

Working Remotely Success Checklist

1. Workspace Set-Up

The first step to successful remote working is designating a specific work location in your home. This allows you to become mentally and physically present for work activity.

Ensure you and your teams have a designated space to perform their work, even if it is a particular seat in the kitchen.

- Designate a singular place for work.
- Get the appropriate equipment to be as productive as possible in your new workspace. Stores may be closing, and supplies limited, but do the best you can. This could include:
 - Separate monitor
 - Detached mouse
 - Detached keyboard – split or ergonomic keyboard is great for painful wrist/hands
 - Electrical outlets with surge protection
 - Appropriate air ventilation and lighting
- Communicate to your housemates that “this” is your area for work. Encourage them to respect your needs and boundaries to be productive by limiting distraction during work hours. Setting clear boundaries ahead of time helps people know when it is okay to talk, and when it is not.

- ❑ Remember, we are all in this together. Have compassion for yourselves and others who are working within a new normal. There may be interruptions, loud noises, or kids screaming. That is okay.
- ❑ Find a dedicated spot in the house that will be your workstation, and communicate as much to your entire house.
- ❑ Ask for their understanding of your needing quiet space, with limited distractions.
- ❑ Use headphones (noise canceling if you have them).

2. Virtual Conferencing Set-Up

Virtual meetings make remote work meetings much easier and more effective. While phones and email work for some activities, virtual conference rooms are great for teamwork and collaboration.

Here is a list of virtual conference rooms to consider:

	Free	Paid version	Notes	Apparo notes
Zoom	✓	\$75 / year + Admin fee paid to Techsoup.org	Purchase through Techsoup.org for Nonprofits: Recommend Pro version.	Best reliability
Microsoft Teams		Free or Donated through Techsoup.org	Microsoft is offering Teams for Free until 1/2021 https://www.microsoft.com/en-us/microsoft-365/blog/2020/03/05/our-commitment-to-customers-during-covid-19/	Included with Office 365
Google Hangouts	✓	Free until July 1st	Best for 1 on 1 calls, up to 25 meetings. https://www.google.com/nonprofits/offerings/apps-for-nonprofits/	Best if you already have G-suite

FreeConferenceCall	✓	Free	Up to 1,000 participants. https://www.freeconferencecall.com/online-meetings	For Audio & Video conferencing
WorkPlace by FaceBook		Sign-up through FaceBook	https://www.facebook.com/workplaceforworkplaceforgood?_hssc=107283485.3.1531521751960&_hstc=107283485.72521f1e4116ef7abb7d2692d7560f23.1519146373520.1531517178214.1531521751960.326&_hsfp=2089187002&hsCtaTracking=bc697fd-89d3-4607-a386-8a8cb222306c%7C8903d445-2dd1-4233-9e8c-cde54dff1f1d	Team Communication Tool
WebEx	✓	Starting at \$13.50	Free version: Up to 100 participants, Currently unlimited call time for Covid-19 https://www.webex.com/pricing/index.html	Enterprise grade tool

3. Internal Communications

Good communication is mission critical with remote teams and takes structuring to pull off well.

Choosing a platform for immediate chat communication is a great start, but also make sure to set clear expectations for communication and rules of engagement. Here are some communication platform options to consider:

	Free	Paid version	Notes	Apparo Notes
Microsoft Teams	✓	Starting at \$5/user/mo	Comes free with O365, has user specifications for healthcare, IT / security, and compliance.	Great for team meetings, file sharing, email, chat
Slack	✓	Starting at \$6.67/user/mo	Best for midsize teams with cross-functional collaboration needs, and document sharing	There is a free version that has limited features

Google for Nonprofits	✓	Free until July 1 or through Techsoup.org	Sign-up through Techsoup.org – there is also a discounted, upgraded version available for NPO's	Good for team to chat, email, file share
Box.org		Free	Purchase through Techsoup.org – 100gb free after \$84 Admin fee	Secure file sharing

- Identify a chat communications platform for all employees to use.
 - Phone
 - A digital communication platform (like from the list above)
 - Text messaging
 - Email only
- Ensure every team member is able to sign on and use the system.
- Set clear expectations about how employees are using your system.

Answer:

- When are employees expected to be available?
- How frequently are employees expected to monitor the platform?
- Ensure all managers are communicating with their teams at least once a day as a team, and once a day to direct reports. This sets the expectations for employee-manager communications cadence.
- Test communications with your team on the platform to make sure everyone can communicate when necessary, and that they feel connected and enabled to do their jobs.

Communicating remotely

- ❑ Get comfortable with making written requests by providing a lot of information. One challenge of remote work versus in-person work is that the tone of communication is lost and you only have peoples' attention spans for as long as they read your message.
 - ❑ This is a great time to work on written communication skills
 - ❑ Make clear asks, provide clear deadlines, and always include relevant information or reference materials as attachments.
- ❑ But ... don't be afraid to hop on the phone, too!
 - ❑ When communication or projects get too complex, pick up the phone!
- ❑ Assess meeting attendees' calendars to find a mutually free time/date.
- ❑ Include a link to your virtual conference room and how-to-join meeting instructions. This could include pin numbers, conference line numbers, or attendee IDs.
- ❑ Turn on your video during meetings. This will increase face time, and allows remote workers to pick up on body language.
- ❑ Dress appropriately (at least from the waist up) for all virtual calls, particularly with customers, clients, or prospective partners.
 - ❑ Maintain professionalism and proper business etiquette at all time.
- ❑ Choose a quiet spot to take or host meetings. Background noise can be interruptive and distracting to meeting attendees.
 - ❑ Mute yourself if you are not talking.