Insight into Offsites: creating a productive workflow with remote employees

Maddy Wilks, Agility Clinical, Inc

ABSTRACT

As the proportion of on to off-site employees shifts within a workplace, it becomes increasingly important to have tools in place to make communication between the two parties efficient. This paper prompts discussion about what to consider when working with remotes, and answers questions about how to create a productive and healthy workspace from a "blended" employee population. Careful planning of communication tools, working hours, time off, and availability of each employee is important. Expectations for both on-site and remote programmers should be clearly defined. Time zone differences should be addressed. Timely recording and dissemination of project information is very important. Verbal and non-verbal communication that is second nature on-site needs to be intentionally addressed to off-site employees. Some remote employees may not immediately absorb the culture or feel like part of the team, so socialization and interaction should be addressed in order to heighten job satisfaction. When all these issues are thought through and taught to both sets of employees, the team can work well together. A company equipped to get the best of both worlds will be well positioned for success in a global marketplace.

INTRODUCTION

The technology to collaborate across geographic constraints already exists and is only becoming more accessible. Commuting can negatively affect the mental and physical well-being of employees (Lowry, A. 2011, May 26), and a workday free of the distractions of an office environment can increase productivity (Fried, November 2010). So how do you "build" a remote office that reflects the onsite company culture?

COMMUNICATION TOOLS

The framework of all communication will be facilitated through hardware. It is imperative to have a clearly defined set of communication tools, including internal phones, instant messaging, screen sharing or meeting software, calendars, and email. While bells and whistles are not necessary, clarity and ease of use are.

WHICH ONE, WHEN?

Each tool is uniquely suited to a specific nuance of communication. Employees should be aware of which tool is appropriate in any given situation.

Instant Messaging

While IM'ing is convenient, it's often ineffective as a way to impart moderate amounts of information. As a conversation or its purpose changes, it is important to know when to switch gears. Employees and managers leave themselves vulnerable to sloppy understanding when relying solely on casual interactions. Instant messaging is perfect for quick, casual, conversational dialogue. It's well-suited to simple questions or chatting, but should not but used for detailed questions, or anything that requires documentation. Examples of IM services include Windows Live Messenger®, Spark®, or Jabber®.

Telephone

Internal phones serve as a more reliable and official point of contact than cell phones, and give each employee an extension, making internal calls a more accessible method of communication. They are useful for long topics or training, and are a better alternative than email for instructive or long back-and-forth conversation. They can also be good way to add social minutes to a remote employee's day. However, they're not ideal for discussing topics that need to be documented.

Meeting software

Screen sharing or meeting software is best for group or initial trainings. It can be extremely useful for demonstrating unexpected results or problems that may be difficult to describe verbally (and for resolving said problems) or performing trainings. It is another method that adds to the socialization of a remote's day, and particularly effective with visual learners. Softwares include Join.me®, GoToMeeting®, Skype for Business®, and Zoom®.

Email

Email should be used to provide a higher level of detail or when a conversation needs to be documented. It is not ideal for trainings, but perfect for step-by-step instructions, or for updates that may need to be referenced multiple times. Unfortunately, an insistence on email or reliance on lengthy email correspondence can produce an over-read workforce, prone to skimming or discarding, and can drain time from an employee's day. It's important to use email as a reference and documentation tool, and to delve into wordier conversations over the phone or meeting software.

Calendars

Calendars are useful for keeping track of impending out-of-office times and scheduling meetings. 5-minute official meeting invitations between managers, project leads, and remotes can get the ball rolling on dispelling haziness and providing better contextual understanding of a project for a remote. Calendars should not be the sole place for keeping track of working hours – upcoming absences or unavailability should be communicated to managers and project teams again before they occur, as there is no empty cubical to remind coworkers of whereabouts.

ON THE CLOCK

Once the structural basis for communication is established, employees should know what to expect out of their locational counterparts. Working hours, time off, and availability of each employee must be predictable and accessible. Communication regarding appointments, meetings, etc. should take place using the time zone of the physical office. Utilizing dual calendars to remind employees of differing hours can be particularly helpful in reconciling schedules and prioritizing work.

On-sites should expect remotes to be responsive during their regular working hours. If a remote has to step away from their desk, takes lunch, or has an appointment, an update to the project team needs to be made or status message needs to be set. It can be very frustrating and cause fission between on-site and off-site team members if tracking down remotes is difficult.

During approaching deadlines, remotes need to remind on-site employees of their working hours and inform them of flexibility. If time zones differ, adjusting workflow to prioritize that difference can avoid resentment and bottlenecking. For example, if an EST employee receives time-sensitive revisions at 5:00 p.m. EST from the PST home office, exasperation may occur. Similarly, not providing a GMT employee with enough to do before EST home office employees leave for the day can infer redundancy and a lack of teamwork.

WRITE IT DOWN

Documentation is essential for keeping the team cohesively informed. Assignments and total project tasks should be kept in a central location and updated by the hour as work is distributed. Remotes should not necessarily have to physically contact a manager or project lead in order to move on to the next task. Workflow should be approached in such a way that if *all* team members were suddenly unable to leave their house, project work could continue normally without interruption or further clarification.

Subject lines should include specific output numbers or dataset names, along with project and study names to create an ease of reference when using email. Project leads or managers should be cc'ed into correspondence (even if input from them is not solicited) to create an easily trackable order of events so that both on and offsite employees are accountable for maintaining open communication.

Timelines need to be published in a central location and updated as necessary. If the contents or date of a delivery change, the lead must ensure that each team member has been informed and that an updated timeline is distributed.

OFF OF SITE, OUT OF MIND?

Project information has to be specifically recorded and disseminated to remotes. Verbal and non-verbal communication that is second nature on-site needs to be intentionally addressed to off-site employees. Examples of communication that falls into grey area might be:

If a project managers stops by a lead's office and gives a contextual update, and nearby team members hear this, their work on the project may change. Remote employees not privy to that interaction may not get the message.

If the lead announces to the on-sites that there will be happy hour at the end of the week because the data is finalized and no major study change are coming, remotes may not understand that program revision is not expected.

If a reminder of a documented timeline is also recorded on an erase board in a manager's office, but with the notation " ? PM out of town," on-site employees may anticipate the deadline being slightly more urgent and have an eye out for changes being made, even though no official changes are pending.

Body language that conveys urgency or stress (or conversely, confidence and ease) can be immediately sensed on-site. If most of the work has been assigned and a remote perceives the project is on-track, then data issues, demanding sponsors, or changes may alter the mood of the project in a way that cannot be understood remotely. A remote taking extra work or helping out could be immensely appreciated at that time, but being unaware, the opportunity to do so is never realized. On the other hand, a remote might feel pressure to work longer hours or communicate more closely than necessary if they feel the project is behind. If, for some reason, that is not the case, they can feel out-of-touch and frustrated at the needless anxiety.

GIVE THEM A RING

Fortunately, frequent casual contact can convey nuance and subtleties that may otherwise go missed by remotes. Brief one-on-one phone calls with project leads or managers and remotes can illuminate hazy understandings and provide context for the project. Performing these check-ins regularly and ensuring that they are casual creates an environment that is conducive to asking questions and maintaining positive communication. 5-minute team meetings with both on and off-site members present can add to the feeling of teamwork and combat isolation for remotes.

The importance of casual verbal contact is often underestimated. It is especially important that an off-site employee feels comfortable asking for clarification or instruction, as their work is often not seen until it is complete, giving no opportunity for correction. Due to the aforementioned contextual barriers, a remote may feel that they often have more questions than other employees, and be discouraged from escalating them. The creation of a workplace where uncertainty can be addressed without discouragement will ensure that remotes are not knowledgeably operating without full understanding.

Additionally, some remote employees may not immediately absorb the culture or feel like part of the team, so socialization and interaction must be addressed in order to heighten job satisfaction. An increase in verbal contact, whether it's by phone or sharing screens, between the employee and the team can bridge that gap. Incorporating small games or trivia into regular company or department meetings can breed familiarity between the entire team. If at all possible, occasional on-site visits should be made by off-site employees.

CONCLUSION

While off-site employees have a lot to offer and can be major assets, specific tools, operating procedures, and environments must be put in place to ensure harmony between on and off-site employees. A company equipped to get the best of both worlds will be well-positioned to achieve success in a global

marketplace.

REFERENCES

Fried, Jason; Heinemeir Hansson, David. 2013. *Remote: Office Not Required*. The Crown Publishing Group.

Lowrey, A. 2011. "Your Commute is Killing You" *Slate.* Available at http://www.slate.com/articles/business/moneybox/2011/05/your_commute_is_killing_you.html.

TED. "Why Work Doesn't Happen at Work". Accessed March 19, 2017. Available at https://www.ted.com/talks/jason_fried_why_work_doesn_t_happen_at_work

CONTACT INFORMATION

Your comments and questions are valued and encouraged. Contact the author at:

Maddy Wilks
Agility Clinical, Inc
mwilks@agility-clinical.com