



SHELTER IN PLACE

Setting Up For Remote Work Amid A Health Crisis

The
Brad Korb
REAL ESTATE GROUP

Shelter In Place: A Guide to Working Remotely

**A How-To Guide to
Stay Productive, Save Your Business,
and Effectively Transition to a Fully Remote Workforce**



Contents Included in Guide:

- *Checklists*
- *Tips & Guidelines*
- *Templates*

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OVERVIEW

We know for a fact how businesses benefit from adopting a remote workforce. US and Canadian entrepreneurs have longtime success in leveraging virtual tools for business success.

This is a guide to transitioning your entire team to work remotely. Continue on to learn how to stay productive, save your business, and effectively transition to remote work.

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SETUP & SYSTEMS: How to get set up to go remote

- How to set up your phone system (Ring Central)

Get your work line forwarded to a VoIP system. Transitioning to VoIP (Voice over Internet Protocol), or softphone system, is the **most crucial first step** to a portable and remote workforce.

More effective than traditional business landlines or cell phones, businesses with a VoIP platform can place outgoing calls or receive incoming calls (and SMS text messaging) directly from a computer, a smartphone, or an outfitted landline phone — anywhere with internet connectivity.

Employees are empowered to operate with their uniquely assigned phone numbers as well as with a general office number.

Recommendation: RingCentral gives a communications bundle with great call line clarity. Their easy-to-use cloud-based solution is more cost-effective to operate than typical on-premises phone systems. [Read more.](#)

Ringcentral is powered by Zoom, offering more than a full calling and texting solutions package. They also have features including team messaging and video meeting capabilities identical to Zoom's platform. [Ringcentral is offering free services amid the COVID-19 crisis.](#) RingCentral's features are great for any team and make collaboration streamlined and convenient.

- The Remote Workspace

Mental support during transition:

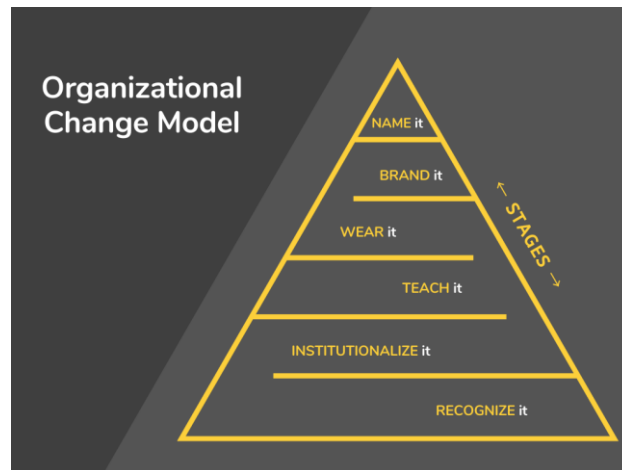
Remote work requires an adjustment period for all employees. A business cannot simply apply the same systems and procedures from the physical office and expect the same productive output immediately. Treat the transition to remote as a retraining process where employees need to relearn how to work effectively in this new environment.

It is important for the management to maintain a fully supportive and flexible state of mind. Encourage and communicate a reasonable adjustment period for allowing

mistakes, offering training, and consistently repeating key messages in order to foster a fully functional remote workforce. Key themes to embody at this time are that your team is a connected, supportive, and a positive force; and mistakes are reinterpreted as positive opportunities.

Organizational Change Framework:

The Organizational Change Model is a great framework to bring change into effect and to breathe life into any idea, concept, organizational culture change, and procedural change.



There are six stages to the Organizational Change model. Turn your list of remote needs and ideas into existence by passing them through this framework

Equipment & Supplies Needed For Going Remote:

A portable workstation ensures cross-functional capacity.

Deliver instructions to your employees regarding their needs for essential equipment and supplies needed for their remote spaces. A portable workstation ensures cross-functional capacity.

Be sure to check in on your employees and ask for feedback to accommodate their needs.

For essential equipment and supplies that cannot be easily moved from the office to a remote setup, managers need to arrange for the item to be couriered to the respective employee's remote location.

Employee Remote Essentials Checklist:

- Portable computer/laptop
- Assigned VoIP phone number
- Headset with microphone
- Quality webcam
- Branded background banners or decor
- Comfortable mouse/trackpad/keyboard
- Office chair
- Notepads, planners, calendar
- Dual screens, if needed
- Reliable internet connectivity (hardwired ethernet connection, if needed)

Tip: Employers report a 30%+ increase in productivity with dual screens!

Remote Leadership:

Leaders and managers need to determine and share their main channel of direct communication. Teams and direct reports will need to know how and where to find you and you must provide this guidance. Management often offers to engage through text messages, direct messages, emails, Facetime, Skype, and Facebook as means of direct communication.

- Systems

There are many tools out there to choose from for setting up a remote organization. Here are some popular tools that you can explore and choose for your business.

Chat tool - We prefer [Glip](#) for team communications. Glip is part of the RingCentral solutions bundle and integrates well with the VoIP service and video meetings. Other popular systems include [Slack](#), [Google Hangouts Chat](#), and [Facebook Workplace](#).

Task management - Common task management systems are [Monday.com](#), [Asana](#), [Trello](#), and [Microsoft Teams](#).

Video conferencing - Known effective video conferencing tools include [Zoom](#), [Skype](#), [Google Hangouts](#), [Webex](#), and [FreeConference](#). These services all offer free and paid subscription plans. Be sure to look into options that best suit your needs, such as maximum attendee capacity.

File sharing - The most common file sharing cloud services are [Google Drive](#) and [Dropbox](#). Continue to “Communications tips for a remote workforce” on this guide for advice on file naming conventions.

Document signing - For processing paperwork and agreements, look into document signing services, such as [HelloSign](#).

Employee scheduling - To track employee time and accountability, look into services like [TSheets](#), [Time Doctor](#), [Time Camp](#), and [Toggl](#). (During the training phase for going remote, a good rule of thumb is to align teams to work during the same start and end times.)

Client scheduling - A helpful tool to create seamless prospect and client appointments is [ScheduleOnce](#).





PRODUCTIVITY & ORGANIZATION

- How to run a virtual meeting

Video Conferencing Guidelines:

- 1. Must wear clothes**
We know how comfortable people can get while working from home. Joking aside, a general rule of thumb is that employees must be “webcam presentable” and be ready to present their face anytime during work hours.
- 2. Must turn on camera**
An effective remote workforce leverages all forms of communication. Webcams are the virtual way to communicate one’s physical presence and show body language. No employee should be exempt from using their webcam.
- 3. Record by default**
Documentation is key for successful remote work. Employees can refer back to past material, and messages do not need to be overly repeated. By default, all

meetings should be recorded. When meetings are for discussing sensitive topics, the record function can be manually turned off.

4. **All meeting invitations must include a topic and reason**

Meetings should be effectively organized so that invitees know the topic, business reason, and agenda in advance.

5. **Assign roles and responsibilities**

The meeting facilitator should assign one, or better yet two, notetaker(s) and allow room to assign project roles and responsibilities for effective collaboration

6. **Determine a follow-up time**

Before ending the meeting, the facilitator needs to discuss on a time to follow up on the topic and discuss from which communications channels to engage.

- Communications tips for a remote workforce

File naming conventions:

Organize your shared files with standardized naming and filing conventions. Here are some considerations.

1. **Organizing Folders**

- a. **Organizational Chart** - Set up and name folders according to the company organizational chart or business process flow.
- b. **Stakeholder** - Create folders to organize work pertaining to your clients and stakeholders

2. **Naming Files**

- a. **Hierarchies** - Standardize naming convention with hierarchies to your liking. *Example: 1) Timestamp 2) Final/Draft 3) Topic 4) Versions*
- b. **Timestamp** - Use YYMMDD to ensure accurate sorting. *Example: January 31, 2020 is 200131*
- c. **Versions/Editors** - Tag filename with personal initials and version at the end of the file name. *Example: V3_JD*

Example Folder Directory: *Marketing > Copywriting > In Progress*

Example File Name: *200317 FINAL Blog Virtual Success V2_JD*

Acumens for working remotely:

Edit and share the following guidelines for establishing remote etiquette.

Chat Etiquette:

- Direct messages and team messages are the same as 1x1 physical conversations.
- Sensitive conversations or 1x1 conversations should not be posted on the chat platform.
- Emojis, gifs, and casual writing are welcome and encouraged! As long as all content remains business appropriate and in good taste.
- Updating chat status to show when you are on break, on lunch, or in a meeting.
- Do not use the 'invisible' status setting as that will be interpreted the same as being unseen in the physical office.
- Do not upload documents directly onto a chat. Instead, file the document on the company file cloud, like Google Drive or Dropbox, and share the link accordingly.
- Determine remote workplace terminologies and conventions. For example:
 - Be right back - *Brb, [time frame], [reason]* - i.e. *Brb, in 15 mins, break*
 - Communicate restroom breaks when needed - *Bio break*
 - Communicate overloaded workload to the manager, when presented with a surge of requests that are outside of intended tasks for the day - *I'm experiencing "creep"*

Work Etiquette:

- Work at your home desk the same way you do at your office desk during the entire shift minus breaks/meals/bio breaks - in summary, your computer becomes your desk.
- “Knock” on someone’s chatbox the way you would announce yourself at their in-person desk to say, “Do you have a minute?”
- Assure you have a working webcam if you are asked for an ‘in-person’ meeting.
- Going to the store or unapproved appointments, and even other parts of your house away from the computer, but not during your break/rest period is not considered telecommuting.

- Accountability

A variety of organizational tools will help employees and the business stay productive. Here are some tips and trips to immediately keep teams accountable and for managers to recognize patterns in productivity. Remember that during an adjustment period to remote work, employers should not expect employees to immediately produce the same amount of productivity.

Task Lists:

Use a task management system to track and assign tasks for employees and teams. Teams often collaborate on projects with project & task management platforms such as Monday.com.

	Person	Status
This Week's Line Up		
Scale The Series Part 4 of 7		Working on it
Is housing about to boom?		Working on it
Underrated Real Estate Lead Generation Ideas		Working on it
+ Add		
Blog Titles/Info line-up		
Scale The Series Part 5 of 7		Assigned
Scale The Series Part 6 of 7		Assigned
Scale The Series Part 7 of 7		Assigned
Real Estate Marketing Ideas & Trends That Will Dominate		Assigned
Green Building Trends Every Agent Needs to Know About for 2020		Assigned

You can also create a simple yet effective Google Sheet to track work. Here's an example.

	A	B	C	D	F	G
1	Task/Project/Content Title	Status	Priority	Editor/Reviewer	Draft Copy URL	Content Type(s)
2	Example Blog	Ready For Review	Low	John Doe	https://drive.google.com/oj	Blog, Email
3	Example Press Release	PUBLISHED	Urgent	Jane Doe	https://drive.google.com/oj	PR
4	Example Article	In Review	Medium	Jane Doe	https://docs.google.com/dc	Article
5	Example Brochure	Ready For Review	Medium	John Doe	https://docs.google.com/dc	Email,Blog/Description
6						

SOD/EOD Reports:

Ask your employees to prepare a simple list of tasks at the beginning of their day, SOD (Start of Day), and an EOD (End of Day) list of accomplishments and everything they've completed. They can use the messaging platform to communicate the SODs and EODs. Be sure that management models this habit for effective training.

Company-wide Activity Report:

Management can record and track productivity on one spreadsheet file, called a Company-wide Performance Report. This analysis allows leadership to observe month-to-month numbers regarding sales and prospecting performance.

- Minimizing Distraction



Pictured: [Children interrupt BBC News interview](#)

Time management - This will be a common theme when training employees on going remote. Destruction becomes easy in a remote environment, and going remote requires a great shift to be self-accountable and staying on track. Common tips to stay productive is to have all employees record **time blocks** onto their shared business calendars, such as Google Calendar or Microsoft Outlook.

Work environment - Ask employees to be aware of the working environment at home. Recommend that they may need modification to stay productive. Find a quiet space in the house that allows for privacy for meetings. Test different parts of the house to establish an ideal workspace. Employers need to consider that children may be present at home and allow flexibility for these environments.

Establishing Routine & Self-Care - Transitioning away from the everyday commute can be destabilizing. Encourage employees to mindfully reset their routine and make space to get dressed, shave, work out, take breaks, find water, and develop a healthy everyday routine.

Tackling eye strain - To prevent eye strain in a new environment, give tips for employees to try to rest their eyes when using the computer for long periods. Rest eyes for 15 minutes after two hours of continuous computer use. Also, for every 20 minutes of computer viewing, look into the distance for 20 seconds to allow eyes a chance to refocus.

- Documentation

Write it all down! - Documentation is an effective method to minimize time for in-person training and give consistent information across the entire team. Microsoft OneNote is a popular way to keep a running, cloud-based notepad.

Standard Operating Procedures (SOPs) - A standard operating procedure (SOP) is a set of step-by-step instructions compiled by an organization to help workers carry out complex routine operations. SOPs aim to achieve efficiency, quality output and uniformity of performance, while reducing miscommunication and failure to comply with industry regulations.

SUMMARY

- The Future is a Remote Workforce

In today's high-tech economy, a remote workforce helps maximize profits, grow clientele, improve business capacity, and often outperform competing companies that have fewer remote workers.

- Envisioning of a New Reality for Your Business

Simply put, a successful remote workforce equips entrepreneurs with tools, strategies, and virtual employees – and when combined, businesses have a competitive edge and find growth while efficient systems and processes are put in place.

If you would like additional information about this topic please call our office at **818-953-5300**

We are here to help you!