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Managing a Remote Workforce: Proven Practices from Successful Leaders

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A Citrix[®] GoToMeeting[®] White Paper

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Executive Summary

There are hundreds, if not thousands, of articles, books, blogs, and Websites filled with advice about how to manage remote workers (or telecommuters, or workshiffters, or distributed teams¹). However, most of that advice amounts to broad generalizations or “bumper-sticker”-like slogans that are well-meant but rather shallow: “Pay attention to your staff’s personal life,” “Measure what they produce, not how much time they spend,” “Hold regular conference calls,” “Check in with your subordinates on a regular basis.”

While those slogans do point in the right direction, they tend to be stated as universal truths even though the real world is full of complexity and varying contexts. Worse, they don’t begin to deal with why and how companies choose to embrace workforce mobility. And an organization’s motivations and experiences make a huge difference in what works and what doesn’t.

Therefore, with Citrix Online’s support and encouragement, we set out to produce a different kind of understanding about the challenges surrounding the management of remote workers. Most importantly, we studied the real-world experiences of leading-edge organizations in order to identify what really works, and under what conditions.

This summary of our research addresses three fundamental management questions:

1. Why do organizations launch distributed work programs in the first place?
2. What practices and tools do successful organizations rely on to manage remote staff effectively?

¹ We tend to use those terms interchangeably, though there are certainly subtle distinctions among them. However, our current interest and focus is on best practices in managing people who are in locations at some distance from their boss. In our judgment, what matters is the distance between manager and subordinate, not what label someone has put on the job category.

3. What critical advice do successful leaders of distributed teams have for organizations that are just getting started?

In the course of conducting this research we interviewed half a dozen “experts” (authors, academics, consultants, and leading practitioners) and spoke with even more actual managers and change agents who have designed and implemented distributed work programs. This analysis of corporate best practices is their story.

Drawing on those conversations we have compiled a set of basic principles and guidelines that we believe goes much deeper than anything we’ve seen elsewhere. We have included specific quotes and organizational attributions wherever we could. However, in some instances we were asked to allow the interviewees to remain anonymous.

Why Do Organizations Launch Distributed Work Programs?

Almost all organizations today are already practicing some kind of distributed work management. In most cases, however, there is either no formal policy, or it’s being done *ad hoc* and in a highly inconsistent manner.

Typically, some employees in some departments are working out of the office once in a while because it’s more convenient for them, or an emergency at home has made it temporarily necessary, or they just needed a quiet place to get a special report completed.

We’ve come to call this kind of informal/implicit program “Don’t ask, don’t tell,” because it’s unofficial, is often not known about in other parts of the company, or is tolerated for certain individuals primarily because they’re highly competent and have threatened to leave the company if they can’t work flexibly.

However, these kinds of *ad hoc* efforts often get out of control. Either they grow too large without any thought to their consequences, or other employees get jealous and even resentful at being unable to take advantage of what they see as a highly desirable “perk.”

Thus, the organizations we’ve spoken with that have moved beyond DADT and *ad hoc* distributed work have usually done so for one or more of these reasons:

Liability Mitigation

Informal programs and *ad hoc* arrangements leave companies open to legal liability for workmen’s compensation, and for potential violations of the Fair Labor Standards Act. Employees who are denied the opportunity to work remotely might become resentful of the perceived inequity and file a claim under the provisions of the FLSA.

One human resource professional we interviewed pointed out that these liabilities may even extend to the selection and hiring process. Although we are not aware of any case law at this time (and we are not legal experts), it is not inconceivable that a disgruntled employee might file suit for not being allowed to participate in an alternative work program. Maintaining a transparent process and appropriate documentation is an important way to minimize the potential of expensive litigation.

Employee Attraction/Retention

Companies in urban areas with long, difficult commutes have found that offering part-time work from home can tip the scales in their favor, particularly in a competitive hiring environment.

According to Phil Montero of [The Anywhere Office](#), 72% of U.S. employees say that flexible work arrangements would cause them to choose one job over another.²

One client organization based in the greater Los Angeles metropolitan area launched significant work-from-home program primarily because it was having genuine difficulty attracting and retaining talent. Six months into the program we asked several of the remote employees what they would do if the company directed them to come to the corporate office full-time. Their answer was simple: “I’d start looking for another job tomorrow.”

Just as importantly, an effective distributed work program can also enable companies to hire talent in remote locations that is unwilling to relocate to the areas where the company already has facilities. Similarly, organizations are able to retain key individuals by allowing them to relocate away from the central office while remaining employed.

We believe that over the next three years the shortage of skilled workers in key industries like health care, education, and local government will be an important driver leading to significant growth in formal distributed work programs. And even though talent shortages are hard to imagine in the current economic climate, we know they will occur.

Geographic Diversification and Globalization

It’s not a new phenomenon, but as an organization opens new facilities in remote locations, it has a de-facto distributed workforce even if everyone is in a corporate facility every day. Historically, a distributed business coped by increasing its travel

² As reported in his recent white paper and post on the [workshifting.com blog](#), “[Work Unchained: The Competitive Edge of the Anywhere Office](#).” Primary source of data: *The Edge Report* - Robert Half International Survey, 2008.

budget and by burning up the long-distance telephone lines. Today, however, with the proliferation of low-cost conference calling and Internet Web conferencing, it's not just about staying in touch with remote *individuals*; distributed *project teams* have become far more common.

We have been working with one high-technology financial services organization that, while predominantly based in the United States, is owned by a British corporation and also has significant operations in South America. Without any formal planning or managerial training, the U.S. company now finds itself with dozens of local managers spending half of every day (or more) on conference calls with their project teams, who are sometimes spread out over as many as nine time zones. It is now stepping up to the realization that effective team-building and staff development under these dispersed conditions is a much bigger challenge than when everyone was co-located in one place.

Note also that once an organization has a formal distributed work program and policy, geographic expansion becomes far easier to plan and manage. One natural consequence of managing distributed work effectively is that many jobs and business processes become essentially “location-neutral,” which simplifies by orders of magnitude the process of opening new remote facilities.

In fact, SCAN Health, a Medicare Advantage company based in Long Beach, California, has begun to incorporate its alternative work program into its strategic business development planning. SCAN's strategic planning executive commented, “This program (alternative work) has fundamentally changed the way we look at doing business. We are no longer constrained by the location of talent, or by the need to reproduce all our business functions in every new geographic area.”

As another example, after completing several acquisitions, one large U.S. company found itself dealing with several distinctively different organizational cultures and work practices in the acquired organizations—and a highly distributed and mobile organization that had been made even more so by the mergers.

A senior executive who took on the complex task of integrating four predecessor company telecommuting programs, recalls:

We went through a brief period when some managers were asking their remote employees to come back into the office as they began the challenging task of merging these newly formed organizations. In many ways their central task was getting to know new team members and building camaraderie and unity within the teams, but they also had to integrate our operations into one coherent company. The outside world thought we were backing away from telecommuting and flexible work options. But actually we just needed

some time to blend the cultures and business processes of these teams, and we needed time to merge and formalize the flexible work policies.³

We now have a comprehensive telecommuting policy with arrangements for our employees for whom it makes the most sense. Today, we remain a highly distributed and mobile organization, with work teams spread out across the United States.

Currently, we have several thousand employees who work from home one or more days each week through a formal telecommuting agreement, and many more who have been enabled with mobile and remote access technologies that allow them to work at a variety of on- and off-site locations.

Cost Reduction

Many organizations, especially in the current economic climate, are actively seeking ways to reduce operating costs. Distributed work programs are one of the most effective ways of achieving badly-needed operational savings.

Enabling employees to work remotely makes it possible to reduce the corporate real estate portfolio by as much as 40% - 50% by offering employees an opportunity to work from home full- or part-time in return for giving up an assigned private workspace in the corporate facility.

One of the most impressive examples of cost reduction/productivity improvement that we know of took place at SCAN Health from about 2007 to 2010.

The focus of SCAN's distributed work program was to (1) reduce the cost of occupancy; (2) improve employee satisfaction with the work environment; and (3) provide a more agile workplace to accommodate future needs.

The project deployed three strategies simultaneously. First, the development of a "work at home" program enabled the company to consolidate the real estate portfolio and enable greater density in the re-designed space. Second, the remaining space was re-designed by shrinking and—in many cases—eliminating private offices, concentrating storage space, and providing standardized "neighborhood"-based work areas.

The results of the transformation project were measured over an 18-month period; they included the following:

SCAN Health has reduced the cost of workforce support by 38% as a result of its distributed work program.

³ Research interview, June 2010.

- ◆ 40% return on investment for program development and deployment;
- ◆ 38% reduction in cost of workplace support;
- ◆ 18% increase in productivity;
- ◆ reduction in provisioning time from 12 weeks to 3 days; and
- ◆ decrease in travel to work by 20% for program employees.⁴

The potential savings if everyone were to follow SCAN's lead are absolutely astounding. Kate Lister of the Telework Research Network recently estimated that employers could save up to \$10,000 a year in operating cost per employee. Multiplied out across the U.S. economy (for the 40% of the workforce who could function remotely), "workshifting" (a term coined by Citrix Online, which also funded Lister's research) could save employers over \$650 Billion per year.⁵

Continuity Planning

In recent years most large organizations have beefed up their business continuity plans in light of external risks such as natural disasters (hurricanes, tornadoes, blizzards, earthquakes), terrorist attacks, or pandemics like swine flu. A formal distributed work program dramatically lowers the risk of operational disruption.

For example, the federal government promotes pilot programs as a way to test disaster policies. During the extreme bad weather in the winter of 2009/10 a number of federal agencies on the east coast found that their telework programs allowed them to continue functioning with minimal interruption. However, managers reported some surprise that "it actually worked," and most agencies returned to requiring employees to be on-site as soon as the weather cleared.⁶

Environmental Impact

Flexible work programs can also have a powerful and very positive effect on an organization's carbon output as well as its economic, environmental, and social contributions to its local communities. When employees are not traveling to a central

⁴ For a more detailed description of SCAN's program and its outcomes, see Chapter 5 of [Cut It Out! Save for Today, Build for Tomorrow](#), IFMA Foundation Press, 2009.

⁵ See "[Workshifting Benefits: The Bottom Line](#)," available free from Citrix Online or the Telework Research Network.

⁶ Nevertheless, the bad weather experiences of 2010 convinced both the Senate and the House of Representatives to pass legislation mandating that federal agencies establish remote work programs. See "[Telework Improvements Act Gets Second Chance](#)," by Kate Lister, posted on Workshifting.com on July 16, 2010.

office they are not burning gasoline, and they're not clogging the highways (or taking up space on the local commuter train).

As an example, the U.S. federal government is **mandating** a 28% total reduction in carbon emissions from its facilities by 2020— a goal that explicitly includes the impact of reduced commute times and decreased use of Federal real estate facilities.⁷

And according to another telecommuting manager in a large global organization:

Our telecommuting program is delivering significant reductions in greenhouse gas emissions. In 2009, a study of our telecommuting population, revealed that our telecommuters avoided over 100 million commute miles per year, with annual fuel savings of at least five million gallons and a net reduction of 50,000+ metric tons of CO₂-equivalents (CO₂e) emissions per year.

Core Best Practices

Regardless of how or why organizations develop formal distributed work programs, those that do it successfully invariably follow five basic principles:

1. **They do it strategically.** That is, the program is formal, explicit, and sponsored by senior management. Everyone knows why the program has been launched and what specific business outcomes it is intended to help achieve.
2. **The organization and its members learn to work differently over time.** In most respects employees continue to do the same basic work even though they are in different places. However, “going mobile” requires some fundamental changes in how they get that work done. More importantly, it almost always includes redesigning core business processes, employing different technologies, and adjusting the way managers operate and communicate. And distributed work essentially forces organizations to measure and reward work outcomes instead of just monitoring employees’ activities through “management by walking around.”
3. **Training is a central part of the program.** And the training programs include both managers of remote workers and the remote individual contributors.
4. **The effective deployment and use of collaboration technologies is central to making distributed work “work.”** And we are not referring just to the basics like email, conference calling, and instant messages. Successful organizations

⁷ Executive Order 13514, October, 2009
(<https://www1.eere.energy.gov/femp/regulations/eo13514.html>)

today make a wide variety of collaboration tools available to their distributed workforce. More importantly, they use those tools both routinely and aggressively.

- 5. Success depends on planning thoughtfully and implementing aggressively.** It's an old idea, but an important one: plan the work, and work the plan. Distributed work programs aren't just about redesigning facilities and letting people move about the country; they almost always include significant organizational and cultural change, and must be treated as such.

Do it Strategically

Simply put, programs that are developed for clear business reasons, with executive-level sponsorship, are far more likely to succeed than hit-or-miss, it-seems-like-a-good-thing-to-do efforts. When there is an explicit business case that is supported by management *and communicated across the organization* it's much easier to overcome the many natural objections to change that inevitably crop up.

More significantly, strategic programs receive time and attention from both executive sponsors and the middle-management designers and implementers who make them work. They are also more comprehensive in scope, including a wider range of functional perspectives, and they therefore address more of the issues that make a difference.

When SCAN Health decided to launch a work-from-home pilot program the organization established a cross-functional steering committee that included representatives from HR, IT, corporate real estate, facilities management, risk management, project management, finance, and corporate communications. The Steering Committee met weekly for over six months before committing to a pilot program, confronting and resolving a wide variety of economic, technology, and legal issues well before they became critical.

SCAN took far longer than most organizations do just to plan a pilot program for only 50 employees, yet once the program was launched it went very smoothly and was fully supported by the participating front-line managers as well as the Executive Committee.

As Phil Montero of [The Anywhere Office](#) put it,

Too many organizations stumble into flexible work on an ad-hoc basis, and then adapt to it only when they realize that it's happening. The transition is often gradual, and without premeditation. Their approach to working as dispersed, virtual teams is born of need, and typically they just make use of the tools available as their people are increasingly required to work together across greater time and distance. Successful organizations make sure their managers are trained in how to lead remote employees and take a deliberate approach and strategy.

Kate North, Vice President of Global Business Development for e-work.com, an online training program firm, made a similar point:

Today, the primary driver for many organizations adopting mobility strategies is cost reduction driven by a shrinking real estate portfolio. And as the implementation team launches, if they have not done their homework and properly prepared their mid-level managers on how to successfully lead a distributed team, their program could hit a wall.

This kind of resistance is valid and real. Very few of today's managers have been mentored or exposed to global best practices for leading distributed teams; and while they may be able to operate a PDA, that doesn't mean they can foster the type of virtual collaboration necessary for creating high performance teams.

In the past, managers picked up a tremendous amount of "visual queuing" when their teams were office-based. They were able to "see," quickly and subconsciously, how their team was doing, what they were working on, and who was connecting with whom. When visual queuing is no longer available, a manager can feel quite vulnerable and frustrated.

The key to success is to demonstrate these global best practices and make them relevant and easy to access.

In addition, if individual employees sense that their manager has not cultivated these skills and doesn't feel secure, they too may resist a mobility program—especially in today's economy. On the flip side, when a manager has honed the necessary skills and continually demonstrates best practices, employees will begin to thrive in the virtual workplace by developing their own skills; and, needless to say, their engagement and productivity will soar.

The director of space planning for a large technology company added this perspective, based on his personal experience leading a global initiative to reduce the corporate real estate footprint by up to 50% (through basic redesign of existing office facilities and aggressively championing workforce mobility):

The absolutely essential foundation of this effort is sponsorship from the top. It's the only thing that's enabled us to be so bold. The executive mandate gives us the freedom to be very aggressive. We have a clear cost reduction goal and that's the thing that is driving our boldness. Without it we'd get so much local resistance that it would never go anywhere.

And where we've already taken major steps, we've been able to reduce our per-employee occupancy cost by close to 70 percent in nine years—70%!—even though real estate costs per square foot have more than doubled in the same time frame.

Our point: clear goals, mandates from the top, and linkages to business imperatives go a very long way to clearing out the inevitable organizational resistance to change. And they provide clear performance goals that everyone can focus on.

Learn to Work Differently

Allowing employees to work remotely isn't just a matter of tossing people out of their assigned workspaces and having them do the same work from different places. When face-to-face interaction is restricted and replaced with less frequent electronic communication, not only do personal relationships undergo dramatic change, but core business processes themselves must be redesigned to reflect the new work environment.

As Glenn Dirks of [Teletrips, Inc.](#), describes it:

Setting up a distributed work program isn't rocket science, but it's not trivial either. In my experience, it's really about building a high-performance organization. Working that way brings all the shortcomings of your basic business practices right up to the surface. It magnifies what you do and how you do it. Things become much more black and white, and you actually become far more dependent on your work practices.

When everyone's in the same place, it's easy to make up for process deficiencies or errors; people can walk across the hall, or convene an emergency meeting on a moment's notice. Obviously, that just can't happen when the workforce is dispersed all over the place.

One more thing: managing in itself doesn't really change that much. Managers just have to accept their responsibilities for being a good manager—which for me means defining the work that has to be done, assigning the work to the right people, setting clear performance goals, and then holding people accountable for getting it done. Whether managers operate that way or not is much, much clearer in a distributed environment where they can't intimidate folks by peering over their shoulders all day long.

In short, the more you go “virtual,” the more the quality of management matters.

We also discovered that most companies go through a rather typical learning curve, usually beginning to see productivity improvements only 15-18 months after they launch a new program.

More specifically, several new ways of working are correlated with successful programs. When we asked senior practitioners within the federal government and at a large financial institution to reflect on what made their experiences positive they identified five specific practices that, in hindsight, were critical.

Five critical practices for a successful workshifting program

1. **Going paperless.** Committing to digital information flow and storage is the single most important thing you can do to enable efficient distributed work. People can be much more mobile when they don't have to access paper documents that are by definition stored in only one location. The real magic of centrally stored *digital* information is that once it's online it can be accessed and processed from almost anywhere. Most organizations already have formal "document retention" policies; they just need to learn to use them.⁸
2. **Carrying the tools you need with you.** One government agency we studied no longer has *any* desktop computers. Everything is portable, although all laptops have physical security devices and are assigned to individual employees. That makes it really, really simple for staff to "pick up and go." This degree of technology mobility increases the likelihood that people will work wherever they are—because they can.
3. **Making time to practice new tools such as job-specific software applications.** Give employees time to learn how to use new collaborative technologies well before they are expected to integrate them into their work style. We are talking about much more than a simple orientation to a new version of a program. Give the new tool to the team and let them "play with it" in "off-line mode" before they are explicitly responsible for getting the job done with it.
4. **Being "contactable" (i.e., published times when people are available).** When people work in a single central location everyone assumes that if they can see you, you are available to talk. When you are remote you should advertise your availability and set aside specific blocks of time for calls and other real-time collaborative activities. One manager called these times his "open-door hours."
5. **Develop personal discipline, including knowing when to "unplug."** Gil Gordon (one of the thought leaders we interviewed) is famous for promoting the value of getting *offline*. In his view, many employees become overly connected and can't separate work from the rest of their lives. There is a psychological risk in being away from the direct supervision that helps people know when they are "at work" and when

⁸ For an extended discussion of the value of going paperless, along with guidelines for how to do it, see Chapter Nine of [Cut It Out!](#), "The Paper Trail: Follow the Paper, Find the Money"

they're not; burnout can become endemic among remote workers unless they learn how to disconnect.⁹

From the management side there are also several core skills that must be emphasized. As Glenn Dirks noted (above), being an effective manager of a distributed workforce is really just basic good management—but somehow too many front-line managers seem to forget the fundamental things they are supposed to be doing all along.¹⁰

There was amazing agreement among the experts we spoke to about which management skills are most important. Gil Gordon, Ryan Johnson of World at Work, and Durrell Martin, a manager at an advertising agency, all agreed that there are three primary keys to being an effective manager of distributed work.

Three primary attributes of an effective remote manager

1. **Establishing clear expectations/goals.** Set the goals early, put them in writing, and re-visit them on a periodic basis.
2. **Knowing your employees.** Optimize their individual skills and styles; get the right person for the right job at the right time in the right place.
3. **Establishing explicit “Big Rules.”** Define acceptable etiquette, protocols, expectations of team members, norms, and values. Do not assume everyone will understand “how things get done around here.” Be explicit. For example, in one ad agency we know, managers actually assign someone to “shadow” new workers in order to help them learn the not-so-visible “rules of the road.”

However, as trite as it may sound, the **most** critical skill in a distributed work environment is the ability to establish trust (which in many ways translates into, or is equivalent to, employee engagement¹¹).

⁹ See [“Turn It Off: How to Unplug from the Anytime-Anywhere Office Without Disconnecting Your Career,”](#) Gil E. Gordon, Three Rivers Press, 2001.

¹⁰ See also “Which skills and competencies will be critical for leaders as the workplace continues to evolve?” Charles Grantham and James Ware, *Leadership in Action*, Center for Creative Leadership, 2005.

¹¹ “Employee engagement is a leading indicator of financial performance. The world's top-performing organizations understand that employee engagement is a force that drives performance outcomes. In the best organizations, engagement is more than a human resources initiative -- it is a strategic foundation for the way they do business.

Research by Gallup and others shows that engaged employees are more productive. They are more profitable, more customer-focused, safer, and more likely to withstand temptations to leave. The best-

Without trust distributed work programs simply don't work. Trust is essential between managers and their remote staff, but it's just as important between senior executives and the workforce in general (including both remote workers and their in-office peers).

The most common objection we hear from managers who resist distributed work environments is "How do I know they're working if I can't see them?" That's basically a statement of distrust—a belief that employees will "goof off" or otherwise abuse their remoteness and their freedom from "management by walking around."

One executive put it this way:

*"Some managers may not have managed employees who work in a virtual environment and therefore may not feel comfortable with their own virtual workplace management skills. Managing a distributed workforce absolutely **requires** a results-oriented management approach. Whether an employee is working from his or her home office, from a client location across town, or from a company facility in another state, managers today need to learn new ways of supervising that transcend "place."*

We offer several tools to help supervisors adjust from managing employee presence to managing employee output/performance, including:

- 1) A performance management/evaluation process that focuses on defining and tracking goals, achieving results, building leadership effectiveness, and driving employee engagement;*
- 2) A number of remote management training courses that help supervisors learn how to effectively manage in a virtual workplace;*
- 3) Detailed guidance found on our employee Intranet website; and*
- 4) Live support via a help desk function.*

And we have seen far too many examples of senior executives who support the program for everyone else, but refuse to give up their own private offices, even when they are rarely in the building.

We even heard one story about an organization that maintains private offices at corporate headquarters for remotely-located executives who use them less than 5-6 days a year—all the while telling the rest of the staff they may be forced to share desks and "camp out" in conference rooms because of a space shortage.

performing companies know that an employee engagement improvement strategy linked to the achievement of corporate goals will help them win in the marketplace."

See the [Gallup website](#) for more information.

It all starts with effective communication and observed behavior. Talk is cheap. But when an executive vacates a posh corner office and moves into a flexible work environment with a shared desk, that sends a very strong signal to everyone else.

That's exactly what happened at SCAN Health, and that demonstration of executive commitment went a long way towards reducing resistance from front-line supervisors.

When employees observe that rewards and promotions are fairly distributed among remote workers and their office-bound peers they are far more likely to accept some of the "costs" of the new work arrangements (such as smaller workspaces or shared "hot desks").

These examples are just a few of the ways the work environment changes when an organization launches a distributed or flexible work program. It's a combination of leadership and planning skills, personal relationships, tools and technologies, and business processes; all must be rethought and redesigned.

One final word of caution, however. While it is important to anticipate as many changes as possible in the work environment and the supporting business processes, it is also impossible to redesign everything at the beginning. In our experience it often takes up to a year and a half for the new work environment to become fully routine and "business as usual." Ironically, it is only when people have settled in and feel comfortable that the really big, innovative ideas for doing things better (usually by doing them differently) begin popping up.

So begin by knowing things will change, and be open to change from the outset, but recognize that many of the most significant changes will come only when the new work environment has become solidly established.

Build a Definitive Training Program

Given the need for significant change in management practices outlined just above, it's no surprise that before launching a distributed work program and, indeed, on an ongoing basis as additional managers and employees begin participating in the program (and as refreshers for experienced remote workers and their managers)

Everyone we interviewed stressed the absolute necessity of setting up formal training programs.

Both Phil Montero and Kate North spoke of the critical importance of developing and conducting formal training programs at all levels: for managers, for team members working remotely, and for individual contributors.

In Kate's words:

They [the managers] just don't know how to manage remote employees. And usually they don't even recognize that new skills are needed, let alone what those new skills are. They literally are unable to envision the future state; they don't know what it means to lead a distributed team.

A formal training program is by far the most effective way to raise awareness of the new work environment and its implications—to say nothing of equipping participants with the knowledge and capabilities they will need to be successful in the future.

There are many levels of learning, and all are important. One thought leader put it this way, “Executives need briefings, managers need education, and workers need training.” In other words, provide executives with information and analytic models to frame their thinking; provide managers with learning opportunities that are more like workshops and interactive seminars; and provide individual employees with didactic, top-down formal skill training.

“Executives need briefings, managers need education, and workers need training.”

-Thought Leader

Those different kinds of learning reflect the differing needs of the three primary levels of responsibility in any organization. This way of describing the shape of a “training” program probably oversimplifies the basic curriculum by at least an order of magnitude, but it does capture an important principle about including all three levels of stakeholders in the formal learning program.

But we aren't talking about just training in how to use email, or VPN technology, or Web conferencing tools. We also include learning how to be productive when alone, how to use performance management systems to focus on results rather than hours worked, learning about the etiquette of communicating with remote colleagues, staff, and bosses, and learning how to build trusting relationships up, down, and across the organization when its members are widely dispersed.

We have compiled a sample distributed work training curriculum based on our recent research interviews and our own years of experience in this area. It is attached as Appendix A.

Deploy Collaborative Technologies

Several interviewees noted that today, at least in North America, the technology tools necessary for supporting distributed work are readily available as commercial platforms and/or consumer products. As little as five years ago that was not necessarily true. Technology has ceased to be a barrier to implementing distributed work programs.

The minimal technology tool set appears to be (not in priority order):

- ◆ Smart phone connected to enterprise email;
- ◆ Web-based remote access;
- ◆ Secure laptop with logins and individual personal identification numbers; and
- ◆ Wireless networks within company facilities

But there are also many readily available software-based collaborative tools that help make distributed work productive, effective, and surprisingly low-cost. Without identifying specific products by name, we nevertheless recommend exploring a portfolio of tools that includes:

- ◆ instant messaging and online “chat” packages;
- ◆ voice-over-IP audio and video conferencing applications;
- ◆ screen-sharing and remote access software;
- ◆ other Web conferencing and remote presentation tools;
- ◆ team collaboration workspaces (including shared file repositories, threaded discussions, group calendars, and project management tools);
- ◆ document sharing and collaborative writing tools;
- ◆ project management software;
- ◆ event scheduling tools;
- ◆ social networking applications¹²

We heard three recurring themes about collaborative technologies during the course of our research:

1. **Test-drive them** under close guidance before you deploy them for actual business use in the real world. That way you give people the freedom to try out and master new knowledge and skills without the pressure of producing real work. This approach removes most of the stress of learning to use the new tools, and it’s another strong argument for a comprehensive training program (again, see Appendix A for a sample training curriculum).
2. **Show people how the technologies can be used to enable and even promote social interaction.** That is, encourage the use of tools like Web conferencing, instant messaging, social networking, and online “shadowing” (seeing what others are doing and where they are).

¹² These categories have been excerpted from [Robin Good’s Collaborative Map](#) (“The Best Online Collaboration Tools 2010”), a website that contains the most comprehensive inventory of collaboration tools—complete with active links to the most widely-used individual products—that we know of.

3. **Recognize that there isn't one IT solution for everyone.** Employees with different job responsibilities and mobility patterns typically require different kinds of technology support.
4. **Use the technology to make individual and team performance transparent.** One firm actually posts key performance statistics online daily so that superior performance can be instantly seen and recognized (of course, sub-par performance is also instantly visible). Interestingly, this particular practice makes peer pressure and support a key part of the management system.

We found two instances (a federal agency and an advertising agency) where an external third party was brought in to help set up, configure, and train new mobile workers before the ongoing, routine aspects of tech support were turned over to the internal IT professionals. Quite frankly, many existing “inside” IT organizations don't have the capability to support remote workers when an organization first begins its journey into distributed work.

Many “inside” IT organizations don't have the capability to support remote workers at the outset of a distributed work program.

However, that kind of support is critical to organizational effectiveness and productivity. One professional services organization with several hundred consultants who spent 80% – 90% of their work time at client sites supplied the tech support group with an inventory of extra laptops at corporate headquarters. If anyone in the field had a malfunctioning computer, a new one (fully loaded with the right software and configured for immediate online access) could be shipped overnight anywhere in the continental United States (the firm's European tech support program had a similar capability). The firm recognized early on that the most expensive part of a laptop computer isn't the hardware or even the software; it's the salary (and the lost work time) of the professional who depends on it.

This insight comes from a highly experienced telecommuting advocate:

*Like many companies, we began our telecommuting program several years ago with a “one-size-fits-all” approach to technology. We've since learned that in order to successfully expand a “work at home” strategy—one that delivered the same computing experience regardless of location, and leveraged the right devices to meet user needs—we needed to “rethink” not only the way we outfitted telecommuters, but what we did for **all** mobile and remote workers as well.*

As a result, we've established common user profiles based on business-specific functions, so that our IT department can optimize the device environment, rationalize support, improve the user experience, and provide location-independent functionality. In our 2009 Telecommuting Survey employees indicated that they believe we have the right technology, systems, and tools in place to ensure that they are effective when working from their home office locations.

Plan Carefully, Implement Aggressively

When we asked successful companies to reflect on the implementation strategies that worked, their recommendations were somewhat counter-intuitive. What clearly doesn't work is "Ready, fire, aim." The order of the steps for planning a program is different from the sequence in which implementation should actually occur.

Any change agent has to plan carefully to maximize success. Rushing to implementation is exactly the wrong thing to do. As an example, consider the "simple" task of mowing a lawn. You shouldn't just grab the lawn mower and start whacking away—at least if you want to do a good job. Adequate preparation includes making sure you have enough gasoline, checking that all the kids' toys are picked up, clearing out all the rocks, and putting on safety goggles and ear plugs *before* you begin mowing.

When you apply this same logic to the components of a distributed work program you will recognize that they should be introduced in the following order:

1. **Human resource support systems** (i.e., performance management, training design, and organizational change support)
2. **Policy development** (i.e., who, why, and how, the program will work, along with legal requirements and obligations)
3. **Technology** (i.e., selection, investment, training, and remote support)
4. **Business process redesign** (learn by doing; don't try to anticipate all the details in advance)

Look carefully at your implementation plan; you can often spot the seeds of failure very early on. Support systems must be developed and vetted first. Then focus on policies, technology, and finally a business process review.

Plan the flight, then fly the plane.

Unfortunately, we have seen case after case where it's been "Give them laptops, send them home, and we'll figure out the other stuff later." Our interviewees consistently noted that that kind of approach is a recipe for disaster. Every good pilot will tell you, "Plan the flight, then fly the plan."

What Gets in the Way?

What can we learn from organizations that mismanaged the transition to workforce mobility, or failed to benefit from them? As it turns out, the thought leaders we spoke with have as much experience with programs that failed as with those that were obvious

successes. What follows in this section is a compilation of their observations about the sources of those failures.

Lack of leadership

This one is easy, and relatively obvious. But it's incredibly important.

Leaders at any level in the organization who give only lukewarm support (or active resistance) to distributed work programs doom them from the beginning. The resulting attitude of "We're doing this because corporate told us to do it." can sabotage any change program almost immediately. If leaders aren't onboard just stop and go back to square one.

Leaders who give only lukewarm support to distributed work programs doom them from the beginning.

Programs being driven from only one disciplinary perspective.

For example, if IT is implementing a project without truly collaborative support from HR and Facilities Management, the effort will be probably be viewed as something to keep the "techies" fully employed, and will likely be met with resistance or, at best, with a neutral shrug. A program that lacks input from all three of these critical perspectives will not only fail to win adequate support, but its actual design will also be less than optimal.

Rushing to judgment

We are aware of one organization in which management announced on a Thursday afternoon that an entire business operation (around 2,000 employees) would "go mobile" the following Monday morning.

To no one's surprise (at least in hindsight) the program crashed, and productivity (as measured by sales revenue in this case) fell off quickly and dramatically. The lesson learned is to phase these kinds of projects in and give the organization and its people time to understand, to adjust, and to learn the new skills, new tools, and new business processes that are central to success. And give the workplace services and technology teams enough time and budget to put the new support infrastructures in place before you get too far down the road.

Giving up too soon

The obverse of rushing to judgment is pulling the plug too quickly. Change almost inevitably creates resistance. One practitioner said, "Just give it six weeks and most of the resistance dies out and disappears." A thick skin and a willingness to "tough it out" through the inevitable battles and short-term productivity declines as the changes take hold are almost as important as aggressive sponsorship and a well-designed program.

The absence of continuous learning systems

The truth is that each company culture is unique. In addition, it's impossible to anticipate all the things that will happen as the program unfolds. The business climate changes, new regulations come into effect, major advances in technology occur, mergers and acquisitions happen. Any of these events, or others that are equally unexpected, can significantly alter the trajectory of a distributed work program.

Some organizations are highly experienced at dealing with change; their industry is characterized by rapid new product development, or new competitors enter the market frequently. Other organizations have learned to thrive in very stable environments and so have had little need for continuous learning and adaptation. So when a major change in the work environment comes along they simply don't know how to adjust.

The absence of long-term experience with change as a way of life, or the lack of a formal change/adaptation process, will wreak havoc with even the best-designed programs.

What Advice Would You Give Others?

Our first advice, of course, is to follow the five best practices outlined above. But when we put this final question to the thought leaders and practitioners we spoke with they added several additional insights, which nevertheless serve primarily to underscore and reinforce the core principles we have already described.

Tie the program to an explicit business need—and then link that need to personal behaviors.

At their base distributed work programs are large-scale organizational change initiatives. As such, they must have a well-understood and clearly articulated business purpose or they will be dead on arrival. Executives must communicate clearly, and repeatedly, the business reason for initiating the new work environment.

Senior management should also spell out the “give to get.” That is, what are employees “getting” in return for what they are “giving” up. For example, in many instances employees who are offered an opportunity to work from home several days a week must in return give up an assigned or dedicated workspace in the corporate facility. Working from home is the benefit; giving up a personal space in the office is the cost of getting that benefit.

When senior management articulates clearly the business rationale for moving to a flexible work program, employees are far more likely to accept some “costs” even when they don't like them, knowing that the program is central to the company's future success.

Take training seriously—but don't develop it from scratch.

As we've already pointed out, training at all levels of the organization (and for everyone affected by the distributed work program, including those who remain in the corporate office but interact with remote workers) is critical to success.

However, don't try to re-invent the wheel. There are many commercially available programs that are well-thought-out and relatively inexpensive to acquire. The majority of the good programs (both "live" and prepackaged) can be conducted on-line and customized to fit local conditions (it would be somewhat ironic to require staff to be onsite for all the components of a training program about working remotely).

Note, however, that if your organization is currently spending less than 1% of revenues on existing training programs it may be a hard sell to go outside for distributed work training. These programs are most effective when they are seen as part of an organization-wide commitment to people development.

Don't let training become a one-time event.

Effective employee development in any area requires more than a one-time experience. The best development programs extend well beyond a single event, ultimately being woven into ongoing management practices and business processes.

For example, Phil Montero, who conducts regular Webinars on leadership for managers of distributed teams, likes to point out that the kind of remote interaction he has with participants, and they with each other, doesn't have to end when the formal program is over:

My programs focus on the value of open sharing among organizational members. I try to role-model the way we want the managers to work in the future by making sure the Webinars include lots of active participation and interactive conversations.

And I make a point that once the managers are actively leading their teams they can (and should) treat their staff the same way that I treat them—encourage open sharing, ask about what's going on in their personal lives, celebrate major events, check in on how things are going, and so on.

That's really just being a good manager, but it does take quite a bit of "leading by example" to build those kinds of behaviors into their daily routines.

Reward success

Success for most workers comes naturally. In fact, putting in place a robust performance management system may well increase employee productivity and satisfaction for the

simple reason that it highlights (and rewards) good performance. And it makes clear to employees exactly what kind of performance the organization needs from them.

Clarity of performance expectations is even more important for managers. A manager's performance review should include a factor of demonstrated competency in "managing at a distance." And visibly rewarding those who are successful at it will help enormously to drive a program from small-scale pilot testing to company-wide implementation. In one organization we know the direct linkage of program success to the annual executive bonus program acted a supercharger for the alternative work program.

Adaptation as a normal business practice

The evidence we have seen and documented indicates that after approximately two years of experience most distributed work programs quite simply become "the way we work around here." They lose their special status and line management is empowered to design and implement programs with IT/HR/CRE support. It moves from staff to line.

Concluding Comments

This research has been both enlightening and confirming. We've been tracking distributed work and workforce mobility for many years. We've helped clients write telecommuting policies; we've built the business case for flexible work programs; we've designed, implemented, and evaluated pilot projects and training programs.

We have always been major advocates for flexible work. Yet interviewing other thought leaders and experienced practitioners over the past several months has re-energized us and strengthened our belief in the "rightness" of flexible work.

While every organization has its own reasons for adopting new ways of working, we were reminded once again that the primary driver for change has always been cost savings. Especially in these difficult economic times senior business leaders continue to focus on being "lean and mean." Yet for most of them, unfortunately, that really means doing the same things, in the same way, with less (we call that working harder, not smarter).

But almost all the practitioners we talked to also mentioned that flexible work was rapidly becoming a foundation of their talent attraction/retention strategies. While attracting and retaining talent may not be a core challenge in the short term, all of the interviewees recognized that in today's culture flexible work is rapidly becoming the norm. The kind of well-educated, highly motivated people they want to join their organizations simply expect to be treated like adults who are fully capable of deciding where and when they need to get their jobs done.

Yet the rate of adoption of flexible work arrangements continues to be much slower than it should be. We believe there are two primary reasons. First, most senior executives don't fully understand the compelling business case. But, second, even when they do grasp the value and actively embrace flexible work as a concept, they fail to understand the degree of change that is required. They are stuck in old ruts and unwilling to undertake the effort needed to install new management systems, implement the right IT infrastructure, and redefine the way managers and staff relate to each other.

We hope that this paper, and the catalog of best practices we've identified, will make the journey to the future of work an easier one. We've done our best to describe the pathway that successful organizations have taken; we've identified the challenges along the way; and we've offered guidelines for overcoming them.

In the end, as we have suggested, it all comes down to trust. Trust the organization and its people to do what they're asked to do: hire people to accomplish a specific task; measure and manage them on the basis of results; and don't worry about controlling where and when they do their work.



Appendix A

Sample Training Curriculum for Distributed Workers

Technical

Communications protocols (i.e., common repository and instant messaging)

Performance management (employee and manager)

Ergonomics of a non-standard workplace

Personal discipline (i.e., how to concentrate, keeping formal work hours)

Social

Interpersonal relations—building trust

Personalization of your workspace

Cultural sensitivity (especially in global environments)

Engagement rules (when to talk to someone, when not to)

Community

Environmental impact and documentation

Civic rules such as permits to work at home

Demand for and use of “third places”

Train your neighbor



Appendix B

Contributors to this Research

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Eight anonymous interviewees



Appendix C

About The Work Design Collaborative

(<http://www.thefutureofwork.net>)

The Work Design Collaborative, LLC (WDC), founded in 2001 by Charlie Grantham and Jim Ware, is a research and advisory firm with a single mission: helping create the future of work. Our focus is on the changing nature of work, the workforce, the workplace, technology, and management practice.

WDC has built a global network of resources – practitioners, thought leaders, researchers, and senior consultants – who are committed to building and implementing physical, social, and technology-based work environments that are cost-effective, socially and environmentally responsible, and personally satisfying.

We help client organizations **reduce their cost of operations and workforce support by 40% or more** while creating work environments that attract and retain the best and brightest talent - by providing strategic guidance, change readiness assessments, executive learning, and program management.

We accomplish this objective by focusing on four critical capabilities:

- ◆ Developing Knowledge
- ◆ Improving bottom-line performance
- ◆ Creating new workplaces
- ◆ Building communities

WDC produces and distributes management tools, surveys, benchmark databases, white papers and technical reports, conferences and workshops, newsletters, books and articles, and public presentations on the changing nature of work.