# INSPIR METER
### INSPIROMETER
### excite insight

## Customising how Outlook uploads your data
### ... techniques to increase the usefulness of your meeting stats

## Introduction: Why is meeting data important?

Meetings are necessary to progress virtually all aspects of business, and time needs to be allocated to enable them to do this. However, where meetings are ineffective, or inefficient, progress still needs to be made, and so meetings extend in time and number until the required progress is delivered. Thus, the time consumed by meetings is often an indicator of their ineffectiveness, and the time saved by making them more effective is both a sign of progress and a key contribution to productivity.

But to manage these gains effectively, meeting data needs to be complete and accurate. If you follow typical Outlook conventions this will happen automatically, but some Outlook practices can cause problems with the initial data. Thankfully these are easily adjusted for within Inspirometer, and this brief guide shows you how.

## How do we get a complete picture?

Calendars are a valuable source of meeting data, and this data is remarkably easy to collate by means of the Inspirometer calendar add-in, providing a picture of meeting time at both the individual and the organisational level.

The add-in saves the many hours of effort required to collect data by manual means. It automatically analyses calendar data in the background, and then maintains this on a daily basis.

However, ensuring a complete picture does require that people record their meetings in their calendars – but fortunately, with modern calendar practices, this is no longer a big issue.



## How do we get an accurate picture?

While calendars contain both meeting and appointment data, they do differentiate between the two. Typically, calendars refer to events where no-one else is invited as appointments, and events where others have been invited (or to which you have been invited by others) as meetings. You can see this in the window header when you open up items in Outlook.

For the most part, this is sufficient to develop a reasonably accurate picture of meeting time expenditure. However, there are a number of calendar practices which can undermine the accuracy of the data gathered in this way. While some of the following may appear strange at first glance, all we can say is that it is surprising what has evolved as a result of expediency in various organisations.

# What are the main issues in data accuracy?

Practices which can undermine your data accuracy include:

■ Inviting your boss to your holiday – this turns vacation placeholders into very long meetings
■ Creating appointments to reference meetings which others are holding, but have not sent through a calendar invite
■ Accepting meeting invitations which you do not attend
■ Not accepting meeting invitations which you do attend
■ Holding meetings which you have not calendarised

These practices will cause things that are not (your) meetings to inflate your statistics and fail to capture data for some things that are meetings. Fortunately, these are very easy things to spot and correct if you are mindful of the issues, and if you take the time to compare your calendar, your meeting stats, and what actually happened.

# Reviewing your meeting data



Your meeting data can be found on the 'Analysis > Meeting Stats' page (using the left-hand menu) at https://my.inspirometer.com (see the image on the right).
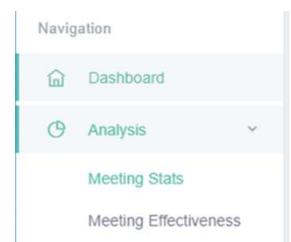
The various charts and donuts will present you with an analysis of the composition of your meetings:

■ The balance between internal and external meetings – how much time are we spending with our customers?
■ The proportion of your meetings that are held virtually
■ The degree to which your meetings are recurring meetings
■ To what extent your meetings have objectives and agenda defined
■ How much of your time is taken up in travel
■ And, overall, what proportion of your time is taken up in hosting or attending meetings

Charts tend to use two colours – blue for meetings you are hosting (where you have sent out the meeting invitation) and green for those meetings you have attended (which someone else has organised).



Many of the charts are of the donut type, and show the proportion of meetings that fall into different groups (based on size, length, type etc.). Hovering over (on a PC) or tapping (on a tablet/phone) segments in these charts will provide more information on each piece of data, and so you can fairly quickly get to grips with what your meeting
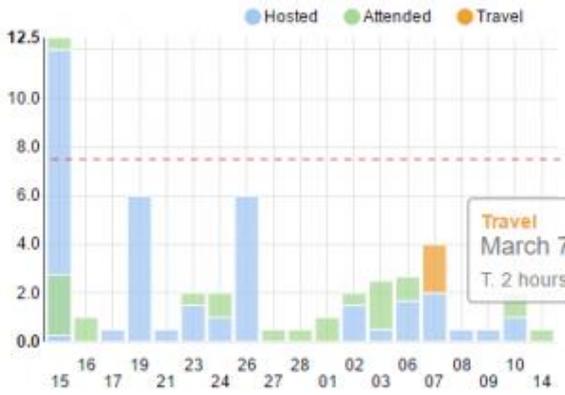
stats are showing you. There are also (i) Information symbols liberally distributed on the page so that you can see what some of the other numbers mean.

The histogram in the top left corner of your dashboard shows you (for the days where there is data) the proportion of time you spent hosting, attending and traveling to meetings.

Use this to compare with your calendar, and with your recollection of what actually happened.

Print out the calendar, and the meeting stats page on paper, and highlight any discrepancies with reality, then work through these to identify why they are appearing incorrectly (look particularly at your calendar, and whether everything appears as it should …

- Accept the meetings you attended, delete the meetings you did not.
- Look at the physical meetings you have scheduled and, if any of these involve travel, include appointments for the times of that travel and give them a subject beginning with the text Travel:
- Ensure that any meeting location on-site uses the label for the meeting room from the 'Rooms' button in the meeting organiser – this will help improve these facilities for future use
- Ensure that any virtual meetings clearly include the name of the virtual meeting tool being used in the location field
- Only invite people who are likely to attend the meeting, and who will contribute and/or benefit in regard to its value-add
- Label holiday to which you have 'invited' people in your calendar to include the word 'holiday' in the subject line (this will cause the calendar add-in to ignore it)
- Label appointments which reflect meetings for which you did not receive an invite to include the word 'meeting' in the subject line (this will cause the calendar add-in to include it)

Once you have done this for the items already scheduled into your calendar, you will find it very easy, almost effortless, to maintain these disciplines for whenever you add new things into your calendar.

# Tailoring the 'trigger' words to your needs

If for some reason, the words used above cause a problem for you, for instance, where your calendar is in a different language or you use different terms, you can adjust the words that the add-in searches for to include, exclude, or disregard data, you can do this on the settings panel, which you can access via the Inspirometer button(s) that appear on your calendar ribbon.

The image on the right shows an example from Outlook 2016 – simply click the Inspirometer button on the ribbon, and then the option for opening the settings, and this will open a panel like the one illustrated on the next page.
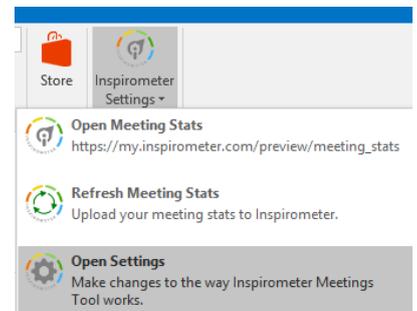
## Inspirometer Meetings Tool Settings
Version 2.0.1.8

### Feedback Options
Turn on feedback options to configure what feedback meeting recipients are asked to give.

☑ Show Feedback Options

Use feedback options from
○ My settings
◉ My organization's settings

### meetings@inspirometer.com
When this is enabled, meetings@inspirometer.com will automatically be added to new meetings you create.

☑ Enable meetings@inspirometer.com

### Vacation identifiers:
Meetings with a subject beginning with a vaction identifier will not appear in your data.

Holiday, Vacation, Leave

### Privacy identifiers:
Meetings with a subject beginning with a privacy identifier will have their subject and number of recipients removed from the data upload.

Private:, Strictly Confidential:

### Travel identifiers:
Appointments beginning with a travel identifier will be uploaded as travel data.

Travel:

### Other meeting identifiers:
Appointments beginning with an other meeting identifier will be treated like a regular meeting.

Meeting:

### Virtual meeting identifiers:
Meetings with the location set to a virtual meeting identifier will be flagged as a virtual meeting in your data.

Skype Meeting, Live Meeting, Circuit, Phone

Save Settings

The settings panel enables you to change the words or phrases that the add-in searches for, and make them relevant to your actual situation.

So, for instance, if you use the word 'break' or the phrase 'annual leave' to signify a holiday, you can add it to the list of Vacation Identifiers, separating it from other words or phrases on the list with a comma.

However, before you edit these identifiers, please be mindful that any subject with the word 'break' in the subject line will be treated as a holiday, so you need to select words which you use uniquely in the subject line of holidays.

As an example of this, I use the word 'travel' in calendar placeholders which reserve travel time for my meetings, but I also have meetings to discuss travel. To differentiate between the two, I always put a colon after the word travel in my placeholders, such as 'Travel: to Manchester'.

As you can see on the left, you can also change the identifiers Inspirometer uses to identify data which is relevant to: virtual and digital meetings; meetings which you have put in as an appointment because you have not received a calendar invite; and also those meetings where you wish to keep the title or subject matter confidential.

You do not need to get preoccupied with these identifiers, but it is worth knowing that altering them is an option if you find that meetings are being incorrectly handled within your data.
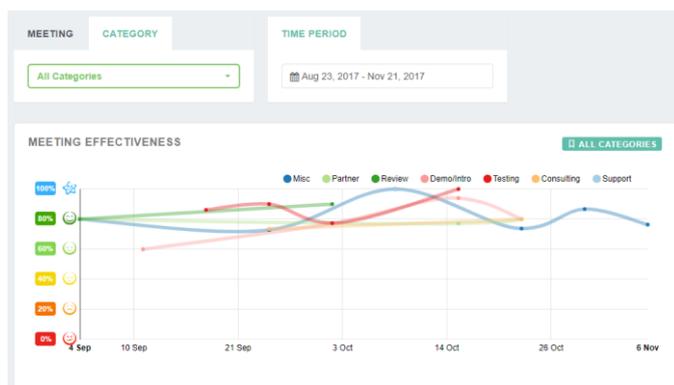
If you do change your Identifiers, please remember to click 'Save Settings' at the bottom of the panel.

# Categorising different types of meetings

Outlook provides for categorising items such as meetings and appointments. This has the benefit of both making your calendar more colourful, and of being able to

see more quickly the different types of meetings you have scheduled.

With Inspirometer, it provides the additional advantage of being able to see patterns of meeting effectiveness across different types of meetings – as you can see in the graph on the left (Analysis > Meeting Effectiveness, and then click the Category tab).
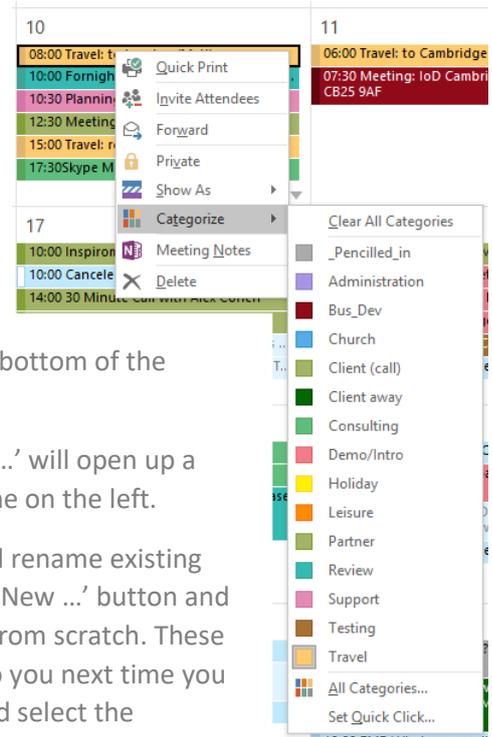
By selecting a specific category within the Category tab, you can then see a further breakdown of the spread of feedback, comments and statistics for that category.

It is not necessary to use categories to analyse your meetings, but it is a useful option, and it is easy to do. Simply right click an existing meeting in your calendar, select categorize, and then select the category to allocate (see the illustration on the right).

When you first do this you may notice that either you don't have any categories, or that they are not meaningful to you. You can remedy this easily by selecting the 'All Categories …' option at the end of the second menu (see the last but one title at the bottom of the picture on the right).

Clicking 'All Categories …' will open up a dialogue box like the one on the left.

Here you can select and rename existing categories, or click the 'New …' button and create new categories from scratch. These will then be available to you next time you right click a meeting and select the Categorize option.
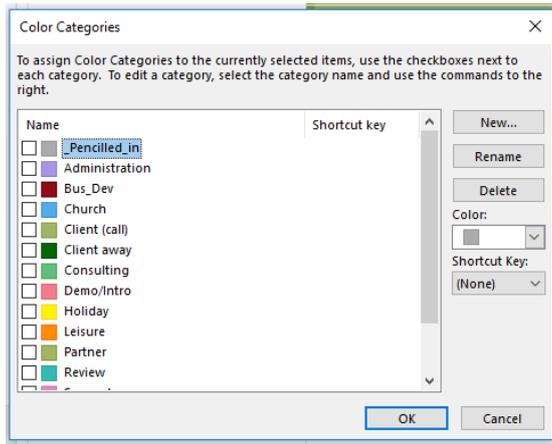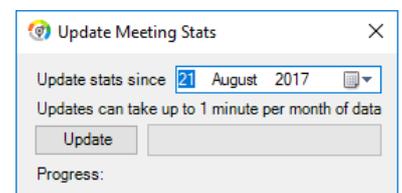
# Updating your changes to Inspirometer
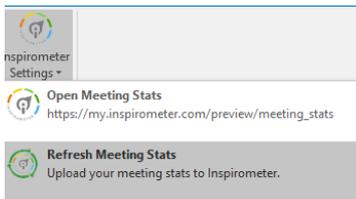
To ensure that changes made within your calendar are updated to Inspirometer, you will need to refresh your Meeting Stats within Inspirometer. This is a very easy thing to do. Simply click on the Inspirometer button and click 'Refresh Meeting Stats' (In Outlook 2007, this is a separate button, not a menu item).

This will open a dialogue box, where you can select the earliest date for the changes you have made and then click the 'update' button.

You can see the results of your changes within Inspirometer, and make further changes there if you require. The next section explains how.

# Reviewing your meetings list within Inspirometer

To see the complete list of the meetings on which Inspirometer is basing its analysis, simply click on 'Manage My Data' in the left-hand menu of your Inspirometer account.

This will open up a table like the one shown below. To ensure you see all of the data, check the box for 'Show excluded' against the time period, and this will enable you to see the calendar data that Inspirometer has excluded from your analysis, and provide you with the option to reinclude it.



You can also change the time period in this panel to ensure you see a list of the meetings for the period you are actually interested in. Please bear in mind however, that the list may run to several pages, and that you may need to click through these using the tools at the bottom of the page.

You can narrow down the list by using the Search facility, and show additional columns using the buttons to the right of the Search facility (both of these can be found to the top right of the displayed list of meetings).

To include or exclude an item from the analysis, click the drop-down arrow on the coloured 'Type' box to the left of the item, and select an alternative type ('Holiday' and 'Removed' items do not show in the analysis). To avoid the tedium of doing this individually for multiple items, simply check the boxes in the left-hand margin against all of the items you wish to change, and then click the Bulk Edit button in the top right.

There is an option to change or add a category to meetings in the 'Manage My Data' section. This is particularly useful if you wish to group a small selection of meetings together for the purpose of graphing trends or other analysis.

## How did we do?