Virtual Productivity in Today's Climate

Managing Virtual Productivity

Since the spread of the coronavirus disease (COVID-19), businesses across the higher education and nonprofit industries have rapidly transitioned their workforce to a virtual environment. Given the unforeseen circumstances of this pandemic, the transition has been challenging for many institutions as they were unprepared and unequipped to manage their entire enterprise in a virtual setting.

Most institutions have worked to build a positive virtual culture and team spirit through video conferencing, established "virtual team spaces", and even virtual happy hours. However, measuring employee productivity in a virtual environment remains a challenge for many managers/supervisors. Prior to the hugely disruptive events surrounding COVID-19, physical presence in the office was one of the standard measurements of productivity. To ensure that organizations can continue to achieve their missions and business goals, higher education and nonprofit institutions should consider defining and implementing productivity metrics (also known as performance metrics or performance indicators).

Defining and Measuring Impact

Developing productivity metrics may feel uncomfortable. Across the higher education and nonprofit industries, all roles contribute so much more than the tasks that they complete. However, performance indicators help both the institution to ensure they can continue to operate and the staff who may be struggling to determine how to perform successfully in this new, virtual environment.

Define the Right Team

As a first step, institutions should thoughtfully define which roles should be involved in reviewing, updating, and defining performance metrics. There is no "one size fits all" solution, but it is recommended to include some representation from human resources in each review.

Review Team Job Descriptions

Once you have your team assembled, review the job descriptions for the area under discussion. If the job descriptions have not been updated recently, they may not align with the actual responsibilities of the roles, and will not position you to effectively define useful performance metrics. If needed, complete the exercise of updating these job descriptions to accurately reflect institutional needs.

Develop Measurable Metrics

Working from each of the responsibilities noted in the job description, define measurable indicators that can be used to track productivity and impact. Metrics will (and should) vary widely based on the role and the available data. These definitions should change over time to support an institution's mission and business needs.

For client-facing roles, both internal and external, metrics could include time to respond, number of tickets resolved, number of inquiries responded, or number of potential students converted. For administrative roles, metrics could include the number of journals processed and uploaded, number of expense reports approved for payment, number of financial reports submitted, number or amount of invoices submitted or received for payment. For management roles, metrics should be directly tied to the achievement of business or strategic goals, as defined by institutional leadership.

Once metrics are identified, determine how to gather this data and how often managers should report status. Whenever possible, tie the metrics to data within an institutional system. This will ensure that measurements are standardized and should ease the burden of gathering and analyzing performance information.

Implement the Performance Measurements

Once new metrics are developed and vetted, introduce the indicators to managers and staff. This will likely present (another) significant change to their daily work life, so providing adequate communications, training, engagement, and leadership support will be critical to ensuring the institution implements the metrics successfully. Further, it is essential to provide adequate training and guidance to managers on how to implement the measurements and to communicate with their staff. Embed sufficient communications and feedback loops to ensure a transparent rollout to staff.

Additionally, remember that performance measurements are not set in stone. They should tie back to the institution's mission and business needs, which continuously adapt and adjust to external market pressures. Managers and leadership should review these indicators at least annually, or more frequently in the face of major disruptions.
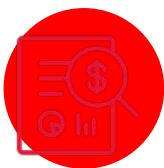
Compare Institutional Business Needs with the Shared Service Model

As a sub-set of the performance measurement conversation, institutions should consider whether a shared service model could better meet business needs. Shared services typically reduce administrative expenses while increasing an institution's ability to consistently meet its business needs in a standardized manner, reducing compliance, audit, and financial risk. This evaluation requires analysis above-and-beyond the development of performance metrics tied to a specific role and should be implemented only after thoughtful consideration and planning.