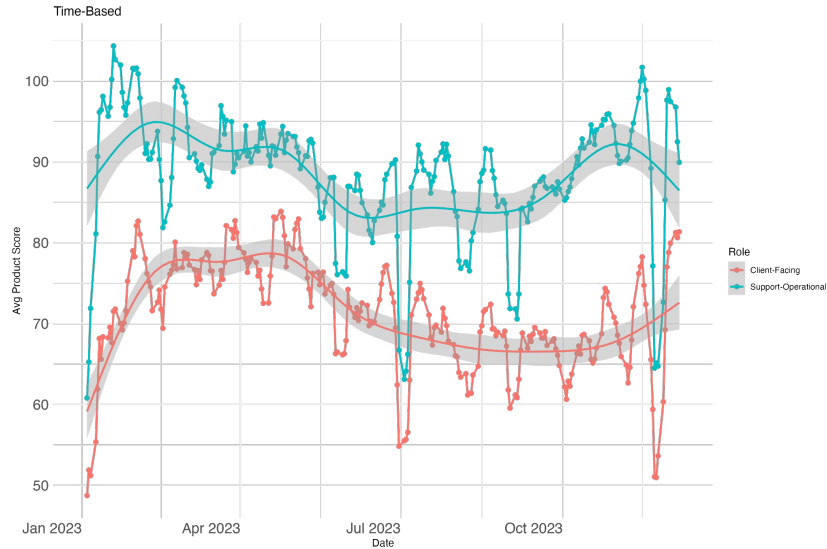
- Client Facing and Support Roles are similarly affected by seasonality/time of year during time based (eg. meetings) activities "t"
- Client Facing roles hit peak activity for time based activities "t" in Feb to May
- Activity "t" drops throughout the summer and doesn't return until to similar peak activity levels until October

T vs N

More Count based activity "n" completed at the start of the year possibly leads to a more steady time based activities "t" occurring throughout the year

- Client Facing Roles are more affected by seasonality/time of year than Customer Support Roles during count-based (eg. messaging/CRM) activities "n"
- Client Facing roles count based activity "n" spikes in late August right before labor Day weekend (due to kids back in school? Or wrapping up work before the long holiday weekend?)

2023 Year Productivity Summary by Role

Seasonal trends of client-facing and support-operational roles across different activities measured in time and counts:

1. Variability Over Time:

- Both client-facing and support-operational roles experience rises and falls in activity levels over time. Notably, there's a rising trend in activity for client-facing roles leading up to February with a peak around February to May, followed by a decrease during summer months.
- The start of the year seems to initiate with higher count-based activities, which may set a foundation for a more consistent level of time-based activities throughout the year.

2. Comparison of Roles:

- Client-facing roles show higher variability and sensitivity to seasonality when compared to support-operational roles, particularly for count-based activities. This suggests that client-facing roles may have more external influences (like customer demand) affecting workload.
- On the other hand, support-operational roles exhibit a more stable pattern of activity, with their time-based activities often remaining consistently higher than those of client-facing roles.

3. Notable Patterns:

- There's a noticeable spike in count-based activities for client-facing roles towards the end of August. This suggests a ramp-up in activity possibly in anticipation of the Labor Day weekend and the return of the school season.
- A pre-summer slump appears for client-facing roles when looking at count-based activities, possibly signaling a seasonal slowdown as people prepare for summer vacations and business decelerates.

4. High-Activity Points:

Support-operational roles manage to maintain a relatively high level of time-based activities, even exceeding client-facing roles on certain days. This could indicate a larger load of operational tasks that are less influenced by external business cycles.

5. Potential Predictors of Activity

Specific dates (e.g., holidays, start of the school year, end of fiscal quarters) seem to have implications on activity levels, especially for client-facing roles. Planning around these dates could be key for managing workforce expectations and resources.

Most/Least Productive Month

Time-Based

Avg Product Score

Month

Count-Based

Avg Product Score

Month
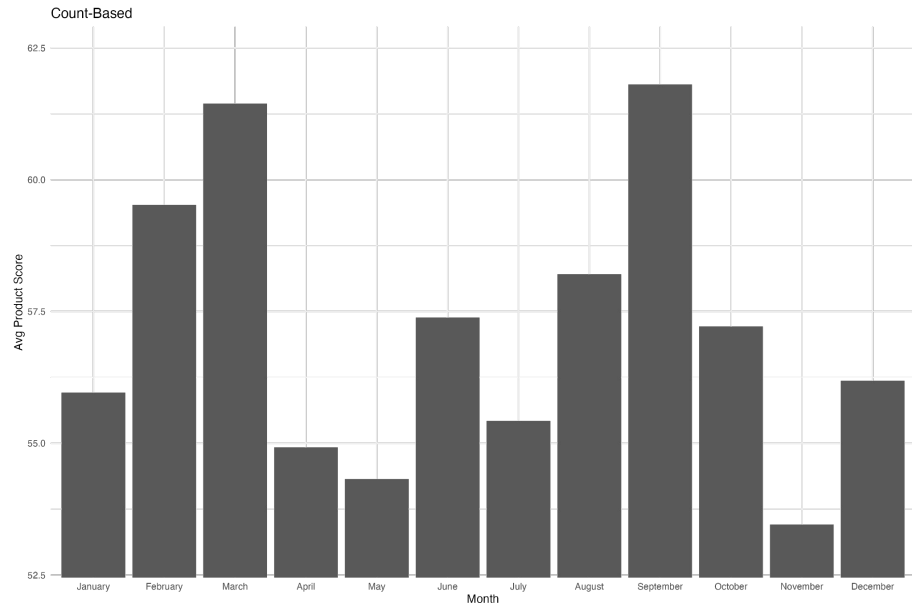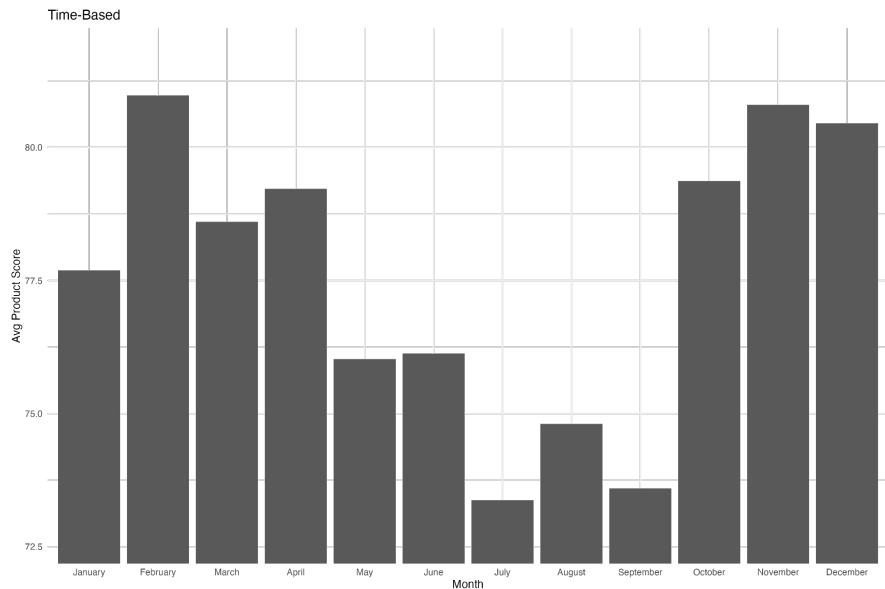
Time
Most Productive: February, November, and October
Least Productive: July, September, and August

*December is indicated as high but only consists
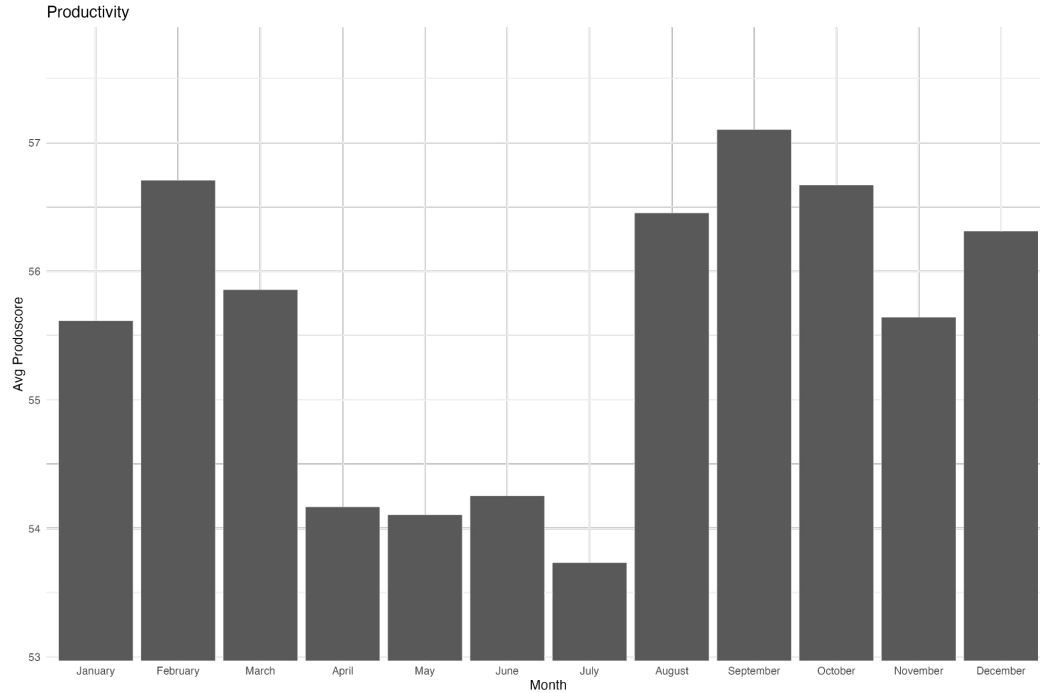of 6 working days

Count
Most Productive: September, March, and February
Least Productive: November, May, April

Most/Least Productive Month by Prodoscore

Productivity

Most Productive: September, February, and October

Least Productive: July, May, and April

*December is indicated as high but only consists of 6 working days

2023 Year Productivity Summary

Time

Most Productive Months: These months indicate a higher time investment in productivity, which could be related to end-of-year deadlines, new-year planning, or seasonal business activities affecting operational hours.
1. February
2. November
3. October

Least Productive Months: Lower productivity during these months could be due to typical vacation periods or other seasonal factors that impact working hours.
1. July (least productive)
2. September
3. August

Count

Most Productive Months: These figures suggest higher output or activity in terms of sheer volume during these months.
1. September
2. March
3. February

Least Productive Months: These months show a lower count of output or activities, which could indicate a decrease in demand, production, or operational activities
1. November
2. April
3. May

Notable Month Insights
- November is among the most productive months for time based activities yet is also among the least for count based activities. In contrast, September is among the least productive for time based activities, but among the most for count based activities.
- These patterns could reflect the nature of a set work structure and schedule, with count based tasks in September being a necessary step that leads to more time based work in November.

Most/Least Productive Month by Role
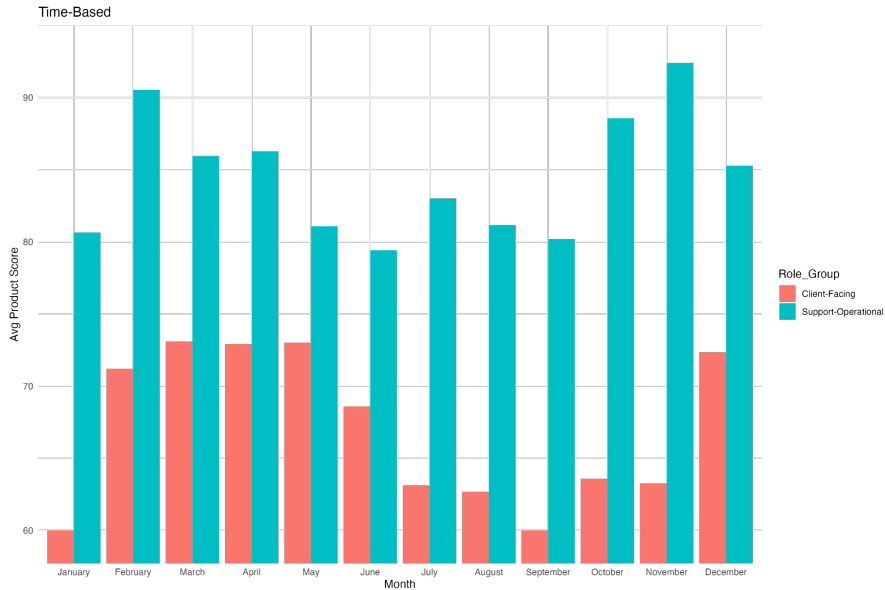
Time-Based
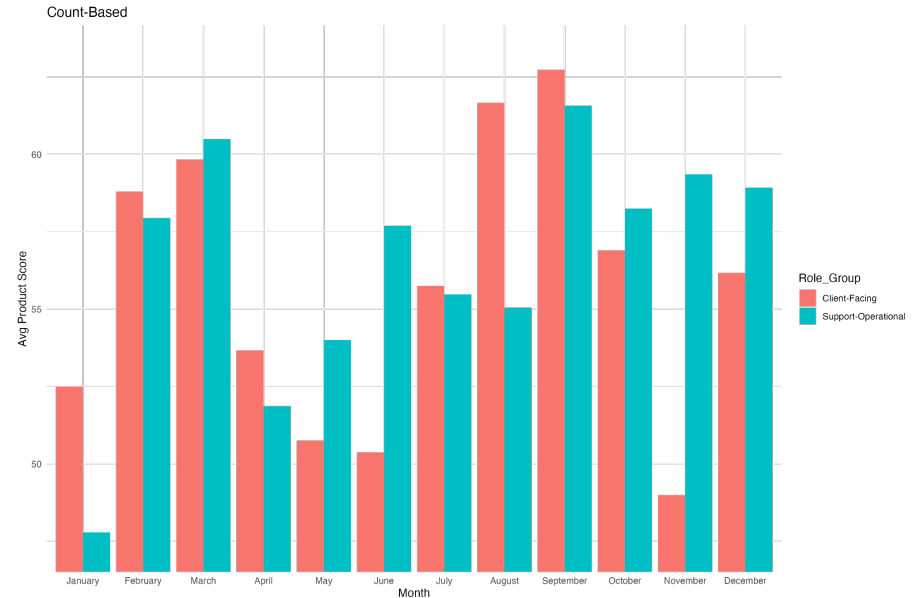
Count-Based

Time
Client Facing
Most Productive: March, April, May
Least Productive: January, September, and August

Support
Most Productive: February, November, and October
Least Productive: June, September, and January

Count
Customer Facing
Most Productive: September, August, and March
Least Productive: November, June, and May

Support
Most Productive: September, March, and November
Least Productive: January, April, and May

2023 Year Productivity Summary

Based on the data provided, we can analyze both "Client-Facing" and "Support-Operational" roles across different months with their total activities measured in counts (n) and time (t), respectively. Let's divide the insights into two categories:

Client-Facing Role

Most Productive in Counts (n):

1. September
2. August
3. March

Least Productive in Counts (n):

1. November
2. June
3. May

Most Productive in Time (t):

1. May
2. April
3. March

Least Productive in Time (t):

1. September
2. January
3. August

Support-Operational Role

Most Productive in Counts (n):

1. September
2. March
3. November

Least Productive in Counts (n):

1. January
2. April
3. May

Most Productive in Time (t):

1. November
2. February
3. October

Least Productive in Time (t):

1. June
2. September
3. January

Client-Facing Insights:

- March, April, and May are consistently appearing as the most productive months when productivity is measured in time.

- For counts, September and August are among the most productive, with a notable drop in productivity from May through November.

Support-Operational Insights

- September is the most productive month based on counts, whereas November is the most productive month in terms of time.

- For both counts and time, January tends to be one of the least productive months.

Notable Insight

- For the "Client-Facing" role in September: "Count" Activities are "Most Productive" and "Time" Activities it's "Least Productive." Suggesting that this time of year Count based activities take a much higher priority than other times of the year.
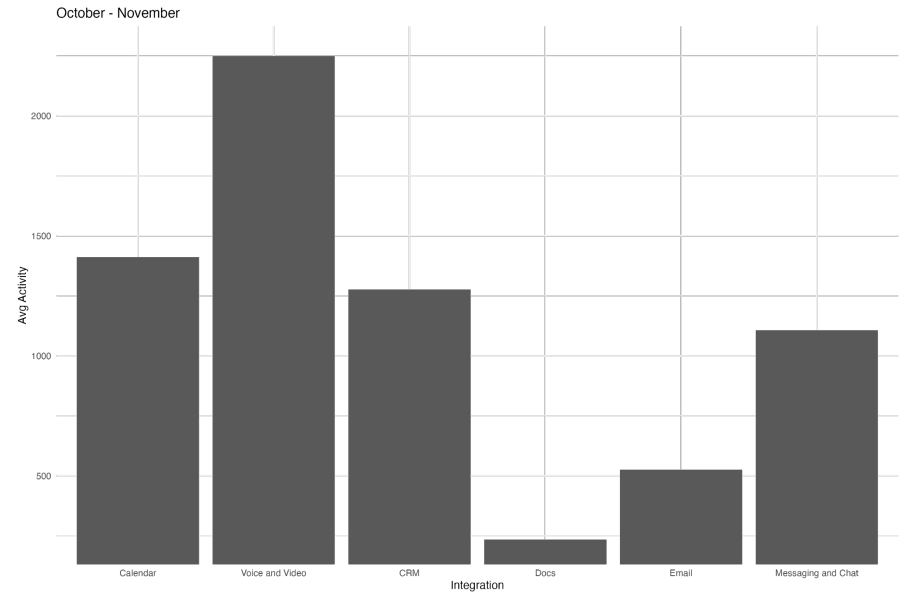
What Drives Productivity in Productive Months?

February - March

October - November
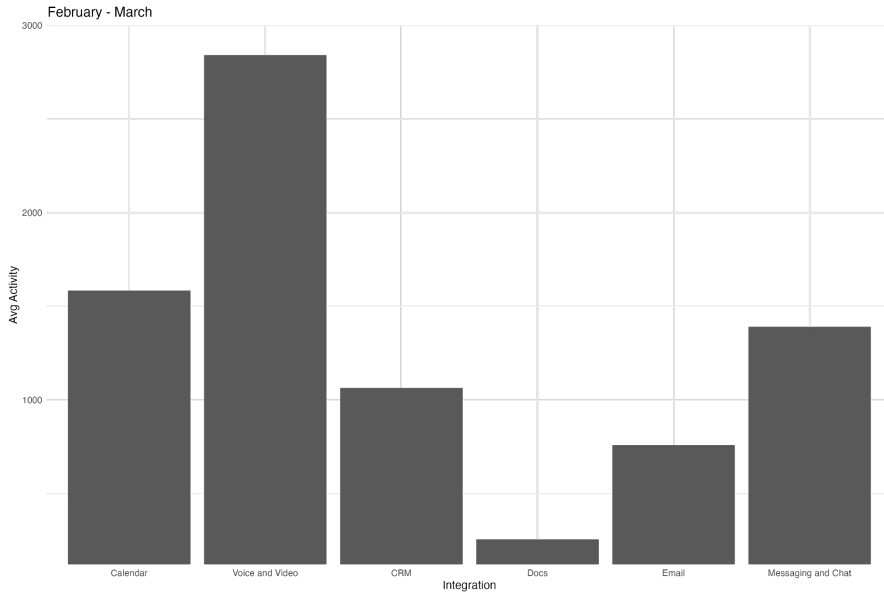
Spring (Feb/March)
Most Productive: Voice and Video, Calendar,
Messaging/Chat
Least Productive: Docs, Email, CRM

Fall (Oct/Nov)
Most Productive: Voice and Video, Calendar, CRM
Least Productive: Docs, Email, and Messaging/Chat

2023 Feb - March (Top 4)

1. Voice and Video scored the highest, suggesting that activities involving audio or video communication are dominant during February and March. This may include virtual meetings, video conferencing calls, and voice calls, reflecting a high level of collaboration or client interaction during these months.

2. Calendar had the second highest score. This could imply high scheduling demands, planning, or numerous meetings/appointments during this period. It might be a sign that people are organizing projects, deadlines, and tasks frequently through calendar tools.

3. Messaging and Chat activity is ranked third suggesting a continuous flow of quick, real-time communication among team members or with clients.

4. CRM (Customer Relationship Management): CRM activities have a significant score that reflects the importance of managing customer relationships, sales processes, and related tasks. This reflects an emphasis on customer engagement and sales activities that might be a key productivity driver during these months.

Overall, the data indicates that interactive and direct forms of communication (Voice and Video, Messaging and Chat) and organizational tasks (Calendar, CRM) are key drivers of productivity in February and March. Email and document handling, while still important, contribute less to the overall productivity score during this period. It would be important for businesses to ensure that the tools associated with these activities are well-supported and efficiently integrated into daily workflows to maintain or enhance productivity within these months.

2023 October - November (Top 4)

1. Voice and Video activities continue to lead in contributing to productivity. This indicates a sustained emphasis on verbal and visual communication in these months, likely reflecting ongoing meetings, presentations, and collaborations that take place through video conferencing tools.

2. Calendar: a high degree of scheduling and organizational tasks which might increase during these months, potentially due to the approaching end-of-year activities or planning for the next year.

3. CRM activities increased compared to previous months, possibly reflecting intensified customer interaction and sales efforts. This period may coincide with end-of-year sales initiatives, customer follow-ups, or efforts to meet annual targets.

4. Messaging and Chat activity dropped to 4th due to increased activity in CRM activity. The reliance on these tools remains significant, showing that real-time collaboration and discussion are crucial.

To summarize, during October and November, productivity seems to be driven primarily by verbal and visual communication with a maintained importance on organizational and client management tasks. Interestingly, CRM activities become more prominent than earlier in the year, indicating a potentially strategic focus on client interactions. Communication through messaging remains essential but to a lesser degree. These insights could guide businesses to optimize communication channels and focus on customer relationship strategies during these months.

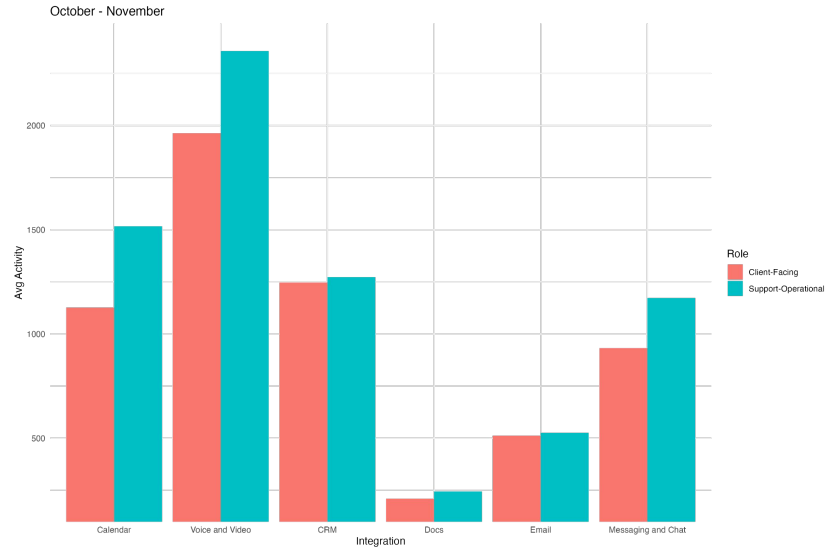# What Drives Productivity in Productive Months (By Role)?
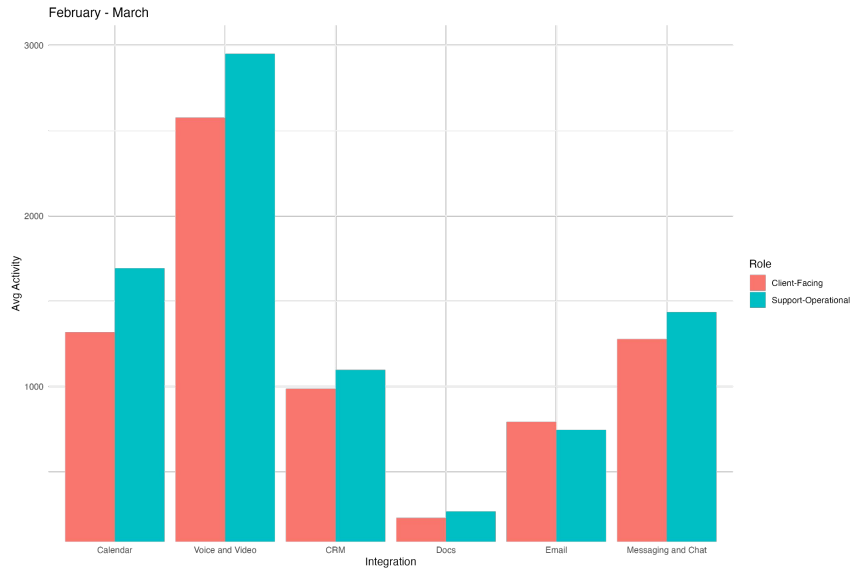
Spring (Feb/Mar)
Client Facing & Support
Most Productive: Voice and Video, Calendar
Least Productive: Docs and Email

Differences
Client Facing: More Email

Fall (Oct/Nov)
Customer Facing
Most Productive: Voice and Video, **CRM**

Support
Most Productive: Voice and Video, **Calendar**

Least Productive: Docs and Email

2023 Feb - March

Support-Operational Role Group

1. Voice and Video: Extremely high score (2950), highlighting a significant emphasis on communication through calls and video conferencing, suggesting a heavy focus on real-time collaboration and support.

2. Calendar: A high score of 1693.5 indicates extensive use of scheduling tools, which may involve coordination of support tasks, shift planning, or internal meetings.

3. Messaging and Chat: With a score of 1436, the reliance on instant messaging for quick internal communication remains important for day-to-day operations.

4. CRM (Customer Relationship Management): With a score of 1097.5, operational roles maintain a solid focus on managing customer interactions, support tickets, or operational data through CRM systems.

5. Email: A moderate score of 745.6 shows continual use of email for communication, albeit less than voice/video and calendar activities.

In summary, for both periods and role groups, interaction through Voice and Video is a major driver of productivity, with Support-Operational roles showing a particularly strong emphasis. Calendar management plays a critical role for both groups, highlighting the importance of organization and scheduling. CRM activities reflect the need for maintaining customer relations, with a stronger focus in the operational roles. Email is utilized significantly in both groups but more so in client-facing roles, aligning with their external communication needs.

Client-Facing Role Group

1. Voice and Video: High score (2576.3), but less than Support-Operational, suggesting that while client-facing roles also heavily utilize communication tools, there is comparatively less focus than in operational roles.

2. Calendar: The score of 1318.5 represents significant time spent on scheduling client meetings, sales calls, or managing project timelines, essential for client-facing responsibilities.

3. Messaging and Chat: A score of 1278 shows client-facing staff frequently engage in real-time interactions, whether with clients directly or for internal team coordination.

4. CRM: With a score of 986.5, CRM activities are important for maintaining relationships with clients, tracking interactions, and managing sales pipelines, although slightly lower than in the operational group.

5. Email: Email has a score of 792.5, indicating it is a key tool for communication with clients, used more extensively in client-facing roles than by the operational team.

2023 October - November

Support-Operational Role Group

1. Voice and Video: Highest score (2357.7416), indicating extensive use of communication tools for internal coordination, customer support, and operational discussions.

2. Calendar: High score (1516.7785) suggests significant scheduling and planning activities, possibly for resource allocation, service scheduling, or internal meetings.

3. Messaging and Chat: Score of 1172.9962 shows active use of instant messaging platforms for swift, intra-team communication.

4. CRM (Customer Relationship Management): Notable score (1273.1965), reflecting the importance of customer data management and possibly after-sales service tracking in operational roles.

5. Email: Lower score (525.8658) compared to other activities, indicating that while email communication remains relevant, it is not the primary tool for productivity.

6. Docs: Lowest score (244.1552), meaning document-related activities are not the main focus for the support-operations, which could hint at effective document management systems or lower need for documentation tasks.

Overall, for both role groups, communication through Voice and Video, and organizational tasks via Calendar, play significant roles in productivity. In Support-Operational, these are even more pronounced, while in Client-Facing roles, CRM also has a high impact, emphasizing the importance of maintaining customer relationships.

Client-Facing Role Group

1. Voice and Video: High score (1963.6387), but lower than Support-Operational, reflecting the importance of communication in customer interactions, sales calls, and consultations.

2. Calendar: Score (1126.7108) implies less scheduling activity compared to support roles, yet still significant for arranging client meetings and managing deadlines.

3. Messaging and Chat: Score of 932.1355 points to the reliance on real-time communication tools for discussions with clients or coordination with sales teams.

4. CRM: The score (1247.8311) is slightly less than in Support but still high, underlining customer relationship management as a central aspect of client-facing work, potentially related to lead tracking, sales pipelines, and account management.

5. Email: Similar to Support-Operational, the score (512.0344) shows that email is used less intensively than other forms of communication in client-facing roles.

6. Docs: The lowest score (209.1060), consistent with Support roles, suggests a secondary role for document handling relative to other activities, which may reflect a focus on verbal and digital communication and customer relations over paperwork.

2023 October - November

Support-Operational Role Group

1. Voice and Video: Highest score (2357.7), indicating extensive use of communication tools for internal coordination, customer support, and operational discussions.

2. Calendar: High score (1516.8) suggests significant scheduling and planning activities, possibly for resource allocation, service scheduling, or internal meetings.

3. Messaging and Chat: Score of 1173.0 shows active use of instant messaging platforms for swift, intra-team communication.

4. CRM (Customer Relationship Management): Notable score (1273.2), reflecting the importance of customer data management and possibly after-sales service tracking in operational roles.

Overall, for both role groups, communication through Voice and Video, and organizational tasks via Calendar, play significant roles in productivity. In Support-Operational, these are even more pronounced, while in Client-Facing roles, CRM also has a high impact, emphasizing the importance of maintaining customer relationships.

Client-Facing Role Group

1. Voice and Video: High score (1963.6), but lower than Support-Operational, reflecting the importance of communication in customer interactions, sales calls, and consultations.

2. Calendar: Score (1126.7) implies less scheduling activity compared to support roles, yet still significant for arranging client meetings and managing deadlines.

3. Messaging and Chat: Score of 932.1 points to the reliance on real-time communication tools for discussions with clients or coordination with sales teams.

4. CRM: The score (1247.8) is slightly less than in Support but still high, underlining customer relationship management as a central aspect of client-facing work, potentially related to lead tracking, sales pipelines, and account management.

Are employees at smaller orgs more productive?
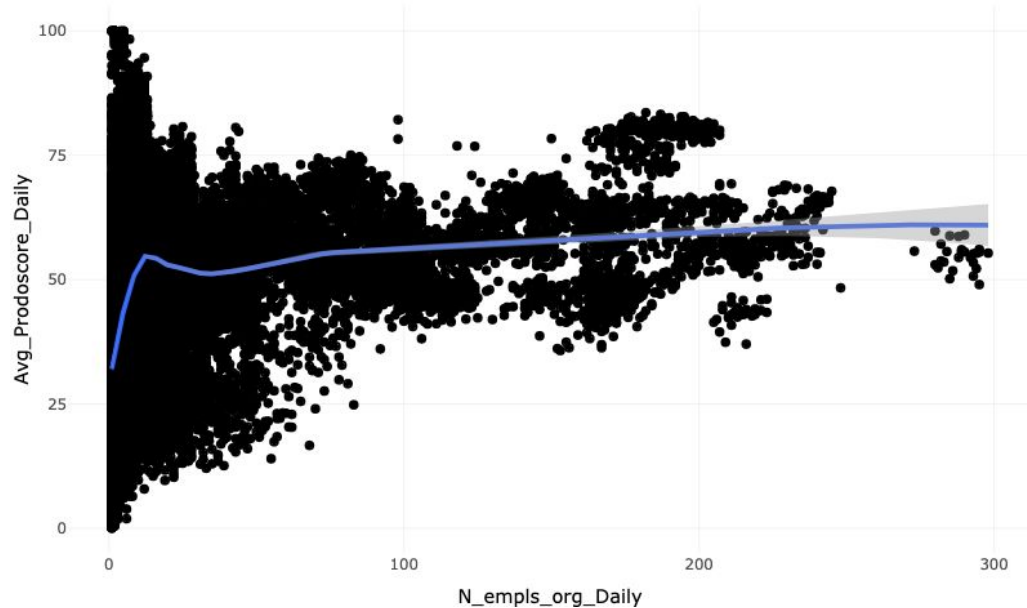
The analysis found that as the number of employees in an organization increases, the average productivity score also tends to increase. This suggests that larger organizations may, on average, have more productive employees. However, these results are averages and may not apply to every individual organization.

Meetings Across Months
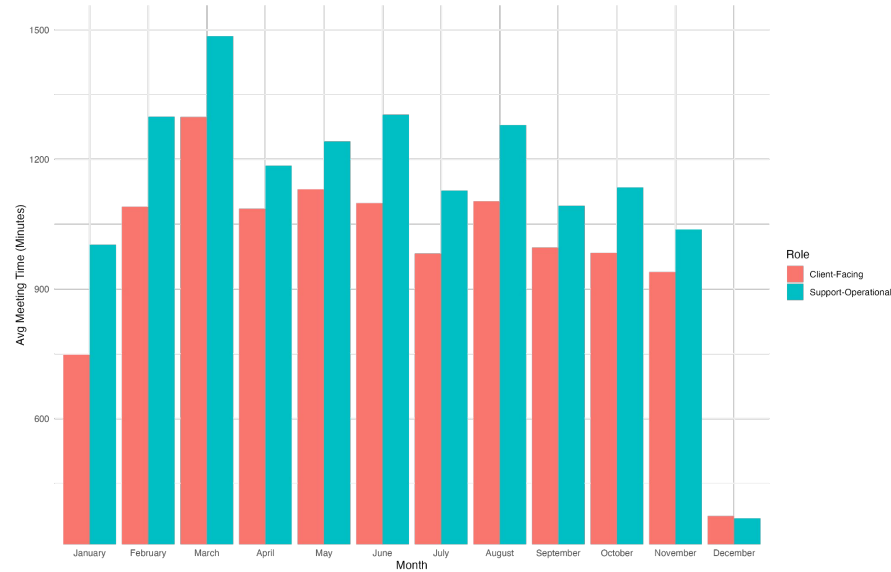
Time

Client Facing
Most Productive: March, April, May
Least Productive: January, September, and August

Support
Most Productive: February, November, and October
Least Productive: June, May, and September

Count

Customer Facing
Most Productive: September, August, and March
Least Productive: November, June, and May

Support
Most Productive: September, March, and November
Least Productive: January, April, and May

Meetings Across Months

1. Seasonality and Trends:

- Both Role Groups, Client-Facing and Support-Operational, show a trend where Product Score and Monthly Meeting Costs tend to increase from January through to March.
- There is also a notable dip in both Product Score and Monthly Meeting Costs for both Role Groups in December, which could be attributed to the holiday season where fewer meetings are likely to take place.

2. Comparing Role Groups: The Support-Operational group consistently has a higher Product Score and thus higher Monthly Meeting Costs compared to the Client-Facing group across almost all months, indicating that they are spending more time in meetings.

3. Monthly Variability: Both Product Score and Monthly Meeting Costs generally fluctuate month-to-month, with some months showing a sharp increase (for example, March for both groups) or a decrease (such as April for both groups). This could indicate changes in business focus, project cycles, or operational needs driving the number of meetings.

4. Peak Meeting Activity:

- For the Support-Operational group, the peak meeting activity seems to be in March, with the highest Product Score of 1485.4 and Monthly Meeting Costs of $1,071.21 on average, per employee, given a $90,000 annual salary.
- For the Client-Facing group, March is also a peak month, albeit a bit lower in both metrics than the Support-Operational group, with an average Monthly Meeting Costs of $936.33, on average, per employee, given a $90,000 annual salary.

5. Operational Considerations: It is noteworthy to consider what operational or business events correlate with the peaks and troughs in meeting activities. For instance, the end-of-quarter or end-of-financial-year activities could explain increases in meetings during certain months.
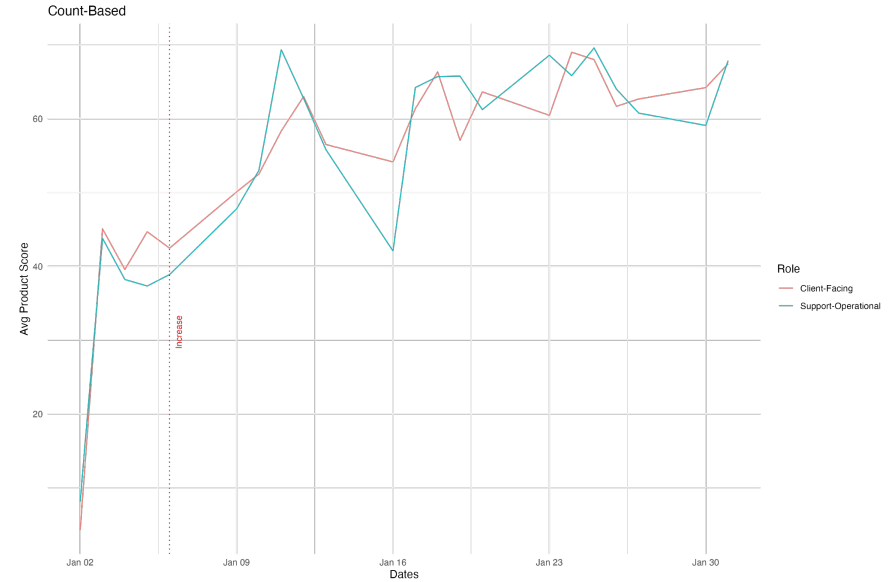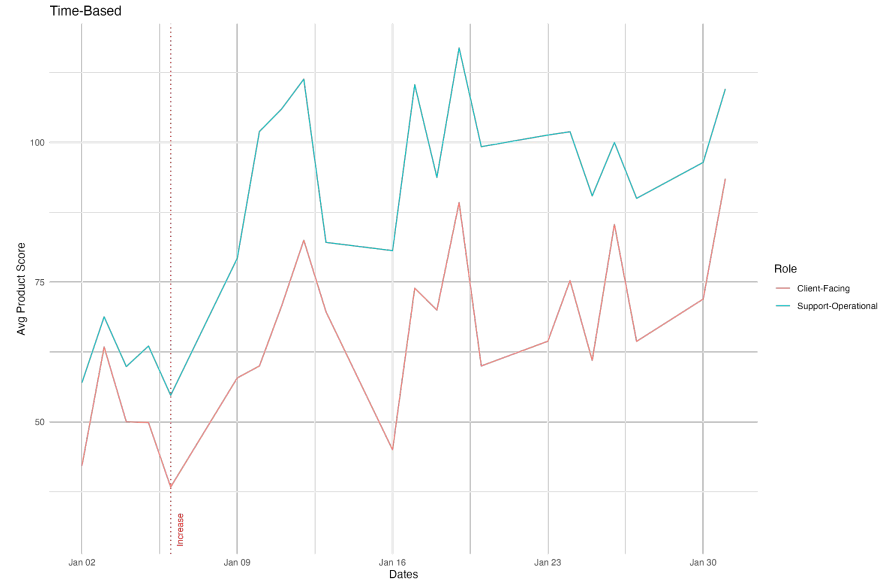
2023 January Role Comparison & Insights

Overall Productivity Trends

1. Increased Productivity Over Time: There is a noticeable increase in productivity scores for both Client-Facing and Support-Operational roles as the month progresses. For example, count based Product Score for Client-Facing roles increased from 4.31 on January 2nd to 67.43 on January 31st, while for Support-Operational roles it increased from 8.14 to 67.86.

2. Time-based Scores show higher variability: The time-based productivity measurements have larger swings than the count-based measures, indicating that there might be more variability in how time is being utilized day-to-day. For instance, Support-Operational roles started at 57.00 and peaked at 116.92 on January 19th but also had lower scores like 54.75 on January 6th. Client-Facing roles had a minimum of 38.33 on January 6th suggesting a potential area for investigation.

3. Support-Operational seems to utilize time better: In general, Support-Operational roles seem to have higher time-based Product Score normalized values compared to the Client-Facing group. This could suggest that operational support work is more consistent or has procedures that may aid in productivity.

Role Group Productivity Comparison

1. Support-Operational outpaces Client-Facing in count based scores initially: At the beginning of the month, Support-Operational roles outperform Client-Facing roles in count-based productivity. This trend reverses later in the month where Client-Facing roles seem to catch up and occasionally surpass Support-Operational roles.

2. Support-Operational maintains lead in time-based scores: Throughout January, Support-Operational roles usually exhibit higher time-based productivity scores. This could indicate that these roles have more effective time management strategies or possibly different workloads.

Notable Insights

1. Mid-Month Increase: Starting after January 6th, there is a significant rise in productivity scores for Support-Operational roles in both count and time based activities, which could be indicative of a post-holiday ramp-up in work efficiency.

2. Consistent Improvement for Client-Facing: The scores for Client-Facing increase fairly steadily throughout the month, which may show that after a slower start at the beginning of the year, these teams may have implemented strategies or adjustments that improved their productivity.

Conclusion

January's productivity data shows a promising trend of improvement across the month. While there are clear gains, understanding the root causes of variability, especially in time-based productivity, could help inform better practice and policy. Sharing successful strategies across roles could lead to increased overall productivity. It is important to carry these insights forward into future months to maintain and improve productivity gains observed in January.

Productivity Decreases in November
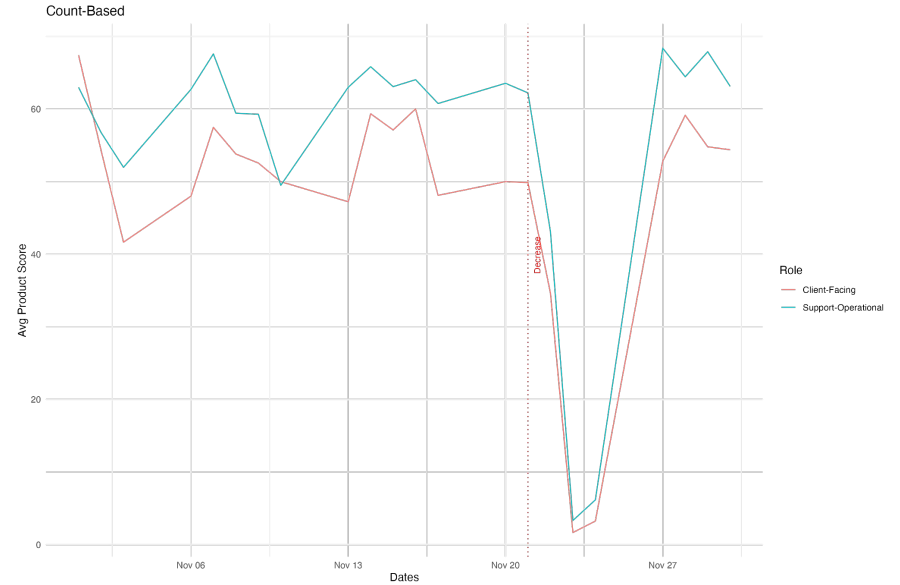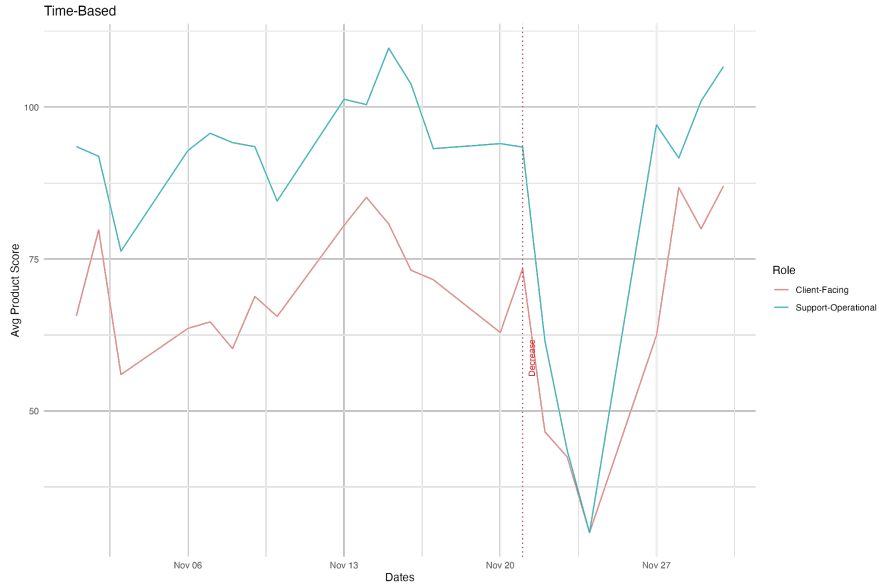
2023 November Role Comparison & Insights

Overall Productivity Trends

1. Fluctuating Productivity: Both Client-Facing and Support-Operational roles show fluctuation in productivity across the month. This could indicate a response to project cycles, external events, or internal workflow changes.

2. Notable Drop Towards the Month's End: There is an evident decrease in productivity for both count and time based activities towards the end of the month, specifically after November 21st. This drop is significantly pronounced on November 23rd and 24th for both Role Groups, suggesting a possible external factor affecting work, such as a holiday.

3. Recovery After Drop: Post the notable drops on 23rd and 24th, productivity levels seem to recover for the last week of the month, particularly for the Support-Operational roles in time based activities, and more modestly for the Client-Facing roles.

Role Group Productivity Comparison

1. Support-Operations Generally Higher in time activities: For most of the month, the Support-Operational group consistently registers higher productivity scores in time-based activities, indicating a better utilization of time or perhaps more time-bound tasks.

2. Client-Facing Scores More Variable: Scores for Client-Facing roles fluctuate more markedly throughout the month. This variability could be due to the nature of client interactions, which may be less predictable and more reactive.

Notable Insights

1. Start of Month Scores: On November 1st, both role groups started with relatively high scores compared to the rest of the month, indicating a strong beginning.

2. Mid-Month Consistency: From November 6th through 16th, both groups maintained a relatively consistent level of productivity, with Support-Operational roles showing time-based scores above 90 in t munits and the Client-Facing group maintaining a steady score range in n munits.

3. Pre-Holiday Decline: It is possible there was a decline in productivity just before a potential holiday, as seen in the very low scores on the 23rd, the day before Thanksgiving.

Conclusion

November's productivity data illustrates a pattern of initial high performance, followed by mid-month consistency, and a sharp drop toward the end of the month, which coincided with the Thanksgiving holiday period, with a recovery observed in the following days. Overall, Support-Operational roles maintained a higher level of time-based productivity while Client-Facing roles experienced greater variability. Identifying root causes for periodic fluctuations and significant dips can help in smoothing out productivity throughout the month and preparing for expected downtimes during holiday seasons.