Remote Work Planning Webinar
Key Lessons

Presented by:

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Today's Presenter

Jessica Cryer, Managing Partner

Jessica is a sharp and experienced Customer Experience leader who has a passion for helping businesses create, design, build, and execute strategies that will make a tangible difference.

Jessica is responsible for managing a Customer P&L and leading a team in identifying, developing, and executing customer and category growth opportunities through the use of relevant and personalized marketing and sales strategies.

Jessica also plays an integral role in leading training and consulting initiatives that reshape customer-centric thinking and management
across organizations.

ABOUT CSPN

We **Design** Memorable Learning Experiences and **Empower** People to Deliver Them

CSPN is a leading provider of learning and development solutions, consulting services and networking opportunities designed to empower organizations and employees to harness the competitive advantage of delivering exceptional customer experience.

Definitions: Working Differently

Where
- Working remotely
- Predominantly from home

When
- Adjusting schedules to accommodate team members
- Considerations for home & client situations

How
- Adopting technology solutions to enable seamless collaboration and teaming

How Much
- Flexing to meet fluctuating business and personal requirements

Changing the location of **where** teams get work done can impact **how** and **when** they work – and so working differently takes these considerations into account.

# Don't Try To Replicate Your Office Environment

Location independence may seem like freedom,
but in reality it requires keenly developed soft skills.

- Communication

- Self-Direction

- Trustworthiness

- Discipline

- Initiative
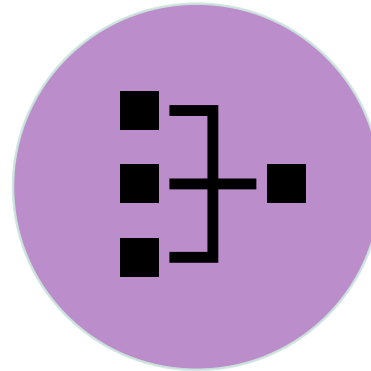
- Flexibility

- Self-Efficacy

Short- Term Remote Work Considerations

It's not about long-term strategy, it's about immediate short-term implementation.
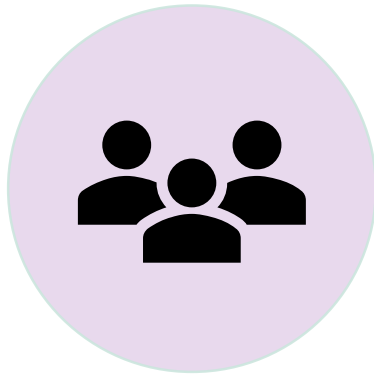
1. Enable Community

2. Remote Communication & Collaboration

3. Inclusive Leadership in Virtual Team

Enable Community | Structuring Remote Work

Leadership must clearly define remote working options and expectations, empowering employees to make the best decision for their wellbeing.

Launch defined remote working options and expectations through an ongoing communications campaign, answering FAQs and providing tips and best practices.

Conduct webinars to demonstrate leadership commitment to the success of remote work in support of clients and employees.

Ensure all employees are familiar with relevant policies and understand their responsibilities, including computer & data security policies.

Provide necessary mobile technology solutions (e.g. laptop, cell phone, home network) where not yet available and establish expectations for device security and data privacy (e.g. VPN, encryption).
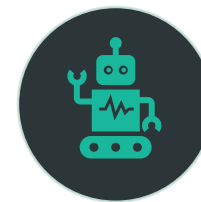
Ensure your organization's IT teams are aware of shifts to remote working and are prepared to support an influx of remote workers.

Enable Community | Structuring Remote Work

Leadership must clearly define remote working options and expectations, empowering employees to make the best decision for their wellbeing.

Provide (virtual) training as needed to ensure all practitioners are skilled in using the technology required to perform their work from a remote location.

Consider whether your remote access function is set up to handle the entire user base coming in at once. Usually it has been set up to account for approximately 5-10% of users. A large influx could cause system crashes and lag.

In addition, organizations should consider the **increased amount of voice and video collaboration.**

Lastly – what will happen post disruption? Will you scale back down to levels prior to the disruption or maintain the higher bandwidth at potentially greater cost.

Enable Community | Remote Work Policy

Timing & Duration. When are you expected to start working remotely? How long will you be expected to work remotely? How will updates to this plan be announced?

Ownership. Who is responsible for the remote work plan for your team? Who will make and communicate remote-specific decisions? Who do you contact for remote-specific questions?

Team. Who will be working remotely, and who will be on-site?

Internet access. Do you have high-speed internet access at home? If not, will you be able to get access? Or will you have to access high-speed internet elsewhere? What will you do if you cannot access the internet?

Account access. Do you have access to all the accounts you will need to use? Do you need to use a VPN? If so, how do you access?

Equipment. Do you have a laptop? A working web camera and microphone? Other equipment you need to do your job?

Contact info. Do you have all the contact information for the people you will be working with?

Communication. What communication channels will you use to communicate with your team?

Schedule. What hours are you expected to work? What hours will your team be working? How will you share your availability?

Enable Community | Remote Work Policy

If you're a manager, answering these questions will provide a framework for a remote work guide that you can distribute to your team during this emergency period.

If you're an employee, answering these questions can help provide you with an outline for getting set up effectively during this emergency period.

Security. What security or safety measures do you need to practice?

Meeting Schedule. What upcoming meetings can be rescheduled? What meetings should shift to virtual meetings? What recurring meetings must continue? What meetings could be handled via other channels?

Meetings. How will you hold meetings? What tools will you use? Do you and everyone on your team have access?

Progress Updates. How will you check in with your team and have updates?

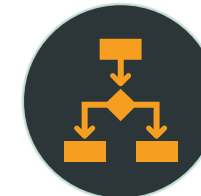**Progress Tracking.** How will you track progress on projects and tasks?

Resources. What resources are available for help in working remotely?

**Questions.** Where do you go for answers to questions about remote work?

Collaboration. What are the different collaboration needs on the horizon? What tools and processes will you use to collaborate?

Decisions. How and where will decisions be documented? Will you create a central and shared location?

Remote Communication and Collaboration | Teaming Virtually

When establishing the expectations for remote working, ensure all leaders and employees understand how to communicate and collaborate effectively when working remotely.
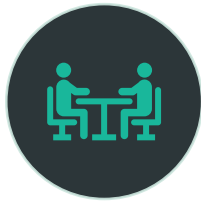
Team leaders should review and update team member responsibilities, ensuring the clarity of roles and objectives within the team while working remotely.

All employees should be responsible for ensuring open and consistent communication occurs across all team members, resolving conflict and potential misunderstandings in an effective and timely manner.

Teams should set expectations by discussing being reachable, responsive, and dependable, and define what "urgency" looks like, and the best way to contact one another in those situations.

Team leaders should allocate time during check-ins to discuss what's going well and what to build further on while the team is working remotely.

Remote Communication and Collaboration | Teaming Virtually

Encourage all employees to be available via virtual collaboration technology, including:

Relevant teleconferencing or video conferencing tools such as: Skype for Business or MS Teams for virtual team meetings, client meetings, check-ins, and other touch points, utilising virtual whiteboards and screen share capabilities as needed.

Use **MS Teams chat or Skype** chat for short, timely communications.

Video conferencing to reinforce the sense of team and enable non-verbal clues.

Virtual workspaces like Microsoft Teams, SharePoint Team Sites and Corporate Online Sites.

Putting It Into Practice

Tips & Additional Resources |
Employee support

10 top tips for remote workers

- Designate a workspace for focus in your home

- Develop a daily routine

- Embrace technology tools for collaboration

- Communicate frequently with your team

- Communicate openly with your clients

- Remain contactable

- Do not over-rely on email/IM – use the phone

- Block your calendar for "working time"

- Dedicate time for informal social interactions

- Regularly review performance with team leader

How We Meet Virtually | Virtual Meeting Hacks

1. Virtual First - Include dial-in details on all meeting invites

Including relevant MS teams, Skype or Zoom details on all invites is a small act that goes a long way, ensuring virtual workers are always included.
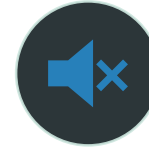
2. Let us see that smile - Turn on your camera

Turn on your video wherever possible and be camera ready. This helps all participants get the most out of virtual meetings.

3. Cone of Silence - Take your call somewhere quiet

Find a quiet space to participate. Open plan environments are saturated with background noise – make sure you use a professional headset.

4. The other cone of silence - Use the mute switch

Use the mute button to prevent transmitting background noise when you're not speaking.

5. Early bird gets the worm - Be on the call 2-3 minutes prior, or 5 if you are hosting

Join virtual calls 2-3 mins early to ensure an on time start. If you are the

6. Efficiency Experts - Time your meetings and keep them short

Not all meetings need to be 45 – 60 minutes long. Aim for short concise meetings that run efficiently - stick to an agreed agenda.

7. Inclusive always - Give everyone an equal opportunity to share their voice

Meeting leaders should use purposeful breaks so that everyone has an opportunity to contribute. If you're a participant, use the raise hand feature if you can't find a break in the conversation.

8. Sharing is caring - Use digital collaboration tools

If one or more members in the meeting are attending virtually, consider using digital collaboration tools such as an in-built whiteboard.

9. Have a plan B - Include meeting agendas/provide everything needed

In the event that screen sharing does not work ensure others have copies of the file prior to the call (at the very least the facilitator).

Proposed Team Operating Norms

Ways of Working		
	1	A designated Program Leader will assume responsibility of the "remote work" governance and approach
	2	Team Leaders will be responsible for aligning on priorities, daily activities and blockers with their teams, and sharing back with the Program Team Leadership as required
	3	At a minimum, all Team Leaders should connect with all members of their team at least once daily to confirm work priorities, safety and needs considerations to be successful in their role
	4	Team Progress reports, including open priorities and risks/issues, should be shared openly across the team on a regular basis throughout the week
	5	Until a steady-state is assumed within "normal" work effectiveness, Program Team Leadership should continue to flex the operating norms as required as lessons learned are applied
	6	Establish standard working hours by which all Team Members will be available for meetings and be responsive to emails, unless otherwise agreed to based on individual considerations

Readiness Checklists | Program and Individual

Program Checklist

The following checklists provide a readiness assessment to identify how both the Program and each Individual can prepare:

#	Checklist Item	Status
1	Alignment on single source of WIP and completed documents is established (e.g., Microsoft Teams)	
2	Validate all documents for shared use have been uploaded onto the chosen central repository (e.g. Microsoft Teams)	
3	Alignment on daily/weekly meeting forums	
4	Alignment on leadership touchpoints and avenue to provide ongoing progress updates and issue/risk identification	
5	Align on reporting artifacts to document progress, risks/issues, and decisions/alignment with the appropriate visibility to Program Leadership and the Program Team	
6	Governance model established to manage/monitor risks/issues, including an urgent escalation path	
7	Provide program wide line of sight to "Out-of-Office" (e.g., vacation, sick leave, personal appointments) and/or times of inaccessibility of the program team members	
8	Confirmation of Team Leaders and team member mapping to ensure lines of reporting are clear	

Readiness Checklists | Program and Individual

The following checklists provide a readiness assessment to identify how both the Program and each Individual can prepare:

#	Checklist Item	Status
1	Ability to attend all meetings via **Teams etc.**	
2	Ability to attend all meetings via Phone	
3	Access Microsoft Teams and/or shared document repository(s)	
4	Ability to access the internet remotely	
5	Ability to access VPN	
6	Delegate/backfill identified in the event of inaccessibility	
7	"Out-of-Office" (e.g., vacation, sick leave, personal appointments) and/or times of inaccessibility has been provided to the Program Team	
8	Access to the appropriate tools/applications (e.g., **JIRA, Confluence, Outlook**)	
9	Validate that all documents for shared use have been uploaded onto a chosen central repository (e.g. Microsoft Teams)	
11	Personal contact information has been provided to the Program Team (e.g., email, mobile, home number)	

Proposed Program Team Meeting Cadence (SAMPLE)

	Meeting	Purpose	Stakeholders	Timing	Duration	Owner
1	Weekly Program Team Stand-Up	• Align on weekly priorities for the Program Team • Identify key meetings, support needs, dependencies	• Full Program Team	Monday AM	30mins	TBD
2	Weekly Team Status Update	• Align on weekly priorities for the Individual Team • Identify key meetings, support needs, dependencies	• Individual Project/Pod/Workstream Team	Monday AM	30mins	Team Leader
3	Daily Team Stand-ups	• Address blockers • Highlight key updates	• Individual Project/Pod/Workstream Team	Daily AM (Tues-Fri)	15mins	Team Leader
4	Program Leadership Touchpoints	• Review team priorities and progress • Discuss urgent items / blockers	• Program Team Leaders	Tues and Thurs	30mins	TBD
5	Weekly Retrospective	• Reflect on effectiveness of the team • Align on changes to team forums, tools, communications, ways of working	• Program Team Leaders	Friday	30mins	TBD
6	Team Working Session	• Review draft deliverables/activities • Brainstorm/discuss key issues or open questions	• Individual Project/Pod/Workstream Team • Other Team Members, as required	1-2 Weekly	1 hour	Team Leader
7	Ad-hoc Collaboration Meetings	• To review in-flight work, discuss open questions and/or collaborate on planning activities	• As required	As required	As required	As required

Week 1   Week 2   Week 3   Week 4

Watch List of Potential At-Risk Activities or Outcomes

Activity / Outcome	Risk Description	Mitigation Tactic	Owner	Status

Virtual Webinar Series

Exceptional Service in Exceptional Times
Webinar #1

In times of uncertainty, being able to connect with customers is critical for short- and long-term success. And as many of us must move to virtual interactions given our current global situation, we must still deliver to the expectations of all our customers. In the **Exceptional Service in Exceptional Times Webinar** we will share the 1:3 Model (1 Mindset & 3 Skills) that early responders use regularly, and every organization can adopt - to remain consistent in delivering exceptional service.

Managing Difficult Conversations with REAL Empathy
Webinar #2

It is easy to withdraw and focus on ourselves in times of global stress. But these are the exact times when we need to connect with our customers and colleagues in a proactive manner. The **Managing Difficult Conversations with REAL Empathy Webinar** will give you the insight into how to flex your *empathy muscle* so that you can manage any challenging conversation - from any social distancing perspective – by video, on the phone or over email.

Working Remotely Wellness Strategies
Webinar #3

For most of us, working at home is awesome – for a while. Soon cabin fever kicks in and you crave to have a quick chat with a colleague at their desk. Since our current global situation is fluid – our **Working Remotely Wellness Strategies Webinar** will provide with the *must-do* activities to keep you going and staying healthy when it is only you, your desk and your computer.

Virtual Communication: Best Practices = Better Results
Webinar #4

Working virtually is nothing new - but as we move to this mode of communication *en masse* – there may be some roadblocks. Should everything be done by email, is Monday.com the best way to go – every time? Great questions with no clear answers. In our **Virtual Communication: Best Practices = Better Results Webinar**, we will share with you the **key best practices** that organizations - large and small - can use to ensure that we all stay in communication.

A SNEAK PEEK

Virtual Webinar Series