

Tips for Successful, Productive, and Happy Remote Work

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Sources

Most of the content in this document is paraphrased or drawn from these sources provided by the company Trello. It is supplemented with organizational knowledge.

- https://info.trello.com/hubfs/How_To_Embrace_Remote_Work_Trello_Ultimate_Guide.pdf
- <https://blog.trello.com/happy-productive-remote-worker>
- <https://speakerdeck.com/fredrick/emojis-for-business>

Disclaimer

This document is an informal supporting document. It should never replace COOP directives, guidance or policy from VSEA, HR, or your supervisor and management.

What is remote work?

We can define remote work as “working from home [or other approved offsite location] as a discipline.”

This means you’re treating remote work with an appropriate amount of respect and thoughtfulness at both an individual and at a team level.

Benefits of remote work to the organization

Remote work can be good for the organization as well as its workers.

- **“Eating your own dog food” can improve service.** When we wrk remotely ourselves, we better understand the needs of others who are doing it, too.
- **Improved talent pool.** We improve our ability to recruit in a competitive workplace If we can offer telework as a potential option.
- **Breaking down barriers.** Paradoxically, working remotely may allow us to break down physical/geographic silos, leading to innovation and efficiency.

Fundamental best practices of remote work

Use structure to maximize productivity

Productivity can be high whether working onsite or remotely, though different types of work and personalities may be more or less suited to remote work.

In remote work, it's especially important for managers to set goals and deadlines, develop a framework for regular status updates, and hold weekly (or more frequent) check-ins.

Clearly communicate availability

Remote workers, like on-site workers, may need to attend meetings or set aside focus time. **Use status indicators and your calendar to indicate periods when you might not be as responsive.**

Be creative to maintain organizational culture

A lot of non-verbal cues and quick conversations happen in face-to-face interaction. **Remote workers can build camaraderie through quick chats (voice or text), sharing their pets or workspaces by video, and baking in some time for "water cooler conversation."** Also, see tips below.

Set boundaries and adhere to defined work schedules

Schedule and availability, or policy and procedure, don't change when a person's workspace location changes. In fact, it is a key best practice that **remote workers should adhere to a clear work schedule and boundaries** (see below) as defined with their manager.

Tips for remote workers: staying happy and productive

- 1. Keep your usual schedule and always indicate your status.** This keeps your boundaries clear (see below) and ensures your colleagues know when they can reach you.
 - Adhere to a clear work schedule as indicated in your Outlook calendar, just as you would for on-site work. This includes day's beginning and end, and lunch break.
 - All out of office time should be indicated.
 - Stay logged in to both Skype and Teams and keep your status indicators accurate. This keeps you accessible to all colleagues for a quick chat.
- 2. Actively manage your focus and time.**
 - Plan and set "free" blocks of times when you'll address your high-priority tasks.
 - Set realistic goal each day about what you'll achieve. (One option: those who use Teams can leverage a Daily Stand-Up channel to check in about what they last accomplished and what they're planning to do next.)
- 3. Set clear boundaries in time and space around your work.**
 - If you are able, designate a location in your home as your "office" to help build the sense of boundary between "work" and "not work." The location should be as free of noise and interruptions as possible. Ideally it should have a door that closes. This also means having dedicated childcare, just as we do in the onsite office environment.
 - Physically turn off work devices and exit your workspace when your workday is complete.
 - Never work from bed. This makes it harder to sleep for physical and psychological reasons. It also weakens those healthy boundaries between work and non-work activities.
4. As able, **configure your environment for optimal physical and mental health** (lighting, seating, plants, organization).

5. **Manage your pace.** Remote work can offer increased opportunity for in-depth, focused work. If that's the case for you, you may need to build in short breaks (per the VSEA contract) for self-care and fueling. Or alternate tasks (mentally challenging vs. rote tasks, for example).
6. **Work with your manager and team to ensure you have the needed tools.**
7. **Ensure you are following security policy and procedure when accessing regulated data (PII, PHI, FTI, etc.).** If you have questions about what is regulated or what you should be doing, ask your supervisor.

Tips for managers and teams: creating a healthy remote culture

Structure work

To facilitate successful remote work, managers should set goals and deadlines, develop a framework for regular status updates, and hold weekly check-ins.

Build a shared context

Building culture for remote teams requires **intention**: to share common interests, have meaningful meetings, and understand one another.

This can be called developing a “**shared context.**” Everyone is playing by the same rules, understands the team's practices, and feels that they are operating in an equitable environment.

- In communication, this includes working to **digitally share the same signals** you would have in person, to build trust and to avoid confusion.
- This work also includes building shared **ground rules and expectations**. When you think of a great organizational culture, you might not think of rules. But in this case, rules are social norms that provide participants with an expected experience when they enter the “office.” This helps build trust and connection.

Basic ground rules

- **Always assume positive intent and prioritize empathy.** Since tone and nuance can be lost in text, always assume a colleague is coming from a positive place.
- **Treat others with transparency.** Keep important information accessible to everyone. Log and share decisions made in private conversation; record meetings; and take notes and share them in public spaces.
- **Asynchronous is a-ok:** embrace communication across distributed work schedules. This might require planning ahead to make important decisions.
- **Expect structure:** Establish a process, structure, and agenda around meetings and updates so everyone can follow along, no matter their location. Assign a meeting lead and scribe to ensure key decisions are captured in writing.
- **Different yet equal:** accept that all team members are equal, but their experiences are different. Be considerate and try to include everyone equally in team activities.

Build personal connection

It's important to connect on a personal level sometimes. Some suggestions include:

- Use quick audio or text chats in the same way on-site workers have “water cooler conversation.” Just check in.

- In meetings, set aside a little time for non-work connection about activities, ice-breakers, and non-work things.
- Use emojis and (work-appropriate) GIFs to share humor and communicate emotion.
- Team users can use a “Team Fun” channel to share work appropriate pictures, links, and other media to connect on a personal level.
- Remember we are all humans, even if we are behind a screen, and treat one another accordingly.

Communicate more than you think is necessary

“Follow the [Rule of Seven](#), which states that people need to hear a message seven times before they’ll internalize it. If you feel like you’re over-communicating information, you’re probably communicating just the right amount.”

Adapt communication style to the medium

[The team should consider and discuss when we use different types of communication: chat, email, or picking up the phone/having a voice discussion](#). For example, if a conversation is not time sensitive, it can be sent in an email or posted in a Team rather than pinging someone in chat.

Ground rules for audio or video

Audio or video meeting etiquette is important:

- Mute when you’re not speaking.
- Don’t engage in calls in distracting locations or those with a lot of background noise.
- If using video, keep it on to stay engaged.

Video notes

Some private sector companies use video heavily to keep connected. Video is not in common use at the State of Vermont, but this could be reconsidered if a significant portion of the workforce uses telework, especially if telework is full-time for some.

One optional policy at such companies is that if even one person in a meeting is remote, then everyone should take meetings from their desks and participate using the remote tool, in order to put everyone on the same footing in the call. This could also be considered at the State.

Ground rules for chat or email

- Remember that tools can mask intention and humanity, and that there is another human being at the other end of the conversation.
- Constructive feedback should be reserved for audio or video discussions, not text or written chat, to make sure your intentions are clearly communicated.
- Remember that two people can interpret a chat or email discussion with different tone or intention. That can lead to hurt feelings or unresolved issues.
- Check in with audio or video regularly to avoid issues that arise from relying too much on text communications.
- Let others know what they can no longer see for themselves: if you’re rushing off somewhere or swamped on a project, your response might be brief. Let your colleagues know why.

Ground rules for meetings

- The right tools are important: headphones if needed, internet connection, and quiet space.
- It's more important than ever to communicate meeting cadence, structure, and expectations to attendees.
 - Every meeting should have an agenda, notes, and track items for later discussion.
 - Consider leveraging a collaborative document or tool (OneNote, Word, Planner) where everyone can contribute to the agenda.
- Share all context of the meeting in a written format.

Leverage tools for remote work

Ensure everyone has, and is on the same page about, tools they need to do their job.

Password

Consider how your workstation credentials will be updated as periodically required by the system. Credentials must be reset over OpenVPN or when on the State network (wired or wireless). Options include:

- Proactively reset password when on site
- Proactively reset password over OpenVPN (note: does not work over Citrix)
- The State of Vermont wireless network can be accessed outside of State buildings even if you cannot enter the building.

Internet connection

Most remote work requires an internet connection. In Vermont, getting sufficient bandwidth can be a challenge. If a staff person does not have access to broadband, their management, business office, and IT support may be able to explore other options, for example connectivity via mobile phone hotspot.

Workstation

State-provided laptops are the preferred tool. It is not usually an option to relocate a desktop except in limited emergency scenarios.

Personal devices are not typically permitted. If the situation seems to require a personal device, discuss with your supervisor.

For work serving the Agency of Human Services, workstations should be encrypted whenever possible.

Secure access

Most remote workers can use OpenVPN to access resources behind the firewall. In some cases the worker can use OpenVPN and then route to additional resources using internal Citrix.

There is a very limited number of Citrix RSA tokens to use when OpenVPN will not suffice.

Practice good security and privacy policies whether you are at home, office or other location. For example, lock your laptop if you walk away, ensure no one is watching over your shoulder, etc.

Email

- Can be used through the desktop Outlook client or the office.com web portal
- Best for "broadcast" announcements or discussions that need to be formalized or documented

- Avoid flooding coworkers with quick or complicated questions that should be routed to discussion, chat, or a meeting
- If a conversation moves beyond three back and forth comments, it's time to have a call or meet

Chat (Skype, Teams)

To chat, some teams use Skype and others use Teams. If you have both, stay logged into both to remain accessible.

- Can be engaging and fun to use
- Offer “social” features like emojis and GIFs to foster positive and natural communication
- Group chats or discussion threads record decisions and discussion for future reference and spread/democratize information (any team member can read and catch up)
- Discussion threads or group chats are asynchronous (not everyone has to be present at the same time), helping to avoid unnecessary interruptions
- Live IM (one-on-one chat) is usually synchronous but can also be read/responded to later

Audio Calls

Only some staff members have mobile phones that can be used for remote work.

However, all staff members can conduct audio calls via Skype or Teams.

VOIP phones can't be moved off the State network and will not work if transported home.

- Adds needed nuance and clarity when conversations are heated or confused
- Simple solution for a quick discussion

Video Calls

Today, the State is not a heavy user of video calls, but Skype and Teams are both capable of facilitating video calls.

- Adds needed nuance and clarity when conversations are heated or confused
- Display “gallery view” of all participants during conversation; focus may be automatically shifted to whoever's currently speaking
- Adjacent chat window can provide an ongoing “peanut gallery” of comments and reactions
- Teams offers background blur to avoid background distractions or privacy breaches

Documents

All of the following tools are provided through Office 365 and allow coauthoring and collaboration.

Office 365 can be accessed from state devices through the Microsoft portal at www.office.com. You might need to sign in with your state credentials or authenticate yourself, but you do not need Citrix or OpenVPN to access any of these tools.

- Informal notes or running meeting notes can be taken in OneNote. This collaborative documentation tool allows coauthoring and stores notes by categories. Many SharePoint sites have an associated OneNote, and so do Teams.
- Those who have OneDrive may store draft or personal documents there and can choose to share them. Each OneDrive is dedicated to an individual user, so it shouldn't be used for non-transitory documents.

- SharePoint can be used for collaboration on drafts or to present and share finalized, published documents. Permissions can be set to meet a wide range of needs.
- If allowed by your agency, Teams can be used to collaborate upon documents. The base functionalities are SharePoint-based so do not differ, but the access/interface is a little different.
- SharePoint, OneDrive, Teams, and O365 Groups may not at this time be used to communicate federally regulated information (PII, PHI, FTI, etc.). If you have questions, reach out to the ECM team.
- Documents in network shared folders can be accessed using secure access tools.

Task planning and assignment

These tools can be key in organizing remote work. They can be used asynchronously to define, assign, and hand off tasks.

- Most of State of Vermont staff can use Azure DevOps to plan and assign project tasks.
- O365 Groups or Teams can use a Kanban (task card) tool called Planner.

Troubleshooting

If you experience problems with your work-provided tools or applications, coordinate with your supervisor as needed, and log an Ivanti (help desk) ticket.

If your problem prevents you from accessing the Ivanti system, you can call the State of Vermont IT Help Desk at Phone: 802-828-6620 or toll free 1-855-828-6620 - Option 1 during standard State work hours.

Logistical checklist: preparing for remote work

Staff

- Proactively reset your password onsite (wireless can be received just outside State buildings) in order to avoid challenges with being forced to reset offsite.
- Bring your laptop, charger/dock, and any other needed accessories home. If your location is variable or evolving, make sure they come home with you every night. There may be a form to fill out for some or all equipment.
- Bring your work phone and charger home, and ensure the phone is charged.
- Identify your office location: as quiet and comfortable as possible.
- Test printing at home. (If issues arise, take a screenshot for support use.)
- From home, test your commonly used applications that do not need secure access: Office (Word, Excel, PowerPoint), Outlook, Skype and/or Teams, Edge or other browser. Open the application and use it a little bit to ensure it behaves as expected.
- Test the use of your OpenVPN, Citrix, or other secure access tool.
- Test access to any secure applications through the secure access tool. Try using the application a little bit to ensure it behaves as usual.
- Ensure your upcoming meetings (held by you, and held by others) all offer a Skype or Teams option.
- Update your email signatures if needed.
- Ensure your Outlook calendar information (working hours, lunch breaks, out of office time) is up to date.

- Verify your Outlook address book contact information is correct. If not, log an Ivanti ticket to update it.
- Work with your supervisor to create a regular check-in meeting.
- Work with your supervisor to plan how you will define and check in on daily and weekly work goals and schedules.
- Practice good security and privacy policies whether you are at home, office or other location. For example, lock your laptop if you walk away, ensure no one is watching over your shoulder, etc.

Managers

- Follow related HR policy and procedure. Ensure you receive all required forms: these may include telework forms and remote equipment forms.
- Supply written expectations and/or HR policy and procedure to remote workers.
- Establish communication plan for team members and key contacts, including cadence for meetings and information sharing. It may be enough to add remote options to existing meetings, or you may need to add new ones to replace formerly in-person interactions.
- Review tools and resources with staff, including important internal and external websites.
- Create regular one-on-one check-ins with staff.
- Create regular team check-ins.
- Work with each staff member to plan how will you define and check in on daily and weekly work goals and schedules.
- Review each staff member's secure access needs and options and ensure they are using the correct practices to meet their needs as well as security and privacy requirements.

Managers – enacting remote work during emergency operations

- Identify roles whose business functions can be performed offsite.
- For staff in those roles, work with HR and other resources to answer any questions about limitations on location or distance from their designated work location.
- Determine whether there is any possibility to access your usual on-site work area during emergency operations. If not, consider whether any additional personal items or work equipment will need to be transferred offsite, if possible.
- Ensure you have up-to-date contact information for your team and any other key colleagues.
- If any staff will continue to be onsite during emergency operations, include their onsite contact information into your list.
- If any staff will continue to be onsite during emergency operations, ensure their schedule is clear to the team and key contacts.
- Request each staff member to prepare a contingency plan in case of loss of power, water, internet connection, or other remote issue.
- Identify essential offsite staff and their backups, should there be complications with remote work.
- If your team includes vendors, notify them of the remote work operations and any changes in team contact information or availability.
- Contact vendors that make deliveries.

IT Managers supporting agency staff

Track which agency staff are using external Citrix/RSA token or internal Citrix: this will affect Citrix load.