Key Question:

“How do we implement a smart telework program that will provide business value as well as enhanced work/life satisfaction?”

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Telework Program: Three-part Success Strategy

Strategy #1
Determine your compelling business drivers – which may also serve as your business metrics. Tie the program transparently to your mission, vision, business goals.

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Telework Program: Three-part Success Strategy

Strategy # 2
Create a solid, practical Policy and Agreement

- Document the important rules and guidelines
- Clarify roles and responsibilities
- Protect the firm, support the managers and staff

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Telework Program: Three-part Success Strategy

Strategy # 3
Design and roll out a program that encourages management for results:

- Provide training for managers and staff
- Focus on performance and productivity
- Coach for success

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Today’s Process

- Review content in each program area
- Share ideas and answer questions
- Determine what you believe will be policy vs. guidance, additional messages
- Goal: be ready to bring back the bones of a solid program, to be refined based on your own policies, culture, and legal recommendations

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Strategy #1

Determine the Compelling Business Drivers

Why implement telework? What ties it to your firm’s vision and mission? How do you get Senior Management on board?
Recruiting

- Curb appeal as an employer of choice
- Diverse labor pool considerations
- Global access to talent
- Provides incentive in light of congestion, commuting costs
- Mitigates relocation costs

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Retention

- Sends a message of respect, trust, accountability
- Gives staff flexibility, control
- Increases morale
- Increases loyalty
- Offers critical flexibility for lifestage situations
- Increases internal referrals

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Productivity & Performance

- Encourages work planning and collaboration
- Reduces commuting stress, delays, and costs
- Increases focus, energy and work quality
- Reduces distractions and interruptions
- Expands accessibility for clients, remote offices

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Reduced Absenteeism

- Definitive savings in reduced absenteeism
- Encourages flexibility and accountability
- Encourages smart use of leave programs

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**Reduced Real Estate Expenses**

- Reduces real estate, overhead costs
- Enables agility and growth
- Can reduce parking requirements, transportation subsidy expenses

Notes:
Business Continuity

- Infrastructure is in place to support “Business as usual”
  - Technology
  - Roles and responsibilities
- Staff are self-managing and oriented to technology-based collaboration
- Managers know how to oversee a distributed workforce

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Additional Business Drivers

- Encourages management for results
- Fewer cars on the road, lowered environmental impact – contributes to “green” and sustainability goals (and good community citizenship)
- Reduced “presenteeism”

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Strategy #2

Create a Smart, Practical Policy and Agreement

Rules, Guidelines, Intent
Mitigate the challenges
Provide a central consistency amidst “managerial discretion”
Key Questions

- What makes a good policy?
- Why are they important to have?
- What are the biggest challenges to a telework program, and how can the policy and agreement avoid or mitigate them?

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Build a Solid, Practical Policy

Typical Telework Policy elements:
- Business drivers for the organization – with focus on accomplishing work
- Definitions and terms
- Eligibility factors
- Time and attendance practices and recordkeeping
- Roles and responsibilities for supervisors and staff
- Business continuity responsibilities

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Telework Policy Elements, Cont’d

- Viable remote worksites
- Home office setup, safety, zoning, taxes, liability
- Who pays for what
- Technology aspects (equipment, access, and security)
- Maximum number of days
- Training requirements
- Application/Agreement process

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1.0 Purpose, Business Drivers, Important Messages

- Statement of purpose, tied to mission/culture:
  “<Firm> recognizes the need for staff members to have flexibility in their work location and schedules…We trust our staff to be productive and available while not physically working in the headquarters office.”
- Business drivers: “Our program targets these key areas:…”

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Purpose, Business Drivers, Important Messages, Cont’d

Telework

Is…
- A work methodology
- A business strategy
- A management decision

Is not…
- An entitlement
- A reward
- Guaranteed
- Permanent

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Telework Program Participation Guidelines

- First and last: all decisions will be business-based
- Quality deliverables and collaboration are paramount
- Everyone should know the policy and guidelines
- Participation is voluntary
- There’s an implied (or explicit) commitment to business continuity strategy
- Flexibility is key

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Key Question:

“How do you define telework?”

Notes:
2.0 Clear Definitions

**Telework:** The opportunity to complete regular job responsibilities on certain days from an approved alternate work site.

Variations:
- **Regular:** teleworking the same scheduled day(s) each week or pay period
- **Ad hoc/situational:** teleworking as needed, based on work or workplace circumstances (OPM: “Unscheduled Telework”)
- Maximum number of days per week or pay period

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Possible Additions

- Don’t expect the max right from the start
- Reminder that Regular days are not guaranteed (more in a later section)
- Advance notice for ad hoc days
- Process for Unscheduled days
- Medical telework: with physician’s approval, temporary full- or part-time at-home work during medical situation
More Clear Definitions

- **Central Work Site:** Could be simply “Headquarters,” and/or the employee’s officially assigned office location
- **Telework Site:** The approved alternate work site. Could be the employee’s home, a shared business center, client site, firm office closer to home, other approved building (more details later under its own category)

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Possible Additions

- What’s NOT allowed, e.g., Starbucks
- Consider distinguishing a teleworker from a mobile worker, who gets a bit of work done wherever they can (e.g., airport lounge)

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3.0 Process Overview

Enrollment is not automatic, and in fact is contingent on many factors. So here’s the process…

1. Review the Policy and determine your eligibility (see section X)
2. If eligible, meet with your manager to discuss readiness, impact, success factors
3. Draft the Agreement, get feedback
4. Meet to finalize and launch

Notes:
Possible Additions

- More signatures/approvals
- Denial/deferral
- Attend mandatory training
- Trial period

Notes:

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4.0 Eligibility
All Decisions are Business-based

- Telework may not be suitable for all positions or all employees
- Two categories of eligibility:
  - nature of the work
  - readiness of the employee
- Eligibility doesn’t mean automatic approval, or identical arrangements
- Approvals, denials, cancellations, withdrawals, changing days (no matter who requests it) – all must have business basis

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Eligibility: Task/Job Responsibilities

- Minimal need for direct supervision
- Work is “portable,” accessible without loss of quality, timeliness, service
- Security considerations
- Face-to-face communication
- Equipment requirements
- Team interdependencies

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Task/Job Considerations: Is the work telework-able?

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Eligibility: Personal Readiness

- Full- or part-time employee
- Successfully complete probationary period
- Receive a rating of “fully successful” or above
- No formal disciplinary action within the last 12 months
- Able to comply with all Telework Site requirements (see section X)

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Possible Additions

- Operational/Service coverage requirements in the office
  - Day to day
  - Special circumstances – e.g., season, project, event
- Time in position
- Knowledge of key systems or tools

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5.0 Alternate Worksite

- Clarify: Approved alternate worksite
  - Free of distractions
  - Conducive to work
- Include counsel on zoning, taxes
- Real estate savings: possibly shared space; “Hoteling” or “Hot-desking”

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Alternate Worksite: Equipment

- Who supplies/pays for what
  - Computer*
  - Monitor
  - Phone
  - Peripherals (e.g., printer, shredder)
  - High-speed internet access
  - Office supplies
- Reference existing policy/language about returning firm’s property upon exit

*Employee-provided PC requires detailed specs for security and access

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Alternate Worksites: Liability

- Include language on liability
  - Who is covered
  - Process to follow for Worker’s Comp
- Lockable storage, for firm-owned equipment, files, materials
- The firm is not liable for privately owned and used equipment, furniture, etc.

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**Consider: Telework Site Safety Checklist**

- Temperature, ventilation
- Furniture, lighting
- Electrical
- Ergonomics
- Security
- Safety

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Reporting to the Central Work Site

- As necessitated by deliverables, staffing, workload requirements, with as much notice as possible
- Due to power outage or other circumstance at the Telework Site that would hamper full work duties
- Travel between sites not compensated
- Alternate/substitute days may be granted

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6.0 Straightforward Technology and Security Solutions

- Remote access tools and process, e.g., Virtual Private Network, GoToMyPC
- Access to cloud-based applications
- Collaboration tools
- Help Desk/Resources

Notes:
Integrate with Other Security Messages

- Monitor mandatory training
- Remote access, wi-fi, wireless
- Data Encryption
- Transportable materials
- Paper, printing
- PHI, PII, FOIA

Notes:

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7.0 Standards and Terms of Employment

- Reiterate the performance metrics
  - Like everyone else, a teleworker will perform work responsibilities in accordance with his/her performance plan, objectives, and the instructions of his/her supervisor
  - Availability, accessibility, collaboration and service are critical
- Reiterate fundamental standards and practices
  - Teleworkers are still under organizational standards of conduct and ethics

Notes:
8.0 Dependent Care

- Teleworkers will not act as caregivers for dependents or others during working hours
- Dependents may be present but must be under the supervision and care of an appropriate dependent care provider (if you need one while at the office, you need one while teleworking)

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9.0 Time and Attendance Practices

- Core business hours
- Exempt vs. non-exempt timekeeping
- Leave/Paid Time Off/Comp Time
- Holidays
- Reporting / Timekeeper rules
- Other flexible work arrangements

Notes:

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10.0 Suspension or Cancelation

- Business comes first
- Either party can request it
- Possible reasons for termination or change:
  - Change in organization
  - Change in work assignments
  - Negative impact on staff member's performance
  - Negative impact on team performance
  - Insufficient office coverage
  - Breach of security policies or procedures

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**Telework Program Application/Agreement**

- The prospective teleworker must make the business case of how they will do their job as well or better
- Capture the teleworker details – location, schedule, equipment
- Terms and conditions: echo and/or expand upon policy elements
- Build in a renewal process (annual; updates, like number of days; new supervisor)
- Determine signatories
- Consider Telework Administrator role

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What should Bob do if...

- His telework day falls on a holiday
- His dependent care provider calls in sick on his telework day
- He can’t get the remote connection in his home office to work
- He says his manager used to be hands-off but now is checking up on all his work
- His co-worker complains he is having to carry extra responsibilities on Bob’s telework day

Notes:
Strategy #3

Encourage Management for Results

Create a shared picture of a successful team in a flexible workplace
Focus on performance and productivity
Engage the team
Coach for success
Deliver Training

Prospective teleworkers and managers should attend interactive training, including:

- Business drivers
- Policy and procedures
- Performance management practices
- Collaboration
- Work planning
- Problem solving

Notes:
Teleworker Messages

- Double-check your eligibility
- Make the business case and get in sync with your manager: clear picture of success
- Set up the best office for yourself
- Plan your work
- Stay engaged: communicate before, during, and after your telework day
- Manage other stakeholders, e.g., family
- Manage distractions, overwork, boundaries
- Be able to end it

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Manager Messages

- Assess the work and the workers transparently in light of the eligibility criteria
- Communicate what you require and expect
  - From teleworkers
  - From non-teleworkers
  - From the team
- Expect the employee to make the business case
- Review their telework-able work; discuss the metrics of success

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Work Out Practical Communications

- Availability
- Accessibility: email, phone, Instant Messaging, Skype/MS Lync, etc.
- Reporting: keeping each other informed (meetings, dashboard, etc.)

Notes:
Performance is Performance

Important message:
Fair and equitable treatment for teleworkers and in-office workers including
- Periodic appraisals of job performance
- Training, rewarding, reassigning, promoting, reducing in grade, retaining, and removing employees
- Work requirements, and
- Other acts involving managerial discretion

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Promote Community

- Clarify interdependencies
- Emphasize flexibility
- Highlight peer support
- Encourage teaching, learning, mentoring
- Strategize knowledge management
- Encourage and reward collaboration

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Team Messages: Work Out Collaboration Guidelines and Norms

- Schedules
- Calendars
- Shared files
- Telephone, email, and voicemail practices
- Notifications (if any), e.g., to colleagues, external contacts
- Meetings – regular vs. unexpected
- Training
- Business continuity expectations and logistics
- Regular assessments

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Coach for Success

- React quickly and appropriately in performance situations
- Stay on top of boundaries, work/life balance
- Encourage health and wellbeing
- Advise on professional perceptions and career management
- Be ready to end it

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Wrap-Up

Keep tabs on the business drivers and measures of success that will mean the most to your firm and senior management.
Sustain Success

- Measure, refine, and keep it visible as an organizational strategy
- Integrate Telework into your business strategies (e.g., Recruiting, Employer of Choice), your systems (e.g., IT, Facilities), your policies (e.g., Security), and your processes (e.g., Performance Evaluation)
- Regularly engage managers and employees
  - Q&A, FAQ, Brown Bag Lunch conversations

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Long-term Impact

- Curb appeal
- Trust and loyalty
- Balanced message of care, quality, and accountability
- Flexibility and resilience
- Performance and productivity orientation: it’s about what you get done, not where or when

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Thank you!

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