ILRHR563 Transcripts

Transcript: *Course Introduction*

Over the past few decades, we have witnessed significant changes in the nature of work in organizations.

Work is becoming increasingly complex and dynamic. This requires that organizations bring together diverse expertise to solve problems.

Technological advances have enabled organizations to tap into talent wherever it may be located. Companies are also increasingly operating globally and facing competition from not only domestic but also foreign sources. Economic trends are also putting pressure on organizations to do more with less. Thus, companies are looking at how to get the most from their employees.

Finally, companies continue to fight the war for talent. For example, the retirement of the baby bloomers is forcing companies to focus on how to attract, develop, and retain top talent that will lead the enterprise in the years to come.

These trends create a number of opportunities but also clear challenges.
This course will help you to examine how remote work can be used as one lever to exploit these opportunities and also address these challenges within your organization. Over the course of three modules, we will cover a number of different topics aimed at helping you manage remote work in your organization.

In the first module, I'll begin by providing some context. We will examine some of the trends in the area of remote work and explore some of the factors that are driving growth in the use of remote work practices in organizations today. I'll then discuss how to use a big-picture scan, to analyze where remote work can help your organization achieve its goals and also to pinpoint some of the risks or challenges that you may face when transitioning to remote work or expanding your current program.

In Module 1, we will also discuss the importance of cultural support to the success of any remote work initiative, and examine how you can build this support in your organization. The final section of the Module 1 will have you take these concepts and strategies and actually put them into practice by developing a plan to proceed with remote work in your

organization. You'll build a business case, outline an implementation plan or project charter, and decide how to communicate these changes throughout your organization.

In the second module, I'll discuss the importance of introducing greater structure, in the form of formal policies and procedures, as your remote work program starts to grow. We will examine the elements of a good policy, take a look at some actual examples, and then have you examine guidelines that need to be put in place in your organization.

Next, we will examine how to select employees for remote work assignments and how to prepare them to make this important transition. Not all employees, jobs, or business situations are a good fit for remote work. So, this section will help you to determine when remote work should and should not be used.

The final two sections of the second module will examine two factors that have a tremendous impact on the success of virtual organizations: leadership and technology.
We will discuss the roles and responsibilities of remote leaders and explore how to prepare supervisors to make the transition to leading from a distance. We will also take a look at some of the different technologies and tools that are currently available and examine how to make sure the right tool is used in the right situation.

In the third and final module, we will focus our attention on how to use HR metrics to assess the impact of remote work. We will discuss different measures that can be used to evaluate remote work and examine how to design a valid evaluation process.

Finally, we will conclude the course by exploring the future of remote work and what you can do to stay current in this rapidly changing field.

I'm excited to cover these different topics with you, so let's get started.

Transcript: Author Welcome

Hello, my name is Brad Bell, and I want to welcome you to this course on remote work. I'm an associate professor of HR studies in the ILR School at Cornell University. In addition, I serve as a director of ILR Executive Education and as a member of the advisory board for the Center for Advanced Human Resource Studies at Cornell.

I'm excited to spend some time with you exploring the field of remote work. This is a topic that I've been studying now for over a decade.

My early work in this area focused on virtual teams, and in particular on leadership in these teams and how it is different from more traditional teams.

In recent years, my colleagues and I have expanded our focus to include not only virtual teams but also other forms of remote work. We've conducted several large-scale research projects to examine questions such as how remote work impacts employee engagement and career development. We've also continue to dive deeper in understanding leadership in the context of remote work.

In addition to these research projects, we have met with dozens of organizations to learn about their remote work practices. What do their current practices look like? What challenges have they experienced as they have adopted remote work, and how do they deal with them? Where do they see the field going in the future?

There remains much to learn about remote work, but through our research and our organizational partnerships, we've been able to start piecing together a better idea of what makes these programs successful.

In this course, I look forward to not only sharing these best practices with you, but also examining how you can take these lessons learned and put them into action in your own organization.

Transcript: *What is Remote Work?*

So what is remote work, and how does it differ from more traditional work arrangements? In general, we use terms such as "virtual work," "telecommuting," and "remote work" to refer to employees working outside the office, whether it be from home or even another remote location.

However, we should also be aware that remote work is hardly one thing; rather, it comes in a varying array of shapes and sizes. If we look at how organizations are using remote work, we tend to see four different types of work arrangements being commonly used. The first type is home-based work. Here employees work from a home office full-time or part-time. Across organizations employees working from home a few days a week is the most common form of remote work. The second type is flexible work arrangements. These can include job-sharing, compressed work week, and also temporary teleworking, where an employee works from home or some other location maybe one day a week or even one day a month. These arrangements also tend to be quite common across various organizations. A somewhat less common form of remote work is mobile work. These are employees who work from the road, or "out of their cars," we often say. Mobile employees tend to make up a rather small percentage of remote workers in most organizations, but are common in some functional areas such as sales. Finally, we have client-based remote work. Here we have employees that are situated with our clients or customers to provide more intimate customer service, or to perhaps foster partnerships.

As you embark on this journey it will be important for you to think about the types of remote work that make the most sense within your organization. Which types of work arrangements will support your organizational goals and priorities? Which types of remote work are most appropriate for employees in different parts of your organization, or for those employees performing different types of work? You also wanna tailor policies and practices to employees falling under differ models of remote work. For example, organizations often have different reimbursement policies for employees to work remotely full-time or part-time. In addition, a clear picture of which employees are working under different remote work engagements can help guide resource decisions such as how to allocate office space in a particular location.

Transcript: *What is Remote Work?*

The first topic we're going to cover in this module is how to conduct a big-picture scan. When I use the term "big-picture scan," what I mean is taking an in-depth look at your organization in the environment in which you operate to try to better understand how can you effectively utilize remote work practices.

To guide you through this process, I'm going to cover a few issues. First, I will talk about what remote work is and how it's being used by organizations. For example, how do we distinguish remote work from more traditional forms of work, and what are some of the different types of remote work being used by organizations today? Next, we'll examine some of the different factors that are driving the use of remote work. Why are organizations adopting remote work practices, and what are some of the benefits that can come from these programs? Finally, we'll turn attention to your organization and focus on identifying where there are opportunities for you to take advantage of remote work. How can remote work help your organization achieve its goals? How can it help to support critical organizational priorities and initiatives? Also, what are some of the challenges that you may face as you transition to remote work, and how can you manage some of these risks?

Ultimately, conducting a big-picture scan will help you better align remote work with your organizational goals and priorities and in the process more fully exploit the various opportunities that can come from a remote work force.

Transcript: *Align with Organizational Strategy*

As you consider creating or expanding the use of remote work in your organization, there needs to be a strong business case to support the effort. This means looking at how remote work can support key business objectives and priorities.
Perhaps you're trying to grow new business or move into new geographies.

Perhaps you're trying to create connections between far-flung employees so as to stimulate collaboration, creativity, and innovation.

The specific business priorities will vary from organization to organization, but the important point here is really to think about how remote work is aligned with these priorities within your organization.

Building a business case also means examining how remote work will impact your human capital.

It may be an opportunity to tap in to new talent pools, or to keep critical talent from walking out the door. It may also be an opportunity to more fully engage your work force and to distinguish your employment brand from that of some key competitors.

In this section we will explore these different issues by taking a look at some of the key drivers of remote work in today's organizations.

Transcript: Business Drivers

As we think about the key drivers of remote work, we can put them into two broad buckets.

The first is what I referred to as strategic business drivers, or the ways in which remote work can directly contribute to an organization's bottom line or performance. One of the primary reasons many organizations adopt remote work practices, at least initially, is to reduce costs. For example, remote work may allow us to close sites and thereby shrink our real estate footprint.

We can also save travel costs by having employees collaborate through technology rather than face to face.

Although cost concerns often spur remote work initiatives, it's important to recognize that such savings can be elusive. In fact, many of the companies that I've worked with have found that unless you close sites, the cost can be higher to the increase span on technology.

Beyond cost reduction, we could also use remote work as a way to expand globally.

Remote workers may enable us to move into new geographies and serve new customers. Positioning employees in different time zones also allows work to follow the sun as its handed off from one employee or team to the next around the clock.

Finally, remote work can be used as a way to enhance employee productivity.

In fact, some organizations explicitly require higher levels of performance from those employees who want to work outside the office.

Again, however, I would note the companies that I've talked to and work with have often found that remote work results in minimal productivity gains. Generally, they're satisfied if their remote workers are as productive as their office-based counterparts.

As we think about these business drivers, it's important to recognize that these benefits have

been enabled by advances in technology. They really allow employees to access the same information and systems regardless of where they work.

Technology is also allowing employees to connect directly with peers, coworkers and customers or clients just as they would if they were co-located. It's this capability that really allows remote workers to sustain and sometimes even enhance their performance.

However, it's also these advanced technologies that can introduce significant cost overhead when moving to remote work arrangements.

Transcript: Human Capital Drivers

The second bucket of drivers addresses the impact of remote work on an organization's human capital.

Increasingly, companies are using remote work as a critical component of their employment branding. Offering employees the opportunity to work outside the office can be a key way to differentiate our organization from our competitors.

It can also be used to attract talent that in the past was unavailable to the organization.

One company I have worked with, for example, uses remote work as a way to attract nurse practitioners who are located in rural areas. Nurse practitioners are a very difficult group to attract to organizations because it's a very tight labor market.

So by using remote work, the company was able to bring in employees that in general they haven't been able to access in the past because they weren't close to any of their locations.

Remote work can also help employees better manage work-life demands and can attract employees who are looking for more flexible work options. It can also be used as a way to promote employee health and wellness.

In fact, one company I've worked with actually went out and surveyed the remote workers and found that those employees had lower stress than their employees overall.

Finally, companies often find that the remote workers are more engaged.

The autonomy and flexibility that remote work provides can enhance employee satisfaction and keep those employees with their organization and prevent them from turning over.

This table shows the results of a survey that my colleagues and I recently conducted on a large sample of remote workers. We asked those workers to indicate why they prefer working outside the office. What's interesting is, if you look at this table, is that the reasons they gave were actually very diverse.

Now the typical reasons we think employees value remote work, such as childcare and providing parental care, were important and certainly show up in these results. But employees also indicated they value the practical benefits of remote work--the ability to save money, for example, by not having to buy business attire. The time savings they get from not having to commute long distances. And in fact for this sample of employees, those benefits were actually most prevalent and most salient.

In addition, many of the workers indicated that they prefer the home environment. It allows

them to work with fewer distractions. It allows them to maybe get out of the gossip mills that exist back in their workplace.

Whatever it may be they value that home environment as a good place to get their work done. Also noteworthy is the fact that very few employees said they would actually prefer to go back to a non-telework arrangement. When we dug a little deeper into that one percent that indicated this, what they typically said is that they really miss that social interaction with their coworkers. They felt somewhat isolated being out there as a remote worker or they felt like they could be more productive and achieve higher levels of performance by being able to collaborate more closely with their coworkers or being closer to their main customers and clients.

As a final note, I want to point out that these human capital benefits aren't guaranteed. We cannot simply put remote work practices out there and expect to see enhanced employee outcomes. To realize these benefits, employees really have to believe that the culture of the organization supports as well as values remote work.

In particular, they have to believe that they have the same status as well as opportunities in areas such as career development as other employees within the organization.

Transcript: *Risk Management*

When we think about the reasons why companies are adopting remote work practices, we typically think of the business and human capital drivers we have talked about so far, such as reducing costs and providing better work-life balance for our employees.

Risk management does not immediately come to mind. In fact, if you conduct a search online for remote work and risk management, what shows up are entries that focus on the risks associated with remote work and how to limit them.

A growing number of companies, however, are taking a different perspective. They are turning to remote work as an important part of how they manage risk.

As organizations increasingly recognize that their most important asset is their people, they're also acknowledging human capital risk as a key business risk. Organizations face a multitude of potential human capital risk. In fact, a recent report by the conference board identified 27 different types of human capital risk.

Examples include loss of critical knowledge through attrition, low employee engagement, inadequate or declining productivity, excessive turnover or failure to retain critical skills and shortage of critical skills or talent pools.

As I have discussed, remote work can provide a number of human capital benefits, and in the process help organizations manage many of these risks. For example, offering employees flexible work schedules may help organizations compete for a critical talent.

Remote work may also help us to retain key talent and prevent the loss of critical knowledge or skills. For example, it can help us hold on to employees who are forced to relocate with their spouse or partner. It can also enable us to retain key talent when we close a site and employees

are unable to relocate.

Finally, remote work can, as we've discussed, under certain conditions boost employee engagement and enhance employee productivity.

In addition to addressing potential human capital risk, remote work may help organizations address other types of business risk.

For instance, many organizations have developed business continuity plans in the case of a pandemic. These plans typically have two main objectives: infection control and operating with reduced personnel.

Some experts recommend, for example, that during a pandemic, organizations should actually encourage absenteeism as a way to stem the spread of infection.

However, having a remote work force, or at least the capability to have employees work remotely, cannot only help organizations control infection but can also enable them to maintain operations during a pandemic.

By having a remote work force, we may also be able to limit the number of employees who are affected by various disruptive events or crises. For example, if a major weather event such as a snowstorm or hurricane disrupts operations in one of our locations, we may be able to reroute work to remote workers in unaffected areas.

In summary, HR professionals are increasingly being asked to help organizations manage risk and develop business continuity plans.

Thus as you scan your environment, it'll be important not to overlook the potential opportunity to use remote work to help your organization manage not only human capital risk but also other types of threats to your business.

Transcript: *Advancing Technology*

One factor that has certainly driven the growth we have seen in remote work in recent years is advances in technology. We'll take a closer look at technology in Module 2 of this program, but I'd like to take a minute here to examine some of the changes we have witnessed in technology in recent years.

It's clear that recent technology advancements have made it easier to communicate and manage work without being located in the same place. However, exactly how has technology changed, and what are some of the implications for remote work?

To answer this question, let's take a look at technology advancement through the lens of the four C's.

The first C is communication.

In early days of remote work, communication was primarily limited to phone and text-based email. However, more advanced communication technologies, such as cellphones and web cameras, make it easy to send messages, data, and files anywhere and at any time.

These technologies also allow us to move beyond audio and text-based means of

communication. So we can transmit non-verbal cues, images, as well as videos.

The second C is connectivity.
Connectivity is so much easier and faster due to advancements in the areas of broadband, VPN, wireless, Wifi, and LANs. For example, it's been estimated that currently 90% of households with a computer subscribe to broadband services. Broadband penetration has increased rapidly--only five years ago, this figure stood at 65%.
These connectivity advances increasingly allow us to work from anywhere, and the greater bandwidths supports the more data rich forms of communication that I mentioned.

The third C stands for collaboration.
The creation of tools such as Wiki's, social networking sites like Linked In, remote desktop access, web based applications such as google Docs, as well as workflows systems make it easier for workers to collaborate from more locations.
These tools not only allow workers to share information, but also to collaborate on a work product simultaneously in real time.

The fourth and final C is content management systems, these systems enable organizations to easily share, access, manage versions secure, and reuse contact.
Some examples include document management systems, knowledge repositories, content management systems, digital asset management, as well as cloud computing.

In summary, technology advances have led to richer forms of virtual communication, improved connectivity, easier and more productive collaboration, and better management of content. Together these improvements are a big reason why we have seen such rapid growth in employees working outside the confines of the traditional office.

Transcript: *Scan the Organization for Opportunities*

Now that we have reviewed the different pieces of conducting a big-picture scan, let's look at one case study together and see how we can apply these concepts.

In this scenario we have an organization that provides medical transcription services to doctors at hospitals in one large city area; that is, the doctors audiorecord their patient notes and need someone to transcribe the notes into written reports to include in patient files. Traditionally this organization has worked face-to-face.
All of the transcriptionists work together in one location, and most work a typical 9-to-5 schedule. Each day when they come to work they receive a new batch of audiorecordings, which they transcribe so they can be returned to the doctors.
Although this organization is operated in a rather traditional fashion, we know that medical transcription is one occupation in which telework is very common. In fact a recent report by the Conference Board indicates that 44.6% of medical transcription is telework, which is more than

any other occupation. So it's reasonable to ask whether remote work makes sense for this organization.

If we take a closer look at the nature of the work, it certainly seems to be a good fit.
The job is a rather independent one in the sense that the transcriptionists need very little, if any, face-to-face interaction with their co-workers. The job is performed using computer tools that can be set up relatively easily at the employee's home location and really without much additional cost.
Given that these employees are dealing with sensitive patient data, security is an important risk factor that should not be overlooked. In this case the company already has a secure web-based system in place that allows doctors to submit their audiorecordings and receive files containing the transcribed notes.
By using a secure VPN or virtual private network, employees working outside the office could connect to this web-based system to retrieve the audio recordings as well as to submit their finished transcriptions.

Once we know it's a good fit for the job we can examine whether remote work aligns with the goals and strategies of the broader organization.
In the case we learn that the organization wants to grow their business by expanding into small rural communities and even other large cities. To do this they'll need to grow the number of transcriptionists working for the organization.
By offering remote work, the organization can attract talent that's looking for flexible work options, and it should also be better positioned to retain the current employees. In addition, remote work would allow the organization to recruit transcriptionists in new geographical locations, thereby expanding the potential talent pool.

As noted earlier, the organization has traditionally operated on a standard 9-to- 5 schedule. However, doctors often dictate their notes at the end of their shift or during slower periods. This means that many of the audiorecordings would be received late in the day or during the overnight hours, but would not be picked up by the transcriptionist until the next work day. Remote work may provide greater flexibility to workers who want to pick up some evening hours, and may also allow the organization to spread the work out and spread the transcriptionists out across several time zones.
Together these changes could lead to a quicker turnaround time and help the organization attract new customers, or even offer new services such as express reports.

In summary, this case shows how we can use a big-picture scan to conduct an initial assessment of where there may be opportunities to use remote work to advance our organizational goals while also taking into account potential challenges or risks that may be associated with the change in how we structure our work.

Transcript: *Forecast Resistance*

When engaging in organizational change, there is always the potential for resistance. If not properly thought through and managed, this resistance can derail our change efforts.
This holds true for remote work, which for most organizations represents a dramatic change on how work has typically been done.

This resistance can arise from many different sources.
It may come from senior leaders who believe that employees need to be in the office working together if the organization is going to be successful. It often comes from managers, who are used to supervising their reports face-to-face and worry about what will remote work mean in terms of their ability to effectively oversee their employees.
It can even come from the employees themselves. In organizations where face time is viewed as critical to getting ahead, employees may worry about what remote work will do to their careers. During the recession, many employees did not want to work remotely for fear of falling out of sight, out of mind.
And resistance can arise when office-based employees start to question why the employee at the next desk is allowed to work from home and they are not.

Together this resistance, whether from senior leaders, managers, or employees, can undermine the cultural support that's so critical to the success of remote work programs.
In this section, we'll take a look at how you can proactively address these issues and begin building a culture that will support remote work programs in your organization.

Transcript: *Leadership Support*

As with any organizational change, HR initiative, or technology adoption, the support of senior leadership is critical to ensure cultural acceptance of remote work. Senior leadership sends a strong signal to employees about whether the organization truly values remote work and views it as an important source of competitive advantage.

I recently studied a company in which leadership support for the remote work program began to wane after the company failed to hit its numbers over a series of consecutive quarters. The senior leadership team felt that employees needed to come back to the office so they could work together to get the company back on track.
Whether this helps to turn things around at the company remains to be seen, however, one thing is clear. This action sent a strong message to employees that remote work is not highly valued nor seen as a source of competitive advantage within the company.
Essentially, the message was, when times get rough, we're going to go back to doing real work.

If the company decides to reinstate the remote work practices in the future, it will likely be a difficult journey.

I'm not suggesting that remote workers should never be asked to return to the office. In fact, I've seen it done across a number of organizations, often for good reason. Rather, this case highlights the importance of senior leaders for creating and sustaining a culture that supports remote work.

Thus, as you work to create or expand remote work programs in your organization, it will be important to secure the support of senior leaders.

In the next few sections, we'll look at some of the strategies for how you can do this.

Transcript: *Stakeholder Team*

One strategy that can be used to build a culture that supports remote work is to create a stakeholder team that consists of senior leaders from different parts of the organization.

A stakeholder team can serve a number of important purposes.

First, the members of the team can help identify previously unknown sources of resistance within the organization and also suggest ways of how to address them. By unearthing these issues up front, steps can be taken to address them through the design in the marketing other remote work program.

Second, the stakeholder team can serve as a key communication channel.

The members of the team can serve as a conduit to communicate the initiative to other senior leaders in the organization.

In addition, they can explain the new work practices to their employees, discuss how they align with the goals and strategies of the organization, and answer any questions that employees may have. This is important because if communication only comes from HR, then inevitably the remote work program will be seen as an HR initiative rather than a business initiative.

Finally, the stakeholder team can be involved in not only launching the program but also the oversight of the program over time.

For instance, some companies use the stakeholder team to review cases where employees have requested to work remotely but have been denied by their manager. The team may not have the actual authority to overturn the decision, but they can speak with the managers to understand their concerns, and may also discuss how preventing employees from working remotely may impact the manager's ability to attract talent to their part of the business.

In sum, a stakeholder team can be an effective means of getting key leaders on your side and enlisting their help to build a culture of support in their part of the organization.

Transcript: *Establish a Supportive Culture*

In addition to creating a stakeholder team, there are several other strategies that can be used to gain leadership buy-in and build cultural support in your organization.

One strategy is to start small.
Often, organizations feel as though they have to launch the program at full scale, with all the different pieces in place, everything figured out right from the beginning. However, smaller pilot programs provide a nice opportunity to show senior leaders the positive outcomes that can come from remote work and put to rest some of their fears. Smaller pilot programs can also be relatively easy to get up and running. They can take advantage of the remote work and flexible work that is most likely already occurring informally in different parts of the organization.
These informal arrangements can be captured and used to measure the effects of remote work on business and human capital outcomes.

A second strategy is to bust some of the myths associated with remote work.
In many ways, remote work is not that novel. In sales, for example, employees have always been mobile. For some reason, though, flexible work and telework often carry a different connotation. Thus, it is important to debunk some of the myths or misperceptions that may exist.
Related to the previous point, one way to do this is by showing the results of remote work initiatives. Data that show that employees can be as productive working outside the office, for example, can help break down some of the myths that they're going to go home and walk their dog and not work while they are outside the office. Also, encouraging managers to allow remote work on a trial basis can help them to see firsthand that it may not be as different or as challenging as they may have thought.

Finally, it is important to hold managers accountable for the role that they play personally in building a culture that supports remote work.
Many organizations, for example, include questions on their annual engagement survey that ask employees whether or not their manager supports flexible work. Again, managers who score low can be approached to better understand their hesitations to adopt remote work practices in their unit.
Overall, cultural acceptance is essential to the success of remote work initiatives, although it can be difficult to achieve.

The different strategies we have discussed can help you to develop a culture in your organization that really supports remote work, and helps you to build acceptance at all levels.

Transcript: *Support the Culture*

Up to this point we have focused on the impact that organization culture can have on the success of our remote work practices.
What we haven't discussed however is the potential impact that remote work may have on the culture of our organizations.

As remote work expands, it inevitably leads to questions about how this growth could change the fabric of the organization.
How does remote work impact the relationship-based elements of our culture?
How does it change the attachment that employees have to the organization and its values? And at what point do these changes occur?
How big does a program have to become before we see fundamental changes in our culture? Is 10% of our employees working remotely too many? 20%? 50%?

Some companies have turned to technology as a way to address these challenges and try to maintain that relationship-based culture in their organizations.
It is also something that we need to monitor by tracking our remote workers and looking at key indicators as to how they compare to more traditional employees on measures such as engagement.
These are topics that we will address in future modules as we spend more time discussing technology and metrics.

Transcript: *Develop the Plan*

Let's take a look at some of the important elements to include in your implementation plan or project charter.
As a starting point, you should spell out the purpose or goals of the initiative. Essentially, you need to answer the "why" question. Why do we need remote work in our organization?
To answer this question, it is important to consider several issues.

First, what is the business case for remote work in your organization? You should provide information about the business context, the current challenges your organization faces, and how remote work can help address those challenges. Also, you should describe the value that can be delivered through remote work practices. By using remote work to address these challenges, what are the benefits to your organization, customers, employees, and shareholders?
Sometimes in HR, we have a tendency to frame our efforts as HR initiatives rather than business initiatives. Thus, while building the business case, it is really important to keep in mind that a

remote work initiative is not an end in and of itself, but rather should be framed as a means to help your organization address strategic business challenges.

Once you've established the purpose for remote work in your organization, you can then move to identifying key stake holders.

First, you should identify who should be involved in the design of the program. It is important to consider not only those who possess direct expertise or interest in the design of the program, but also those who may indirectly be impacted.

It is important to identify these individuals and to determine the best way to engage them in the design process. It is also important to identify who the key stakeholders will be during the implementation phase of the project. These may be some of the same people involved in the design stage, but there may be some new people who are important to include here.

These individuals would generally fall into two categories, key enablers and key inhibitors, and you should decide where each person fits.

For those that you have identified as enablers of the process, you should describe their interest and motivations for being involved and decide how best to engage them. Likewise, it is important to understand the interests and motivations of those who are likely to serve as obstacles of the process and decide how best to engage or neutralize them.

Once you have mapped out the business case, and have identified key stakeholders, then you can specify how you plan to approach the implementation. Here it can be helpful to create a list of actions that you plan to take to move forward with the remote work initiative, along with deadlines for each. You should also consider the resource requirements for each of these different actions.

My recommendation is to focus on short-term actions that you can take over the next two to three months to move things forward. At the end of that period, you can always come back to your plan and specify a new set of milestones and objectives.

The final piece of your plan involves assessment and evaluation. You should decide how you will know if your efforts have been successful.

What metrics or other indicators, such as revenues, costs, or retention, will you see as a result of the change effort?

In Module 3 of this program, we'll be taking a closer look at the metrics we can use to assess the impact of remote work practices.

Transcript: *Business Case*

As you build the business case for remote work in your organization, it is important to focus on not only the value that it can deliver, but also to understand the implementation and maintenance costs that are going to be needed as investments to get remote work up and running. Just how much is it worth to you to spend to implement it and how much an ongoing maintenance and support cost is it worth annually?

You should understand the level of investment and how it compares to the impact that remote work will have on your organizational goals.

Here's a simple example to help understand the business case financials around implementing and maintaining a remote work infrastructure.

In the current state, this organization conducts quarterly meetings that 100 employees travel to. Their current cost for this one job task over two years is $800,000. In this case, the team has looked at a couple of different options to accomplish the same job task using remote work practices and technology.

In option 1, they pay for a secure web-conference service with associated license fees and annual maintenance costs.

In option 2, they use a free web-based service, though the number of participants in each meeting is limited to 25.

In each case, we can see that with a slight modification to how the work is accomplished, the organization can save significant money. However, we also see that by using remote work, the organization does not save the full $800,000 they are spending for the face-to-face meetings. There are costs associated with the technology, support, and training.

It's also worth noting that these costs are quite different across the two options. The hosted web-conference service is significantly more expensive than the free desktop conferencing service. However, the latter does not provide a secure connection, and only 25 employees can conference in at a single time.

So the organization would have to decide, how important is it to have a secure line, and also whether it is critical to host all employees in a single conference. A bigger conference may be important for ensuring that all employees are on the same page. But perhaps smaller regional conferences would lead to better participation and knowledge-sharing.

A third option, not shown here, could be to employ a hybrid model in which there are quarterly smaller regional conferences held using the desktop software and then one annual conference that all 100 employees attend simultaneously. So in that model, we'd end up with costs somewhere between the two options that we saw.

The underlying point, however, is that as you build your business case, it will be important to compare the value created by different modes of remote work to the costs associated with implementing each within the organization.

Transcript: *Measurable Goals*

Of course, in this example, we only looked at the costs associated with one part of the job; there may be others to consider as you put together a full business case. Either way, by the time you are done, it is helpful to define in quantifiable terms what you hope to accomplish, so that at some point you can evaluate the success of the remote work program.

For example in the case that we just looked at, the company can spend $143,000 on a secure remote work infrastructure, which would allow them to eliminate travel estimated at $800,000

over two years for the quarterly meetings. That would lead to a two-year savings of $657,000, or an ROI payback in less than half a year.

In other situations, a business case may focus on revenue or human capital outcomes, such as higher-quality employees or better retention. Thus, our goals and the specific metrics we would use to assess them will be different, but it remains important to specify measurable goals up front. Doing so helps ensure that you are clear on exactly what benefits you expect the program to return.
We will make sure you are collecting the right metrics, so you can evaluate the program in the future.

Transcript: *Communicate the Plan*

Once you know why along with the, who, what, how, and when, you need to communicate the expected change to those in the organization that will participate in or support the use of new remote work practices.
As a first step, it will be important to set expectations around the measurable goals and changes in current work practices. I've heard many organizations complain that when they first rolled out their remote work program, senior leaders had unrealistic expectations of what it would achieve. They expected to see large jumps in employee productivity, double-digit gains in engagement scores, and turnover drop to almost nothing.
Although improvements in these and other areas are certainly possible, it is important to level-set so senior leaders don't turn in to detractors when their unrealistic expectations failed to be met. You should also communicate the process the organization will take to implement remote work. Who will be involved in the training and ongoing support that will be available once implemented?
This lets those in the organization know that there is a systematic plan to implementing the change, and also helps them to understand the changes they can expect to see in both the short and longer term.

Finally, it bears repeating that all communications should signal the value of remote work to the organization. The initial reaction of many in the organization may be that this is just another HR initiative.
However, by emphasizing the value to the organization, it will become clear that the program is designed to help the organization address strategic business challenges.

Transcript: Ask the Experts: Elease Wright and Pat French on Getting Started with Remote Work

Elease Wright - How did telework get started at Aetna?

It's really an interesting story. This dates back probably a little over ten years ago and maybe even longer than that. But we were consolidating in the late '90s. We were consolidating a lot of our operations offices, and by doing so we were asking some of the most talented people to relocate to where some of the new offices were going to be located. The challenge was that many of the folks who work in our call centers were second-income earners. So the likelihood that they were going to relocate to some of our new locations was pretty slim. And so we were going to lose a significant number of very talented people in the organization. So when we talk about grassroots, some folks got together and said, what can we do--it was business people, it was HR people--what can we do to retain some of the talent that we have in the organization? And someone came up with the idea of, can we try at least, can we pilot a program where some of these folks can remain in the cities they lived in or the counties and towns they lived in, but they could work from home?

So the first form of telework was really work at home. And the first people to do it were some of the most productive and talented people in the organization. So what we did in order to make sure that--if you think about somebody on a call, you have to make sure that the environment in which they work is conducive for the telephone conversations, and so we got real estate people involved, we had HR people involved, we had technology people involved so that we could determine if that home situation could be arranged in such a way that somebody could work with some of our customers and the members and provide them with services. And what we found over time is that it worked very well and that it allowed us to retain some of the most talented people in the organization.

Elease Wright - Has remote work expanded over the years at Aetna? How has it changed?

Well absolutely, because right now we have almost half of our population who are teleworkers, and teleworkers are work-at-home, but they're also people who are mobile, who work out of their cars, salespeople. It's also people who are located with our customers in the customer location. So that's in fact why we changed the language about people who were not office workers, because it wasn't--you know, we've got so many people who started to think, well, there may be different ways that you can do your job where you don't have to be in the office.

So it's evolved over time, as I told you, where it was a way of retaining some of the top talent that we had in the organization. Then about six or seven years ago we realized something. If you could have more people who worked who didn't need office space, there might be a way to reduce the amount of real estate that we leased throughout the country. And so we actually

put together a project management office that was made up of financial people, HR people, technology folks, legal folks, real estate. It was a cross-functional team to say, is there an opportunity for us to have more folks work outside of the office and reduce the real estate footprint that we have for the company? And as we assessed it, we did a pretty robust analysis, we realized that there was this opportunity. And so then what we did was challenge every area within the company to identify people who could work outside the office for the purposes of reducing cost, providing--continuing, you know we wanted to make sure that we maintained the level of service that we provided to our customers.

But you know, reduce cost, fewer people in the office, shrink the real estate footprint that we had in the organization. And so within a period of one year, I think it was in, oh gosh, it must have been around 2006 or 2007, we had a fifty% increase in the number of tele workers in the organization. And over the next year, in 2008, we had a 60% increase, year-over-year increase in the number of teleworkers that we had. So this has been growing. So our target that first year, we had a challenge for folks in the organization, for leaders in the organization to reduce the number of people in the the office. I think we thought for year one if we could get to twenty% on and then we said if we could get to twenty I think within a couple years we got to 30%. And it also became a way for us to attract people to the organization, because we were able to do this successfully and it gave folks a lot more flexibility than you would have in the office. But we also knew that you couldn't just say "Okay, folks, you know we're going to create this environment where you work outside the office, so everybody go forth and do it." We also knew that we had to build an infrastructure around it so that it could be successful.

Elease Wright - What is the business case for remote work at Aetna? Have there been any surprises you didn't expect?

The business case for teleworkers really evolved, because it started out as I said as a grassroots effort and then it evolved as one that maybe could drive down cost and we could shrink the real estate footprint that we have in the organization because that tends to be very expensive. But what we found out, the real business initiative is that is competitive advantage. It is you know I recognizing that people need to spend a little bit of time in the office before they begin teleworking, It's an opportunity for us to distinguish ourselves from our competitors on one thing that in the future as we move forward, one thing that we may see more of is more supervisors serving in a teleworking capacity right now we only have seven percent of fifteen thousand who're supervisors. It's a respectable number, but if we're going to evolve there may be opportunities for us to think about different types of jobs not than not the traditional teleworking or work at home jobs.

The other thing that I think it's important to consider with teleworking and it's not necessarily what people would think is intuitive. You have to watch the number of hours that people work especially if you have an office at home. I think that people sometimes think, oh they're going to work at home, there's going to be lots of distractions and they may they may not devote as much time as they should to work. When in fact what I find is that they're 24/7. The office is

right there, it becomes so convenient to work. So I think it's important to put some parameters around the time that people are working. You know it's easier to do when you're in the type of job where your time is tracked and you get paid for that tracked time. But when you start to think about supervisors and managers who are teleworkers, it can become this non-ending work arrangement. And what you don't want to do is burn people out.

Pat French - Why does Boeing offer remote work?

Boeing is leveraging telecommuting just like any other industry, any other company out there. Primarily there's four reasons that people leverage telecommuting.

First is pretty obvious, reduction in costs. If you don't have to have a building for these people and they're working at home, you're able to save a lot of money in terms of land and building.

Second, and we hear this a lot in some of our major cities, is the environmental concerns of this. We're able to get cars off the road, reduce our carbon footprint. It's good for communities to have fewer cars on the road and people commuting every day. So if you think of some of our major cities that we're located in, Southern California, Peugeot Sound up in the Seattle area, Washington, D.C., we combine our telecommuting with some of our other offerings, car pools, van pools. We have mass transit tickets that we give to people in some of the major cities. Other things that allow us to do telecommuting is the fact that technology is out there which allows anybody to work from anywhere. If you have a laptop and you can get into your files at work, you can work just about anywhere today.

The third one, and one of the areas that we're facing today quite a bit, is telecommuting strengthens your ability to recruit and retain the next generation of leaders. Boeing has a very mature work force. Our numbers show that within the next five years, about a quarter of our population is eligible to retire, so we're building for the future. So we are recruiting the next generation of leaders. People in the younger generations, particularly Millennials. they appreciate telecommuting and the flexibility that's available to them. We have a lot of two career families, we see a lot within Boeing where someone is in the military, and they're relocated as a part of their military position. And the ability to work at home helps us to retain both employees during this transition time.

And the last area, and this is very strong within the U.S. government which we work a lot with, and that is the continuity of operations. Telecommuting allows you to keep working. So if you think of the U.S. Government, obviously nine eleven was a major impact event for the U.S. Government, but you can think of right now the snowstorms. And I keep hearing there's one coming this way in New York right now. So this snowstorm is coming. What they found in the U.S. government was when these snowstorms hit Washington D.C. some people kept working. And they looked at it and said, what's the difference, these people just keep working and these don't. What they found was, the people who kept working were able to telecommute. They were prepared for this, they knew how to access all of their files and keep working. And so

across the U.S. Government as part of the tele work enhancement act, which was put into place in December of two thousand and ten, the U.S. Government has to enable people to telecommute. And that's the reason, so they can just keep working. That doesn't mean they work from home all the time, but it means they're ready and prepared. So those are the primary reasons that Boeing leverages telecommuting.

Pat French - What are some of the benefits Boeing has experienced with telecommuting?

We have seen a lot of successes in this area. At this time, it's February, now one that comes to my mind is the flu. People with the flu don't come into work, and you don't want them to come into work, but in a lot of cases they are able to continue working. So, if you're able to telecommute, you may not be able to work that entire day. But we've seen a large reduction in sick time as a result of people being able to work from anywhere. Bad weather, as we just addressed. The snow is coming, the snow is coming, people are prepared, they know they can work from home and you have the continuity of operations. We're able to link people from anywhere.

When you look at some of our large programs, Beoing may have people from 12 different sites linked together on a particular program. Being able to telecommute allows you to pull in anybody from anywhere to work on any program. So, you're able to work from any Boeing location; in addition you're able to pull people in who are working at home, so it gives us access to a large population of skilled people. One of the things that I hear a lot from different leaders is, single parents and two-career families. I hear a lot about new mothers who were able to start back to work earlier because they can work from home part of the time, than if they had to come into the facility all the time. That's an area and then military relocations--again, when someone is transferred as part of a military position, we're able to keep the spouse--and in some cases that employee--working from anywhere because we're able to tie in from anyplace.

Transcript: *Assess Remote Work Policy*

When remote work is small and just starting in an organization, informal programs typically work just fine, but as remote work grows, this informality can become a liability. All of a sudden, leaders start complaining because some days the office is empty. They'll ask questions about how many people work remotely. But since it isn't tracked, nobody really knows. Employees start complaining because their co-workers can work remotely, but they can't. They'll ask managers how such decisions are made but it is difficult to answer because there are no formal processes in place.
Remote workers start moving out of the area and sometimes even out of the country, which raises potential legal issues. And employees who were asked to return to the office claim they are being treated unfairly and file discrimination lawsuits.
Unfortunately, there is no formal agreement in place to go back to.

Given these potential regulatory, legal, and fairness issues, it can be helpful to introduce greater structure in the form of formal policies and procedures as remote work programs grow.

There are a number of different kinds of policies and procedures to consider, including agreements that specify the terms and conditions of remote work arrangements, and reimbursement policies that detail the expenses that the company will and will not cover.

For instance, will the company reimburse for the Internet? What kind of furniture can the employee purchase for their home office?

There are also home office guidelines and requirements that we may lay out. For example, the employee may need to have a private and quiet work space. They may need to have a certain level of liability insurance on their home.

And finally, we can think about tools. They can be used to determine whether the employee is eligible to work outside the office and assess whether the person is really a good fit for remote work.

In this topic, we will discuss the elements of a good policy and take a look at some different examples of policies and tools that are being used by organizations today.

Transcript: Develop Good Remote Work Policy

As you work on implementing structure in your organization, it is important to keep in mind a few essential elements of good remote work policies.

First, they should be tailored to specific types of work arrangements. For example, we want to have different agreements for tele-work and flexible work because the eligibility requirements will differ, as will the policy details. We may also want to have different agreements for full-time and part-time tele-work or for different types of flexible work, such as flextime and compressed work week.

There may be some common elements across these different agreements, but there are also likely to be some important differences. For instance, there are often differences on what expenses the organization will reimburse for full-time and part-time teleworkers, as well as the amount that they will reimburse.

Second, the policy should be discussed and agreed upon by both the employee and his or her manager.

It is important that both parties are clear on the terms of their arrangement, such as how long it will last, and also what is required to make changes to it.

Perhaps more importantly, both the employee and their manager need to understand their roles and responsibilities. For example, employees need to understand that telework cannot be used as a substitute for dependent care or other nonbusiness activities.

Managers should also know how to determine whether an employee and the job characteristics meet the requirements for telework, and should understand acceptable methods for monitoring employee performance, such as based on their output generated, not the time

spent on the job.

Finally, policies and agreement should need to be revisited and renewed at least annually and sometimes even more frequently. Doing so creates an opportunity for the manager and the employee to discuss how the arrangement is working and whether changes are needed.
Also, it helps to reinforce that the arrangement is not permanent and that it can be modified or eliminated.

Transcript: *Examples of Remote Work Policy*

Now that we have discussed the importance of having formal policies and procedures and have examined the elements of good policy, let's take a look at some examples. In the PDF handout, you'll find several different examples of remote work policies. These examples are based on actual policies being used by companies that have growing remote work forces.
Thus, these examples can serve as a useful model, as you think about developing policies and procedures for your own organization.
As you examine this document, you will see several of the elements that we have discussed as being essential to good policies.

First, there are different policies and procedures for different types of remote work arrangements, including flextime, compressed work week, telework, and so on. The policies all cover a similar set of topics, including the purpose of the policy, the definition of the work arrangement, eligibility requirements, and the discussion of roles and responsibilities. Yet, the content covered in each of these sections differs depending on the specific work arrangement. For example, the policy for compressed work week specifies the two schedule options that are available to employees, and the teleworking policy specifies the qualifications that must be met for an employee to work outside the office.
Some of the policies go a step further, and actually include information on how procedures vary across different work arrangements. For instance, the home office guidelines provides a matrix that shows different policies that are applied to those who are home officing, as compared to those who are engaged in a flexible work arrangement.
The policy also helps employees to determine which arrangement applies to them depending on whether there is a business-driven need for the home office.

Second, you'll notice that the policies outline the roles and responsibilities of different stakeholders, including the employees, managers, and human resources. We often make the mistake of assuming that it is the sole responsibility of managers to review, approve, and enforce the policies we have surrounding remote work.
As we discussed earlier, it is important to create mutual accountability among both managers and their employees. Thus, managers should review the policy with their employees and make sure that the roles and responsibilities of each party are clear and mutually agreed upon.

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Third, a number of the policies include information on the duration of the work arrangement, as well as how often it needs to be reviewed.

It is common to see language that states that the arrangement can be revised or ended at any time. Some organizations, however, have a specific cancellation process that must be used to terminate the arrangement. In such cases, it is important to make both managers and employees aware of the steps that need to be followed to alter or end the arrangement.

In terms of review, we may state that the arrangement should be reviewed after a specific period of time, such as six months or a year, or we can specify that the arrangement will be formally reviewed at the same time as the employee's scheduled performance reviews. Specific timing is less important than making it clear at the outset that the arrangement will be subjected to regular review and assessment that could lead to changes or cancellations.

The final comment I want to make is that as you review these policies, I would like you to notice not only the similarities across the policies but also some of the differences.

Remote work practices are going to vary from organization to organization, as do the specific current concerns and considerations of key stake holders. Thus, it is important to avoid a one-size-fits-all approach and to recognize that you need to create policies and procedures that are appropriate for your organization.

You'll want to make sure that the policies fit your remote work practices and that they are consistent with other human resource policies within the organization. Thus, the examples in this document can serve as a useful starting point as you begin to develop your own policies or as a useful check on the policies that you may already have. But it will be important to tailor the policies to the unique aspects of remote work in your organization.

Transcript: Implement: Putting Policy into Practice

As you work to put your policies into practice, it is likely that you'll face some challenges. One of the most common is inconsistent application of the policy. Typically, organizations require employees who work at least one day a week outside the office to complete a formal remote work agreement.

However, this isn't always followed, which results in some employees working remotely without a formal agreement or contract. One way to address this is to require that the agreement be completed before an employee can be enrolled in the program, or have their work arrangement changed in the organization's HR information system. You may also encounter managers who disregard the policies or guidelines. For instance, a manager may deny an employee's request for telework even though the employee meets the eligibility requirements and is a good candidate for remote work.

As we discussed in the first module, it can be helpful to have an advisory group that will review these cases and try to work with the manager to resolve the situation.

Ultimately, it is important to view these policies, agreements, and guidelines as living documents that will need to be regularly reviewed and adapted over time, to make sure they

stay relevant and to ensure they support, rather than unduly constrain or limit, remote work in your organization.

Transcript: *Remote Work Fit Assessment*

It should now be clear there are many different issues that need to be considered when evaluating whether remote work is a good fit in determining if it should be adopted in a specific situation. To help guide you in making this assessment we've created a sample fit-assessment tool that you can use to think through these issues and evaluate whether remote work is a good fit for a particular employee, job, and business situation.
Let me walk you through the different parts of this tool and explain how it can be used.

This tool is designed to be completed by supervisors to assist them in determining whether an employee in their work group is a good fit for remote work.
The first part of the tool assesses the employee's characteristics and whether they are a good match for remote work. The supervisor rates the employee on the criteria that we discussed earlier, such as whether the employee is self-motivated, disciplined, results-oriented, adaptable, and technologically competent.
In addition to providing a rating on each of these dimensions, the supervisor should be encouraged to record specific behavioral examples or explanations to support their ratings. The process of generating behavioral examples helps improve the accuracy or validity of the ratings. In addition, these comments can serve as valuable input for feedback and coaching.
The supervisor is then asked to consider logistical issues, specifically whether the employee has a suitable alternative work location, and to confirm that the employee meets the eligibility and performance requirements specified by the organization's remote work policies.
All told, this first part of the assessment helps the supervisor to determine whether the employee is a good fit for remote work and to identify potential obstacles or barriers the employee will need to overcome as they transition to a remote work arrangement.

The second part of the tool helps the supervisor evaluate whether the job is a good fit for remote work.
The questions ask the supervisor to consider whether the primary duties of the job can reasonably be performed in a remote environment, and whether the employee's work location provides an environment that's conducive to the requirements of the job.

The third part of the tool has the supervisor evaluate how the remote work arrangement supports critical business needs such as business continuity, customer service, productivity and cost reduction as well as how to alliance with important work force strategies.
The tool also helps the supervisor to consider whether the remote work arrangement introduces any potential risk to the business, such as those that may stem from privacy, legal, compliance, or other regulatory requirements.
These questions are important because they force the supervisor to consider the business case

for the remote work arrangement. Both the employee and the job may be a good fit, but if there is not a strong business case for remote work it may not make sense to move ahead with the arrangement.

The final question on the tool asks the supervisor to indicate whether he or she supports the employee's request. If the supervisor indicates no, then he or she should be asked to explain the reasons for not supporting it.

One final note is that part of the assessment focusing on the employee fit should be completed by not only the manager but also the employee him- or herself; that is, there should be a shorter questionnaire that employees complete to self-assess whether they possess the characteristics necessary to work remotely. And supervisors and employees should meet to compare their responses and honestly discuss any differences of opinion.

Having the employee conduct a self-assessment is an excellent way to help the employee understand the expectations that are associated with remote work and how different personal attributes may represent strengths and also challenges in the new environment. It also provides an opportunity for the employee to address potential misconceptions held by the supervisor. For example, a supervisor may believe that an employee will struggle to adjust to the relative isolation of working from home.

If the employee disagrees, he or she can make a case for why telework should be a good fit both personally and professionally.

Finally, it can serve as a springboard for the supervisor to provide the employee with feedback and coaching that will facilitate a more successful transition to the remote work arrangement.

Transcript: *Employee Fit*

The first thing we'll want to assess is whether the employee is a good fit for remote work. There are several different criteria that can be used to make this judgment.

First, we want to look at the employee's past experience and performance.
Most organizations require employees to work onsite for at least six months to a year before working remotely. This allows the employee to become fully proficient in the job, learn company policies and procedures, and build a strong social network.
We also want to look at the employee's past performance. Most organizations require, at a minimum, that the employee consistently meets performance expectations for the position. They also want to make sure that the person has not been on a performance-improvement plan within the past six months or a year.

Second, we want to consider the employee's personal attributes and whether they are a good match for remote work.
For example, we might evaluate whether the employee is self-motivated and self-disciplined. Can they work independently with little supervision? Does the employee

demonstrate strong organizational skills and use their time efficiently? Is the employee results-oriented? Will they be able to remain focused on their work if working outside the office? Also, is the employee flexible?

Do they understand that they may be asked, with adequate notice, to modify their schedule to meet business needs? Is the employee proficient at using computers and other forms of technology?

These are just a few of the attributes that may be important, but it's really important to look at whether employee's qualities and personality are a good fit for remote work.

Finally, you'll want to consider logistical considerations having to do with whether the employee has an appropriate alternative work location.

Do they have a safe, comfortable work space that is free of noise and distractions? Do they have the required level of security? And do they have access to the necessary technologies, such as a broadband Internet connection?

By looking at the employee's performance and personal attributes, and also taking into account some of these logistical considerations, we can ensure that our employees are a good fit for remote work.

Transcript: *Job Fit*

The second set of criteria examines whether the job itself is a good fit for remote work.

First, it will be important to evaluate whether the primary duties or tasks of the role can be done in a remote environment. For example, how much face-to-face interaction is required to perform these duties -- if high perhaps remote work isn't the right fit? Can the major duties also be performed with reasonable technology tools that won't add a lot of additional expense to the organization?

In addition, you should consider whether the job results in a work product that can be easily monitored and measured. Traditional means of measuring employee performance, such as the time spent on the job, may not be available in the remote environment.

Finally, if the job has specific environmental requirements, such as no background noise, it will be important to confirm that the employee's remote work location can provide this.

So in sum, we want to look at not only the employee but also the job to make sure that the duties and responsibilities and the environmental conditions that are needed are a good fit for remote work.

Transcript: Business / Team Fit

The third and perhaps most important area to evaluate is whether remote work is a good fit for the business. Ultimately decisions about whether an employee should work remotely should be based on the needs of the business and the impact the remote work will have on clients or other team members.
To this end there are a number of issues that warrant consideration.

First, it will be important to evaluate how the remote work arrangement helps to satisfy different business needs.
Does the arrangement help to sustain or improve business continuity, customer service, or productivity? Is your business growing such that you are recruiting more people than you currently have physical space for? Does the arrangement support a pending site closure or a real estate consolidation? Or maybe the work arrangement helps to support your work force strategies, such as recruiting or retaining key talent?
In essence, you should think back to the business and human capital drivers we reviewed in Module 1 and consider how the remote work arrangement supports these capabilities.

In addition to considering how the arrangement supports critical business needs, you should also evaluate the potential risks to the business that might arise.
Are there privacy, legal, compliance, or other regulatory requirements that might prevent an employee from being able to work outside the office? Does a remote work arrangement violate contractual obligations with customers or clients, or could it lead to disruptions in customer service? Would the remote work arrangement have a negative impact on the ability of other team members to effectively perform their duties? And finally, does a remote work arrangement create unreasonable increases in costs or expenses, such as those having to do with technology?

In summary, it will be important to assess whether the remote work arrangement satisfies important business needs without creating unnecessary risks or liabilities.

Transcript: Issues in Transitioning from Traditional to Remote Work

Research has found that remote work can enhance employees' feelings of autonomy and empowerment, which, in turn, can lead to higher levels of employee satifaction and performance. However, there's also some evidence that this autonomy can serve as a double-

edged sword. Rather than empowering employees it can leave them feeling isolated and helpless.

In a study we conducted with companies that are part of the Cornell Center for Advanced Human Resource Studies, we found that two-thirds of the companies did not view isolation as a major issue with their remote employees. In those companies where employees have complained of feeling isolated, typically the problem has been addressed by having the employees return to a non-remote work arrangement for one to three days a week. Although these findings seem to suggest that isolation may not be a pervasive problem among remote workers, I think there are several reasons this issue warrants our attention.

One reason we may not have found a high incidence of isolation in our project is that most of the companies we studied utilized part-time, rather than full-time remote work arrangements. Thus, most remote workers were in the office at least a few days a week, which gave them that opportunity to connect with their supervisors and coworkers. However, when employees are working from home on a full-time basis, they lose this face to face contact with their coworkers which may increase the likelihood that they will feel isolated.

Also, I would note that in many of the companies we studied, incidents of isolation were only identified when employees brought it to the attention of their manager and requested a change in their work status. Thus, it is likely that there are other workers who feel isolated, but don't report the issue because they want or need to maintain the remote work arrangement. I may feel isolated, but choose to continue working remotely because of other benefits that it offers. In short, what we found in the companies we studied may be somewhat misleading and may not fully capture the scope of this issue.

There are a number of reasons why remote workers may feel psychologically isolated and become less engaged, but the primary one is that their interactions with coworkers and supervisors tend to be less frequent as well as less rich. Remote workers are forced to rely on technology-mediated communication which often lacks the non-verbal cues that are important for building trust and personal connections.

In addition, we know that when individuals communicate through technology their interactions are often much more likely to be task- rather than socially-focused. That is, most communication centers on the work at hand rather than on building personal relationships. This can further undermine the development of trust and make it difficult to identify with the other members of one's work group. Accordingly, as individuals transition from traditional to remote work, we need to think about how to prevent isolation and keep these individuals engaged.

Transcript: *Strategies to Address Issues*

One strategy is to require individuals to work in the office for six months to a year before they transition to a remote work arrangement. This allows the employee to understand the culture of the organization and develop relationships with their supervisor and teammates, both of which they can draw upon later to keep them connected. In fact, I have come across very few organizations that hire individuals directly into remote work assignments. Usually this is only done in special circumstances where it is impossible to have someone first work on site for certain jobs, or being used in certain jobs such as sales where individuals are already accustomed to working remotely.

In addition to having people spend some time working in the office, we can use other strategies to facilitate social connections. One is to require face to face visits. For example, the employee may be required to come in a day or two every quarter so they can renew their connections and stay in touch with what is happening in the office.

We can also utilize technologies to allow for richer social interactions. We'll be talking more about technology later in this module, but I'll note here that organizations are increasingly utilizing webcams and video conference to allow individuals to convey those nonverbal cues in their communications and also to help create a sense of presence that can facilitate that relationship-building. Also, instant messaging and social networking applications can be used to facilitate more informal or spontaneous interactions. For example, employees can use instant messaging to share those "aha" or "oh no" moments with their team members, which may seem less appropriate if delivered through more formal channels such as email.

It is also important to think about not only what communication channels to use but also strategies that we can embed within them to keep employees connected and engaged. For example, a virtual team that I once worked with had each member create a picture collage or what they called a "personal panorama." At the beginning of each team meeting, one of the team members would share their panorama and tell the story behind each of their pictures. This enabled team members to get to know one another on a more personal level and to recognize different connections that may not have been visible through their more task-focused interactions. Other teams have members simply share a photo of themselves or to talk about recent events in their location.Although the specific strategies will vary, they share a similar aim in creating social connections that build team identity and combat that personal isolation.

A somewhat different approach is to provide remote workers with formal support mechanisms. One common strategy is to create virtual buddy systems.Remote workers are paired with not only other remote workers but also traditional employees working in the office. The remote buddy can help the employee work through different challenges they may

face as they transition to working outside the office while the traditional buddy can help the remote workers stay connected to the latest news and happenings within the office. Although they serve different functions, both types of buddies can be valuable.

Along these lines we can also create employee resource groups and other forums for remote workers to connect.These forums can be used simply for social interaction but they can also be used to share resources such as tips and strategies for dealing with the unique challenges that arise when working outside the office.

Finally, as we will discuss more in Module 3, it's important to measure and monitor remote worker engagement. Are these workers as engaged as our traditional employees? Do they feel isolated or disconnected from others? By regularly checking in with our remote employees we can catch the problems early and take steps to intervene.

In sum, we need to be cognizant of the fact that our remote workers face a greater risk of feeling isolated and disconnected from their supervisors, co-workers, and the organization. We can prevent isolation by helping our remote workers to develop strong social networks and by providing support in the form of buddy systems, resource sites, and communities.

Transcript: *Configuration Matters*

As we start to think about how to organize or structure remote work, there's a number of issues that we need to think about. Typically, we think about where people are located. How far apart are they? How many different time zones do they cross?
One issue that we haven't given a lot of attention to, but we are starting to realize that may really matter, is the configuration of how we put employees at different locations, at how we distribute them.

In this figure, I show three different configurations of an eight-person virtual team or remote work force, and let me highlight a couple of differences across these three configurations.
In configuration A, we basically have two employees at four different sites. So we have what we call a "balanced subgroup" design. We have the same number of employees spread evenly across these four different locations.
Figure B shows a similar but slightly different configuration, where we have one fewer site, so we have more employees at one site, four, and then two at some other locations.
So, here we have what we call an "unbalanced subgroup design." In figure C, we have what we often refer to as a "hub-and-satellite design," where we have a core group of employees at one location and then one or two workers working remotely and connecting into the main group.

As we think about these different designs, there's a few things to keep in mind.
One thing we need to recognize is that the number of sites matters. The more sites we have, the more challenging it can be for employees to coordinate and communicate with one

another.

We also need to realize that the imbalance between subgroups matters. If you think about those three different designs, the most challenging one for team coordination, creating a team identity, creating trust within the team, is really that configuration B. Because there, we have subgroups where members might identify with those who they work most closely with rather than the overall team, but in addition, we have one group that is larger and potentially more powerful than the other subgroups.

The third issue we need to pay attention to is the isolation of individual members. For a long time, we thought that having those satellite members was the worst configuration of virtual work, but in fact, we are learning that as long as we don't forget about those individuals and incorporate them into our discussions and work, they can actually be very valuable to our teams and groups. Those individuals can provide an outside, unbiased perspective that may be missing within the group itself or the core group. They can also serve in a devil's advocate role, challenging the thinking that may be going on within the core group.

So, why do we care about these issues?

Well again, they can truly significantly impact the interpersonal dynamics within teams. Those subgroup configurations will face unique challenges, particularly when the subgroups are imbalanced, and having isolates can actually help our groups perform more effectively and can infuse new ideas and challenge thinking in our groups.

So, what are some of the lessons that you can take away from this for your organization?

Well, one, obviously, is to pay attention to these configurational issues when you are structuring your remote work.

You know, one is to try to limit the total number of sites. In general, what we found is that when you get above five or six sites, that really presents a lot of challenges for communication and coordination.

It's not always possible to keep the number of sites down below that level, but if it is, certainly that's likely to enhance the functioning and dynamics within those groups.

Also, try to avoid subgroups, and particularly creating severely imbalanced subgroups, when you are likely to have a more powerful majority and a smaller minority that may be marginalized.

In addition, you should think about how can you proactively address some of the potential issues that may stem from imbalance or isolation, because it's not always possible to design these configurations in a way that might be most optimal.

One thing I have seen some organizations do, for example, when they have those hub- and-satellite configurations, is actually make all members of the team take calls from their offices. That way you don't have a core group that is sitting around the table having side conversations and potentially forgetting about those team members that are out there in the virtual world. So by having all the members take calls from their offices, it kind of levels the playing field.

We've also seen corporations such as Microsoft experimenting with different technologies that really helps to create a virtual presence of those remote members in the team--creating a

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monitor where the person is actually sitting at the table in a virtual sense, so again we don't forget about that person and we make sure to incorporate them into our team activities.

Transcript: *Ask the Expert: Bob Rogers*

What resources have you found most helpful for preparing employees and managers for remote work?

The types of training and resources that are required for a telework arrangement are fairly basic, but really essential and should not be overlooked.
So for example, really very solid employee on-boarding and orientation are essential. And so, for that reason, some organizations do not hire employees into telework arrangements, require employees to work in the office for a set period of time. Sometimes up to a year, before they would even consider them for a move to telework.

But one of the other factors to focus on is that the normal cues that would occur in an office environment and are not typically present in a remote setting, especially working from home. So, it's simple cues when to start work and when to end work are missing and so need to be built into a routine through some method of training and communication, so how to build and establish a schedule for yourself, how to avoid interruptions and disruptions to your work, you know simple things like putting a note on the door so neighbors don't come to invite you out for coffee.
All are types of, sort of common sense type of work habits that employees and their managers need to become aware of. And share some training in order to support the teleworker. Employee resource groups can also be a really effective way to deliver these.

An employee resource group allows an opportunity for employees in similar situations, say work at home to share best practices, share those examples of things that have happened and how they address them or to participate in ongoing training as a group that helps them become more effective over time.

What kinds of requests for remote work have you handled?

I've seen several examples of unique requests from either employees or their managers to set up tele-work arrangements. Some are, that were able to be accommodated and, and others not. But they required some thinking and planning.
So for example it's, it's not unusual to see employees whose families have vacation homes. That you know, the family moves to the vacation home for the entire summer, even though the employee is really only planning to take a couple of weeks off during the summer. And so, they moved to that home and they setup a tele-work arrangement in that location for the period of time that the family is away.

I've also seen accommodations made for employees in disaster situations where homes are flooded. Or I remember a case where an employee's home was burned and completely destroyed. And had to relocate with family to a location that was just not convenient for them to be able to commute to an office.
And so we're able to setup-tele work arrangement that allowed them to work from the home that they were in for a months it would take to get their homes back in order, and for them to move back to you know, their own home.

But I've also seen some that were more difficult and, and maybe not able to accommodate. An example comes to mind of actually a couple of employees who were looking to move to you know, their, the locations outside of the country.
And as we tried to set those arrangements up, found that if the company was not licensed to do business there, there were challenges in actually providing payroll and benefits in those locations. They were just not able to make arrangements for it, and so we weren't able to accommodate those transfers.

What did you consider when determining if remote work was a good fit?

One of the approaches that we used to help determine whether telework was an appropriate fit or not is what we refer to as a, three legged stool. And that is, the job itself an, an appropriate job? Can the work actually be done in a remote setting?
The second leg of that stool, if you will, is the employee's performance and their skills. Would they be successful in performing that work, in a remote environment?
And the third is, the remote environment itself. If the employee is going to be working at home, will it be working in a setting that is safe, appropriate, terms of quiet and, the ability to protect confidential information. Whatever is essential in a work environment for the employee needs to be present in the home environment.

One of the things that we created was a tool to help managers walk through that assessment. A simple spreadsheet with some algorithms built in that walks the manager through some questions around each of those three-legged stools and then returns to the manager an assessment of the level of risk involved with moving the employee to the telework arrangement, either because of the type of work. The employee skills and performance, or the work environment itself, and then, gives the manager some guidance on where to go to help either resolve those or make a decision, about whether the arrangement should move forward or not.

What are some key steps to include in the implementation plan for remote work?

The key steps that we've used in implementing successful tele-work programs include, first of all the creation of a robust cross functional team to bring all the different aspects together that are essential for putting a program together.

So of course, human resources and IT would be a part of that team in order to make sure that the policies and practices are in place to be able to move employees into a program. But also

that the technology is there to make sure that they're supported and able to complete the work that they have to do in a remote setting.

But also functions such as a legal representation, communications, perhaps budgeting and finance to help make sure that everything is placed to get the tools, resources in place for employees. That the different legal implications and different geographic locations that might need to be looked at.

And that we're communicating effectively, both with employees and managers and other stakeholders who might have an interest in what the organization is doing.

Another key step in in implementing a successful program is specifically defining what workplace models are for the organization.

There's different terminology that is commonly used, and it's used interchangeably, it's not well defined. Work terms like tele-work and work at home, and telecommute are used interchangeably and are not specifically defined. The organization needs to do that, to define exactly what the terms mean, terms that make sense for what the, what the program is trying to accomplish. Define those and then socialize those so that the, those, so that the organization is using consistent terminology when they're referring to employees or the program itself.

And then, if you're able to build those definitions into whatever employee database the organization uses, whether it's PeopleSoft or some other form of employee database, to define workplace models for each employee in that database. That allows the organization to measure the impact for each of the different workplace models the organization has.

Anything that the organization is able to measure for its employees, they would be able to filter down and see how that's represented by employees in different workplace models. Help you be able to assess what's working, what's not working and even drill down on some of those causes might be.

Transcript: *Assess Competencies for Remote Leadership*

Through my work in this area I've come across two main perspectives on leadership in remote work environments.

Some argue that remote leadership requires the same competencies and behaviors as more traditional forms of leadership. The thinking here is that what defines good leaders doesn't really change as we move from traditional to remote work arrangements.

A second perspective is that remote work environments require an entirely different approach to leadership; that is, our traditional models no longer apply when leading from a distance.

In reality the truth likely lies somewhere in between these two perspectives--a number of the competencies that have been identified as critical to leading remote employees could be argued as important for leadership in any context. For example, a 2008 report by the Conference Board on managing the challenges of a dispersed work force identified three competencies that result in the most highly engaged distance employees.

The first was cultivating relationships. Remote managers need to communicate frequently, focus on relationships, and promote a climate of inclusion. In addition, they should encourage collaboration and ensure employees have the support that they need to be successful.
The second key competency was focusing on outcomes.
The remote manager needs to make sure employees have clear individual goals that are tied to the organization's and the manager's own goals. At the same time the remote employee should be given autonomy to determine the best way to perform their duties.
And the third competency was developing employees, which means frequently assessing employee performance, providing feedback, addressing performance issues, and delivering coaching. The remote manager also needs to foster career development, ensure the employee remains visible in the organization, and advocate for the employee to receive assignments and opportunities that are critical to advancement.

Although it is true that these three competencies are important elements of leadership in any context, how the specific behaviors that underlie each are performed in remote work environments may be somewhat unique.
The most obvious example is in the area of communication. Remote managers need to be more flexible in when and how they communicate. Some employees may prefer to connect through instant messaging, while others want to talk over the phone.
Managers who adopt a stringent communication protocol may risk alienating some of their reports. The more flexible managers can be in how they communicate, the more frequently they will be able to connect with all members of their team.
Another example is in terms of goal-setting. Remote managers need to make sure employees have clear goals, just like more traditional managers do.
However, in the remote environment it's essential to make sure that employee goals are tied to objective results that are easily observable. Evaluating employees on more subjective criteria will be difficult or impossible in the remote environment.

In summary, the truth is that leading remote employees is in many ways very similar to leading co-located employees in that many of the same core competencies apply. However, there are also differences in how remote leaders execute these competencies, and also in how they manage some of the unique elements of remote work arrangements.Later in this topic we will explore some of these differences more closely.

Transcript: *Communication*

So let's take a look at how different leadership behaviors need to be adapted as we move to the remote work environment, starting with communication. Communication is particularly important because it is a key mechanism through which remote managers cultivate relationships with their reports.

There are a few different dimensions of communication that are important to consider.

The first is frequency.
Remote managers need to communicate frequently with their employees to share information, monitor employee performance, and make sure the employee knows they're available to help them.
The second dimension is the mode of communication.
As noted earlier, remote managers need to be flexible in how they communicate with their employees. Employees will prefer different communication tools, and managers who can adapt to these preferences will be able to connect with their employees more often.
In addition, remote managers need to make the most use of the communication tools available to them and be able to choose the right tool for the right situation.
A third dimension is clarity.
Remote managers need to provide clear direction and goals. In addition, they should practice closed-loop communication, which involves following up with employees to ensure that important information is both received and understood. It is easy for messages to be misinterpreted in virtual settings, and thus clarity is essential to effective communication in these environments.
The fourth dimension that's important is structure.
For example, a recent report by the Society for Human Resource Management provides a list of nine different tips for running effective virtual meetings. For example, one tip is to prepare and distribute agendas in advance, and ensure that the agendas reflect input requested from the participants.
Another is to initiate meetings with a roll call of all participants and to review the agenda, meeting objectives, and time frame.
The report also suggests that it's important to create facilitator and scribe roles to encourage every attendee to participate and to set follow-up assignments at the end of the meeting. As you can see, these tips focus largely on creating a virtual meeting structure that will enhance participation and lead to more effective communication.
A final aspect of communication that is commonly forgotten but potentially most valuable is the remote leader's ability to listen and hear what cannot be seen.

Four different types of awareness can be important to effectively managing remote employees or teams.
The first is activity awareness, which includes an awareness of employees and their work activities.
The second is availability awareness, which is knowing employees' schedules.
Process awareness is the third type, and it involves understanding how individual employees' tasks need to be sequenced and how they fit into an overall project.
Finally, there is social awareness, which includes knowledge about employees and their social environment.

In summary, communication is critical to managing in virtual environments.

To be effective, remote leaders need to focus on the frequency, mode, clarity, and structure of communication while also maintaining high levels of situational awareness.

Transcript: *Coaching*

A second area of leadership we can examine involves the role of the leader as the coach. As I noted earlier, research by the Conference Board found that dispersed employees need clear goals and objectives, but also need to be given the autonomy to decide how best to get their work done. This suggests that remote managers need to adopt an approach that's focused more on coaching than commanding control.

A similar finding has been uncovered in research on virtual teams. Specifically, researchers found that as the level of virtuality increases, so should the level of empowerment. Empowerment is critical because it fosters a sense of trust and mutual accountability among team members--two essential ingredients for effective team process in virtual environments.

At first glance, the idea of empowering remote workers can seem counter-intuitive. Our gut reaction is often that we need greater oversight and control over these employees. However, to do so would be to destroy one of the great benefits of remote work, which is that it enhances employees' feelings of autonomy, which in turn leads to improved employee attitudes and engagement and can lead to higher levels of performance.

Rather, what we need to recognize is that support is still needed, but in different ways. For example, my colleagues and I recently studied remote leaders and their followers in a large multinational organization and examined how distance impacts the effectiveness of different leader behaviors. What we found is that as distance between the leader and the follower increases, certain leader behaviors, such as providing emotional support, become more important, while others, such as helping the employees solve problems, become less important. That is, the effective remote managers were those who provided their employees with high levels of emotional and social support and looked after their well-being, more so than those who were stepping in to solve their employees' work problems.

Ultimately, remote managers need to understand the importance of providing direction and support while also giving their employees the freedom to exercise the autonomy and flexibility afforded by their work arrangement.

Transcript: *Focus on Results*

As noted earlier, a survey conducted by the Conference Board identified focusing on outcomes as one of the three key leadership competencies that result in the most highly engaged distance employees.

So what exactly does it mean to focus on outcomes, and what are some of the implications for remote leaders?

The first implication is that remote managers need to make sure employees have clear individual goals and that those goals should be tied to the organization's and manager's own goals; that is, remote employees should clearly understand what is expected of them and how their performance will be evaluated, and they should also have a clear line of sight between their performance and that of their team and the organization.

The second and perhaps most important implication is that the focus should be shifted from how remote employees achieve results to what they achieve. This means giving remote employees autonomy to determine the best way to perform their duties and evaluating employees based on results.

That is the basic idea behind the results-only work environment, or ROWE, strategy that was pioneered by Cali Ressler and Jody Thompson at Best Buy and has since been adopted by other companies such as at Gap.

In ROWE, employees are evaluated based on whether or not they meet their goals, not how many hours they work. Even in those companies that haven't formally adopted ROWE, remote work often necessitates that leaders focus more attention on their employees' results.

For companies that already have results-oriented performance management processes in place, this may not be a dramatic change, yet applying it to remote workers does present a few challenges.

Although results become primary, there's often the desire to continue monitoring employee behaviors to make sure they're living the values of the organization. In many cases managers cannot directly observe their remote workers, so behavioral information may need to be gathered from multiple sources, including vendors, partners, and customers. Some companies send out formal feedback requests to those who regularly interact with remote workers, using the information for development and evaluation.

It can also be difficult to change the culture of an organization to one that truly emphasizes results, particularly if it has historically rewarded presence more than performance. Managers, for example, may continue to evaluate employees based on their availability and accessibility. When this happens, the manager should be asked to explain how it impacts the employee's deliverables.

In extreme cases employees can be asked to return to the office because their managers do not think they're actually working. This tends to be less of a problem with nonexempt employees because performance metrics are readily available. However, for exempt employees performance can be more difficult to track.

This underscores the importance of setting clearly defined goals that can be used to assess the performance of remote employees.

In sum, managers of dispersed employees need to set clear expectations and need to shift their

attention from how employees achieve their results to what they are actually achieving. This can sometimes be a difficult transition, but it's also one that can be aided by training managers to set clear and specific goals and also holding them accountable for implementing a results-centric performance management process.

Transcript: *Team Development*

Despite the many advantages that remote work offers, one of the clear challenges it presents is in terms of team dynamics. Research has found that virtual teams often experience lower levels of cohesion and trust than co-located teams.
This is due to several factors.

One is that the physical disconnectedness of team members limits nonverbal cues during communication, which we know are important for trust-building. In addition, virtual teams often have a shorter life cycle than more traditional teams, which means that there's simply less time for trust to develop naturally within the team as team members interact and get to know one another.
Despite these challenges, trust is critical in virtual settings because it can help to neutralize the adverse impact that geographic dispersion or distribution can have on psychological intimacy.
It is for this reason that trust is often called the "glue" of the global workplace. In the absence of direct interaction, it is a bond that connects members, and has been shown to improve job satisfaction as well as working relationships in global virtual teams.
Thus, one of the key responsibilities of remote managers is to develop trust and cohesion in the teams that they lead. Most experts suggest that if possible, leaders should hold a face-to-face kickoff meeting when the team is first forming.
In many ways there's simply no substitute for face-to-face interaction when it comes to building trust, and a kickoff meeting can also be used to set team goals, clarify roles and functions, and develop general rules for teamwork, essentially putting structures into place that can help guide the team as it moves forward.

However, a face-to-face get-together isn't always feasible, so remote managers must often find other ways to develop their teams. One tactic is to support the development of what we call "swift trust."
Because virtual teams are often formed for short periods of time and members have little prior contact with one another, trust often forms quickly based on the perceived integrity of other members. However, this swift trust tends to be both temporal and very fragile and is thus very easy to lose. But it can be resilient enough to extend through the life of the group if it's reinforced and further developed over time.
Managers can also support the development of swift trust by promoting early communication and relationship-building activities among team members. For example, having members share pictures or biographies can help build trust.
Also, members should advertise met commitments and celebrate both individual and team

accomplishments.

Advertising individual accomplishments allows members to see that others on the team are dependable and can be counted on and advertising team accomplishments helps to build a sense of group pride, which is an important element of team cohesion.

In addition to building trust, it is important for remote managers to help their teams develop a collective identity.

Collective team identity is a value and emotional significance that members of a group attach to their membership in that group. In short, it is the feeling that one is part of the group and is really committed to the goals or mission of the group.

Collective team identification can be difficult to develop in virtual teams, because when team members are dispersed, they have a tendency to focus on individual priorities rather than team objectives and may not really have that same sense of being part of a team.

This is particularly true when there are high levels of diversity in the team. Members may affiliate more with their expertise or functional background or their cultural background more than that of the team.

To build team identity is important for leaders to develop bridges that connect diverse team members.

For example, leaders can emphasize a high- level identity or what sometimes is called a "third culture." At IBM all team members, regardless of their functional or cultural background, share the same identity as an IBMer, so in many ways that's the third culture in IBM, those shared values that everyone in the organization believes in and abides by.

Similarly, leaders can establish superordinate goals. At the World Bank, for example, team members share an overarching goal of working to end poverty, again something that connects all members regardless of where they come from in the organization or what their background may be.

In summary, high levels of virtuality can present a challenge to building effective teams. However, leaders can overcome this challenge by focusing on building trust and collective team identification, particularly during the early stages of a team's time together.

Transcript: *Adjust Leadership Roles*

Now that we have discussed some of the specific changes that leaders face when managing in a virtual environment, let's consider more broadly how this impacts the roles and responsibilities of leaders.

In virtual settings, there will be some leadership roles, such as that of gatekeeper and recorder, that will often be fulfilled by technology. However, there are a number of roles that remain critical or actually maybe even more critical than in more traditional environments.

In general these roles emphasize the need of the remote leader to shift from a hierarchical top-down style of leadership to one in which leadership is shared within the team. For example, the first important role is that of a team liaison.

Virtual leaders need to continually scan the environment, recognize needs within their team, and manage the boundary between the team and the larger organization. As team liaison, leaders need to advocate for external support, help the team develop political awareness and help members build social capital with key stakeholders throughout the organization.

The second key role is direction-setter. Remote leaders need to ensure that there are clear goals that are shared within the team. In addition, they need to make sure that members see the connections between their tasks and the team's goals and strategies.

Finally, they need to serve as operational coordinator. They need to identify the right resources to tackle problems and ensure the team has access to those resources. Many leaders make the mistake of withholding resources from the team because they feel they haven't learned how to effectively manage them.

However, not providing the team with essential resources can by itself prevent a team from becoming self-managing.

As operational coordinator, leaders also need to motivate and empower employees to encourage greater effort and minimize process loss. They need to provide queues that the team is responsible for managing itself, such as rewarding the team for taking initiative in solving their own problems. They also need to facilitate problem-solving discussions without imposing their own view of the situation.

To perform these roles, remote leaders need a specific set of competencies and personal attributes.

We have touched upon some of the key competencies that remote leaders need, such as the ability to communicate effectively, cultivate relationships, create inclusive environments, and to set direction. But what about the personal attributes?

Here the focus is on qualities that enable leaders to function effectively across different cultures, such as being open-minded and flexible, as well as qualities that help them to manage the complexity and fast pace of global virtual teams such as resiliency and energy.

We'll revisit some of these qualities in more detail shortly when we discuss the importance of cross-cultural competence for effective virtual leadership.

Transcript: *Work Across Cultures*

Given the geographical dispersion of remote employees, leaders often face the challenge of managing employees with different cultural backgrounds. If not properly managed, cross-cultural issues can lead to frustration, confusion, and mistaken assumptions. Thus, now more than ever it is important for remote leaders to possess cross-cultural competence.

There are two contrasting perspectives on cross-cultural competence.

The first focuses on what we call "culture-specific" competencies. This perspective suggests that to work in another culture a person must understand the values, beliefs, norms, practices and behaviors, and also the language of that culture.

The second perspective is different in that it focuses on "culture-generic" competencies, or those competencies that are not tied to a specific culture, but rather enable someone to effectively adapt or move across different cultural settings. Sometimes this perspective is referred to as "cultural intelligence," and some of the competencies that fit within this perspective include self-monitoring, self-confidence, perspective-taking, persistence, and personality traits such as openness and flexibility.

Historically our focus has been on culture-specific competencies, but in recent years the culture-generic perspective has been gaining popularity. One reason is that by possessing cultural intelligence, leaders are often better able to learn the culture-specific aspects, and to do so on the fly. In addition, we know that most cultures are not monolithic. For example, what Chinese culture means is going to differ a great deal depending on whether we're in Shanghai or one of the rural countryside towns.

Cultural intelligence helps leaders recognize and adapt to these types of differences that exist within a particular cultural setting.

Finally, because global leaders are being moved more frequently from one location to the next or are being asked to manage individuals drawn from many different cultures, it's more important for them to be flexible and adaptable than to be a deep expert in a specific culture.

Preparing leaders to handle these challenges is a two-stage process, consisting of assessment and development.

Assessment serves several purposes. First, it allows us to identify individuals who have the potential to be effective global leaders. By identifying these individuals early we can provide them with the developmental opportunities that will build their cultural intelligence over time. Second, assessment helps us to identify the competency gaps that need to be addressed among specific individuals or perhaps our leadership population at large, and therefore facilitates developmental planning.

Finally, assessment can be done at the team level to help leaders and team members recognize the cross-cultural differences that exist within the group and to understand some of the challenges that these differences may present to team functioning.

Later in this module we'll take a look at one cross cultural assessment tool and how it may be used in your organization.

Assessment then feeds into the second stage, which is focused on development. The development of cross-cultural competencies can occur through a number of different developmental activities, both experiential and traditional.

One experiential approach, for example, is to provide high-potential talent who are likely to someday be global leaders with international experiences during the early stages of their careers so that they can begin to learn how to manage across geographies and cultures. One

study found that only 12% of companies reported actually sending their global leadership talent overseas during the first five years of employment. However, 41% of these same companies claimed to use early overseas experience in talent development.

This kind of difference highlights the fact that expatriate assignments are not the only way to provide global insights or international experience. Being part of a global team, for example, can help individuals develop a better understanding of global issues.

Another example of an experiential approach-- TRW had participants in a global leadership program do an action learning project.

They traveled to China and visited a number of different sites, including government ministries, universities, and the Chinese divisions of multinational companies. They used these experiences to inform their project, which was focused on forming joint ventures and creating an overall China strategy.

In addition to these experiential approaches, we can also use more traditional development programs to develop cross-cultural competence. For example, leaders can participate in simulations and role plays aimed at conveying specific information about a culture or teaching more generic skills such as situational awareness. Training can also provide tips and strategies for managing diverse teams. For example, when there are language differences in a group, it can be helpful to set a clear agenda and distribute it in advance. In addition, leaders need to actively solicit the participation of all members and clearly document decisions and actions. It's important not to assume that everyone has the same understanding.

Finally, leaders can be given access to tools such as cultural navigators and "culture-grams" that they can access on demand.

These tools provide basic information that can help managers quickly prepare for cross-cultural interaction.

In sum, cross-cultural competence requires a combination of both culture-specific and culture-generic knowledge and skills. Through a process of assessment and development, we can assure that our remote leaders have the competencies needed to manage across cultural boundaries.

Transcript: Implement: Develop Leaders

Given the challenges and complexities involved with managing from a distance, it's important to provide remote leaders with the support and development necessary to be successful.

One helpful practice is to require employees to work with managers in a traditional environment before transitioning to remote work. This allows the manager to build a relationship with the employee and better understand their specific working style and needs.

In addition, organizations should provide training for remote leaders.

This training may focus on topics such as how to assist virtual employees in prioritizing their work and how to manage work-life spillover.

The training can also target interpersonal interactions aimed at helping managers fulfill

employees' needs for work-based social support and recognition and also reducing their perceptions of isolation.

The companies we have studied typically provide remote managers with training through the company website, webinars, and online tools.

Most of these training efforts are targeted toward management in general and not specifically targeted toward managers of virtual workers. However, we have also encountered a few companies that offer solutions specifically targeted at remote leaders.

One company, for example, bought an online course for managers focused on some of the fundamentals of leading from a distance, such as how to utilize different communication technologies and how to run online meetings. The program included narratives, exercises, quizzes, and tip sheets that managers could print out while taking the course. The course also tied in discussion forums, both online and in person, to continue the conversations regarding managing virtual workers and to keep the remote managers networked.

In addition to training, we can create online resources that provide remote managers with tips for handling different situations, give them guidelines for flexible work arrangements, and connect them with other remote managers.

Finally, it is important to help virtual leaders manage the complexity associated with their role. Citi, for example, has a very complex matrix structure, which they found was causing a number of pain points across key strategic management areas. For example, they found that there were silos throughout the organization. And also significant duplication and overlapped processes. So they created guiding principles, which they call the "rules of the road," for how they conduct business within their complex structure. For example, in the people management area, they developed an explicit approval process for hiring replacements at the global, regional, and country levels.

These guidelines drive efficiency and integration and also provide a framework to help global leaders make decisions.

In conclusion, companies can provide support and development for remote leaders through many different sources. The specific sources and programs that are relied upon will vary from organization to organization. However, the most important thing is that leaders have the resources, information, and tools they need to be successful in a virtual organization.

Transcript: *Implement: Tactical and Practical*

Up to this point we've been focusing on how the key leadership functions performed by remote managers are both similar to and different than what they are in more traditional environments.

Let's take a minute and consider some of the more practical implications associated with being a remote leader.

One is that leaders need to clearly spell out the do's and don'ts for employees working from home. For example, leaders need to make sure that employees understand that working from home cannot be used as a substitute for dependent care, and also that employees have a distraction-free environment from which to conduct their business.

In companies where there are important data privacy and confidentiality issues, leaders may be asked to make home visits and inspections. These visits are usually conducted annually and are designed to ensure that the employee has access to a private and confidential work space. Some companies also use the visits to ensure employees' work space complies with health and safety standards.

Most organizations also prohibit employees from conducting meetings at their homes, and it's the responsibility of leaders to make sure that employees understand these types of policies.

Leaders also need to make sure that employees understand not only the company's reimbursement practices, but also the rationale behind them. For example, if remote work is being offered as a way to reduce costs, reimbursement practices will often be more generous. However, if remote work is being provided as an employee benefit, then reimbursement may be less.

The contracting process we discussed earlier in this module can be a useful tool for communicating these guidelines and policies to employees so they understand the nature of some of these differences.

As we have discussed, work-life spillover can also be a challenge for remote workers. Thus, leaders need to monitor remote worker behavior and intervene when they notice that someone is always online.

Leaders also need to set clear expectations around work-life balance, and perhaps most importantly, need to model appropriate work behaviors themselves. The leader who sends emails at all hours of the night and on weekends or who conducts meetings while on vacation sends a strong message to their employees that work-life balance isn't really valued.

Ultimately, managers need to recognize the impact of overwork on employee health and productivity and take steps to help their employees manage work and life demands.

Finally, it's important to conduct regular check-ins to see how the arrangement is working on both ends. Leaders should typically schedule these check-ins at least annually and sometimes more frequently when employees first start working remotely.

These check-ins allow the leader to make sure adjustments to the arrangement and to provide coaching to employees who may be struggling with the transition to remote work.

Transcript: *Ask the Expert: Michelle Artibee*

What are some of the challenges you have experienced while trying to expand flexible work at Cornell University, and how have you sought to respond to them?

There's some specific ones as it relates to technology across campus. We're a very large institution, and so many of the colleges, units, departments have their own IT support, which might mean that the resources that they need or the tools that they use within their department will look different than what other departments might use. So one of the ways that we've tried to address that is by providing a guide to telecommuters-- a guide to telecommuting, excuse me-- on campus so that supervisors and employees alike understand what resources are available even from a central perspective.

An example is the video-conferencing service that we now have available that all faculty and staff have access to, so it's creating that universal language or that universal tool for our employees. I would say that tracking arrangements is one of our challenges. And part of that is because we do not have a central tracking mechanism, so we've had to find some creative ways to be able to capture that particular data. Remote workers that work outside of New York State kind of pose an interesting challenge. Cornell is a registered employer in a number of states but not all states, and so if an individual is looking to work remotely outside of New York State full-time, we have to take into consideration that there might be some tax and liability concerns that we have to pay attention to. And so we've been paying close attention to providing guidance to our work force and our HR managers on how to kind of navigate those issues.

Let's say lastly maybe one of the more bigger issues that I've observed over the years being in this field is this idea of work-life balance, and that's a term that's been around for a very long time. For me it conjures this image of being on a tightrope trying to balance work and home and always fearful that I'm going to fall off on one side or the other. And I work with a lot of individuals who put a lot of internal pressure on themselves to achieve this perfect balance as well. So often times the term that I use is "career life navigation" because I feel like a captain on a ship just trying to navigate through the waters of all the different things that are going on in my life. So we have those very specific challenges related to technology and other things, but it's also a mindset, it's expectations that individuals have of themselves and the way in which we as an employer will be able to support them. And you know part of it is just being mindful and beginning to have that conversation to kind of stretch folks' thinking about how they perceive their own work-life balance.

What tools and resources have you developed to support remote employees and those who manage them?

We have a pretty robust program that offers tools and resources to both supervisors and employees alike, and how to navigate flexible work arrangements. Either supervising individuals on them or from the employee perspective, how to request them in a way that makes sense for their position and for the university. So I think one of the most important pieces of that is that those individuals can come to me and to get a consultation about how to navigate these issues, so certainly they have that resource available to them that's outside of their immediate work group.

One of the things that I try to do is offer a variety of educational opportunities for supervisors and employees. So yes we offer training for supervisors. But we also offer programs like home work space ergonomic issues. So there's a variety of topics that are offered that are intended to support our employees that have flexible work arrangements, that work remotely so that they can learn how to continue to do that well and possibly even do it better. Our folks that work in technology are always seeking ways to provide better tools and resources and communicate them to the community as well. We've seen real enhancements in that way, and have a telecommuting guide available for our employees. We provide a lot of sample agreements.

So it's very important that documentation take place when an employee and a supervisor establish a flexible work arrangement, and oftentimes supervisors just need some guidance into how to do that well and to protect themselves and protect the employees. And so we provide those sample agreements, we give a lot of guidance, and what personality traits, what work styles make sense for different types of flexible work arrangements because certainly it's not a one-size-fits-all situation. I know individuals who would be pretty unhappy working remotely because they're so extroverted and enjoy being in the workplace and engaging with others in that way. So we, you know, try to ask a lot of the right question's to help folks think through that particular process and we're always looking for ways to offer additional assistance to employees and supervisors.

Transcript: *Identify Change from New Technology*

As new technologies emerge they are shifting how remote workers communicate, collaborate, and share knowledge and information.
For example, one way telecommunication is being replaced is by tools which enable dialogue or even "multilogue," which is a term used to refer to the many-to-many conversations that can be held through social networking, message boards, and forums.
Interactions are also shifting from face-to-face to virtual. A recent study found that even among employees located in the same site, interaction is increasingly occurring through technology rather than face-to-face. Some employees are more inclined to email or instant message a co-worker before walking down the hall.

New technologies are also enabling same-time synchronous collaboration as well as any-time asynchronous collaboration, and they also allow these interactions to occur not only locally but

also globally.

In addition, new technology tools increasingly allow employees to organize and share their knowledge. For example, back in 2005 an engineer at Intel decided that employees should have easy access to company information such as historical background and internal projects so he decided to create an internal wiki named Intel Pedia and a little under a year the site had 5,000 pages of content submitted by Intel workers all around the globe, and it had received 13.5 million views.

In another example, two majors in the U.S. Army, Nate Allen and Peter Kleiner, created the Company Command and Platoon Leader website to allow past, present, and future leaders to share experiential knowledge and lessons learned. Captains and lieutenants can log on to the sites to access a number of different features, including posting questions and receiving answers, reading interviews about other commanders' experiences in the field, and finding contacts with specific expertise. The sites allow leaders dispersed across various locations to rapidly share their experiences and lessons learned with other leaders, and also to tap into the latest knowledge before it becomes obsolete.

These grassroots efforts demonstrate another shift, which is that new technologies are increasingly allowing employees to take control over how they communicate and share information.

These are only a few examples, but they highlight how new technologies are reshaping how dispersed employees communicate, collaborate, and connect with one another.

Transcript: *Revel in Your Discomfort: Leaders Must Be Agile*

The rapidly evolving technology both enables these shifts as well as forces it to occur. For leaders it means understanding how work may be accomplished differently than has been done in the past.

Becoming comfortable and even agile with these changes is essential for professional survival and organizational competitiveness. The technology will not stop progressing, so ignoring it is not a viable strategy. Instead you need to understand how it can help your organization, and push yourself, leaders, workers, and IT function to be open to new ways of doing work.

At the same time it's important to avoid pushing new technology simply to have the newest and latest.

A 2010 report by the Society for Human Resource Management aptly points out that sometimes familiarity trumps sophistication. Employees may be too busy to learn a new technology or need a lot of hand-holding in the early stages of an adoption, so unless the new technology offers significant advantages it may be more productive to use those technologies with which employees are already familiar.

In short, it is the role of managers to decide how technology can be used as a strategic tool to support critical work processes and enable strong communication, collaboration, and information-sharing despite the lack of face-to-face interaction. This means maintaining an

awareness of the latest technologies, looking for opportunities to exploit new solutions, but also evaluating how different technologies and tools meet the needs of the workers and teams that they lead.

Transcript: *Characteristics of Communication Channels*

Learning about specific tools or applications will not help as they change so quickly that any article or course would soon be outdated. For example, a few years ago sophisticated video conferencing systems such as TelePresence were the go-to for live, face-to-face communication. These systems are still being used but employees are now able to also utilize other easier and less expensive video sharing tools such as Skype and Webex.
Thus, what is more important is that you can distinguish the relevant needs of a situation so that you can select among the many communication channels that are efficient and sustainable to your organization.

Once you identify class or type of communication channel, there are plenty of ways to learn how to use these tools. Just go to YouTube, the application's website, search the web, or maybe even ask others in your organization who already may be using it. I've even heard that our kids are a good resource.

Transcript: *Characteristics of Work Tasks*

So you've had a chance to look at a variety of use cases. We've talked about the four C's to give you a context for how to classify technologies based on the function they serve-- communication technologies, collaboration tools, connectivity, and content management. Let's touch on some basic characteristics of work tasks or situations that will help us in understanding the technology options that are appropriate. It's important to understand the nature of the work and supporting job tasks. This helps us in determining the technology as well as how we can source getting the work done.

One of the first things we need to understand is the intent of the content that needs to be captured, created, shared, or communicated in support of this job or task. Is it informational in nature, or is it interactive?
"Informational" is the one-way telling of something that requires no response-- simply sending information from a sender to a receiver. "Interactive" involves a dialogue or multi-way conversation. It could be instructional, brainstorming, collaborating, or feedback. Content that is more interactive requires technologies that offer higher levels of interactivity--in the form of two-way audio and video, for example.

The nature of the content is related to the second characteristic, which is time. Interactive content typically requires synchronous technologies that allow individuals to communicate and

collaborate in real time. Because informational content does not require a response, however, it can be communicated or shared through asynchronous technologies. For example, someone could simply post a video that others could view at any time.

When you think of the job, you also need to consider the needs for audio or visual forms to communicate the needs of the work. Visual could be text or documents, photos, illustrations, graphics, animation, video, or other media.

Greater audio and visual needs require technologies that offer higher levels of information richness, and will also require technology infrastructure that offers higher bandwidth.

The fourth element to consider is the expected shelf life of the content. Do you need to save it, refer back to it, update it later, reuse it? Do you need to save different versions, say for regulatory reasons?

Overall you need to consider the stability of the content when deciding on the most appropriate technology. For example, elaborate video productions may be a good investment for content that has a long shelf life, but may be impractical if content needs to be frequently updated.

Similarly, content management systems may be a good choice if content is dynamic and you need to keep track of current and past versions.

In summary, by considering these four elements--intent, time, AV needs, and shelf life--we can begin to narrow down the technology options that are best suited to the work tasks or situations performed by our remote employees.

Transcript: *Reduce the Options*

After you've narrowed the technology options using these four elements, you may find that you have several choices. That is, there may be a number of technologies that are appropriate given the nature of the work task or situation.

So how do we choose among these potential options?

One way we can further reduce the options is by considering the needs of the target audience, and also some practical considerations. Given the target audience, it is important to consider access needs and restrictions.

Who needs access to the information communicated as part of this job? Think of the audiences: Where are they located? What resources do they have available? Are there connectivity issues? Are there security requirements? Does access need to be controlled in some way to edit or change content?

Another way to narrow the options is to consider the practical considerations of each technology.

For example, what are the costs associated with developing, purchasing, updating, and

maintaining a given technology? Also, you need to consider the technological sophistication of the user population. How new or different is the technology from what they are already using? How much training and support will they need to get up to speed on the technology?

A final practical issue to consider is professionalism and this is something that is likely to vary from country to country. For example, here in the U.S. many organizations are hesitant to use Facebook for professional purposes because users tend to connect their profiles to many non-work-related things. However, in countries such as Brazil the average Facebook user is more mature so it tends to be used more for professional purposes.
Thus, it is important to consider the professionalism of different technologies and how it may vary depending on where users are located.

In summary, there are a number of different factors to consider when assessing the technology needs for a particular job. Some of these will be idiosyncratic to the position or the organization, but more generally, considering the four primary issues we have discussed--intent, timing, AV needs, and shelf life--can help you in determining the technologies and tools that may best meet the needs of different remote workers in your organization. Secondarily, it is helpful to consider the access needs of the audience and practical considerations such as cost and professionalism associated with the different technologies.

Transcript: *Example #1: Connect Around the World*

Let's look at an example of how this all comes together.
In this scenario we have the leader of an organization that needs to communicate the status update and progress of a major change initiative that is under way.

The intent of the message is to inform, a one-way channel. Because employees are around the world in different time zones, the leader would like to enable workers to get this information at a time that is convenient to them, so it is asynchronous.

We then ask the leader what kinds of content she needs to share. Are visuals needed, verbal content, written material?
We find that written content can be shared and a few visuals may be helpful. There is no motion required. So this gives us a better idea of our AV needs.
The shelf life of the content is short-lived. After a week or two or even a month maybe, the content is no longer needed and is out of date. There is no reason to save it or refer back to it later. At this point we can begin to narrow down the options to technologies such as email and blogs that may work in this situation.

The audience is located around the world with access to email and the web. The content should be accessible for employees only. Practically speaking, since the senior leader wants to communicate weekly and get some momentum and consistency with the communications, it

should be a channel that is easy to use, fast to publish, and either can be removed or not after go-live.

In this case the leader selects to use a blog format available to employees only. A blog allows for communication that is one way, asynchronous, and primarily written, and it also offers the flexibility to have the shelf life that the leader desires.

As is the case in many situations, it may be good to have more than one approach to ensure we reach all employees. We also know that the organization has quarterly town meetings to address any synchronous or interactive needs, and department managers can further provide the updates in staff meetings.

Transcript: *Example#2: Choice and Execution*

Now, you could choose an effective channel but execute poorly on that choice. For example, if the leader in this case does not keep up and posted a blog weekly, they chain of communication is then broken. If there are issues, be sure to distinguish the cause, what is different?

Once you choose how to communicate, be sure to learn how to use that technology effectively. Don't just show up and hope it will go okay. Also set the expectation for others to be ready too. Be sure software is installed and tested prior to any event. Providing training and job aids can also help. Doing this will help to ensure that your remote work practice achieves the desired outcomes.

In this case, we are remote technologies to have meetings with team members located around the world. Here we have a team located around the world that needs to facilitate meetings to improve a product or a process. Interaction is needed to brainstorm and explore possible solutions. Due to the nature of this work is best on synchronicity.

The work is most effectively accomplished when the team members can see the facilitators desktop and see ideas generated, data shared and quality tools applied in real time. They also need to hear each other. Seeing the text as generated will help participants who speak different languages. The team will want to refer back to the resulting documents that are created but no recording is needed of the actual meeting. Also, the audience will have access to computers with decent bandwidth. Practically speaking, it should be a tool that all should be able to use relatively easily.

In this case, the team chose to use go to meeting, an application where participants log in to site and can see the desktop of the presenter. They can either dial-in to a conference call or use the speakers and mic in their computer. After a few meetings run this way, feedback from the participants reveals that the action items are not getting done. They are running out of time, and there are other issues.

Now, if we were reactive, one could blame the remote technology selected and make an abrupt change. Instead, we should investigate further to identify the root causes of the team dysfunction.

As we walk through the scenario, we see we have selected an appropriate channel but upon further investigation, we see that how the meetings were run with the remote technology was not effective. The basics of running good meetings still apply regardless of whether the delivery is face to face or virtual. Any good meeting needs and agenda, action items, times keeper, et cetera. In addition, we need to take time outside of the meeting to be sure we know how to set up and use the technology. Before meetings occur, we need to make sure the team members know to use the features.
Too many efforts fail when half that meeting time is spent troubleshooting systems or loading software.

Transcript: *Example #3: A Big Deal*

Let's look at one more example.

In this scenario, a regional sales representative works for a company that makes health imaging equipment valued at over a million dollars. The sales rep has an opportunity to bid on a tender, but there are no examples of the product being used near this prospective client. The intent is an interactive sales product demonstration done in real time.
The sales rep wants to be able to answer any questions they have immediately, so he will want a technology with synchronous capabilities.

In terms of the AV needs, we know that the equipment is large and it also moves around the room. We need the customer to see the equipment and hear any comments made by the operator during the demonstration. The operator needs to hear but not necessarily see the customers.

The life of this content is short lived. If the customer needs to see it again, we take the time to do another demonstration. The global sales director first glances and thinks, "Gee, let's use Skype for this meeting. I have it at home and I use it with my family and it seems to work great." Skype is a free web videocasting tool available online. It uses VoIP to transmit both video and audio. Someone needs only to have access to the web and a web camera to use it. Another option would be to have a conference call and show an existing video of the product demonstration.

Now both of these seem reasonable given that the client does not want to travel out of town to a competitor's location to see the product in use. But a closer look at the situation shows us that this is a really important deal for the company. We want top quality and a reliable connection, and VoIP is not yet stable with this remote location. Also, the image quality of a

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computer webcam is not capable to effectively represent a million-dollar piece of equipment with a large range of motion.

The team also wants to tailor the demonstration to specific questions for these clients, so in this case we have to bring in some skilled resources to do a higher-end video teleconference event. A better camera and secure connection are used. There is a test run in advance to ensure that technological logistics work okay. In the end the company is awarded the bid.

Transcript: *Implement: Procure Technology*

So in our example, we know we need some technology for conducting video teleconferencing. What next?
It's important to note that while there are many of these tools available for free online, your aim is to have a system that is sustainable, effective, and efficient for your enterprise. We don't want to support seven different web conferencing platforms used in the same company. We're making a decision, involve people that would use it, along with purchasing and IT, which will need to support it. For example, in this case we'd involve training, service, sales, and administrators who will use this tool. We would also want input from purchasing and IT.

The use cases provide some examples of how we can narrow down features and make some distinctions between needed features and "nice-to-have's." You may find it helpful to run some demos with your own real use cases to compare products and to see how much they match with your own needs.
Here's one example that we found that compares the features of several web- conference meeting tools.
Before you buy, do you know what all the features are and if you need them, or are they just nice to have? If you grow, what will you need?
This is one example, but there are many resources online that you can use to compare tools and features of a given technology.

Transcript: *Ask the Expert: Pat French*

Remote work isn't a job function many people think of as a career. How did you, as an engineer, get into this field? What elements came together that brought you into a full time role leading virtual work?

I happen to have been in a program management role at the time, and I was brought into a couple major programs across Boeing to help them understand their programs. What I saw at that point in time on some of these large dispersed programs, again if you think of people across twelve major cities across the United States working side by side to put together a

complex product. What I noticed was the lack of the trust in relationships that you'd seen on other programs where everyone sits day to day next to each other. We're humans, we're basically social animals. We know people, we like people, we've grown up on programs where we worked in the same community. We knew people from church, from schools, from social activity, softball teams and that. As I looked at some of these big dispersed programs, I saw they didn't have that type of a connection. And I went into my doctoral program studying what happens as you lead large remote teams. And I interviewed leaders all across the company as part of that research.

What we found was there were four major differences that you need to focus on as you get dispersed like this. One of them is the leadership skills. We're a hi tech industry. So generally speaking, it's the engineers that are in the leadership roles. I'm an engineer, I can say this. Engineers aren't known for being the strongest, friendliest interpersonal skills. So you may need to have a different person in a leadership role that is able to do that strong communication, that relationship building, that person that builds bridges city to city across the United States on this program.

So we looked at different relationship skills as well as tools savvy. You need to be the person if you're leading the team, who understands the tools, who is able to find any information anywhere throughout the company, because you don't have that same inter personal network with the person, the go to person. You have to rely on finding the information. So that's one, leadership skills. The second one is the organizational set up.

And the one that stands out the most to me, the term we use is battle rhythm. And that is on these large programs how important it is that you have a strong battle rhythm on your program that drives how people act, how people understand where they'll get their information. An example of that would be your routine meetings throughout the course of a week. On Monday, every Monday the change board is gonna happen. Every Tuesday you're gonna have the finance review, every Wednesday you're gonna have the program review. People know that, it drives them everywhere and they know "I will get my answer on Monday." If I'm confused and I can't find my answer I know I don't have to go any further than that Monday and how important it is that once you set that battle rhythm, that everybody sticks to it. You don't cancel the meetings, you don't defer them to another day, everybody knows they'll come there and they'll get the information that they need. So that's all part of the organizational set up.

Next was the tools. You have to have a laptop. You cannot be on some of our programs without a laptop and all of our laptops are badge enabled with virtual private network access to your tools. Most people have some sort of a PDA, a Blackberry, an iphone, a something. So that you can stay connected at all times. And then the collaborative work environment is part of the tool system. You have to have a commonplace where all the material is stored, so that anyone can find it anywhere. And if you think of people and they don't know each other, and you start to lose that trust across the distance. It is immensely helpful when the people know they can go and review what's going on. I may not see you, I may not be able to talk to you, I start work

three hours before you. I can review what you are working on and I can give you feedback. So that collaborative work environment is critical.

Then the last aspect is training. You really need to train everybody when they come together on these large disperse teams or they have people that are working at home. You need to train them in the nuances of losing that casual interaction. How do you overcome the distance, how important it is to let people know who you are, learn something about you. And are training goes into everything we're talking about here today, how important the tools are, the communication skills. Train people and what we found is when you train people together, they work together stronger across the distance.

How does Boeing leverage technology and social media to support telecommuting?

Within Boeing just about everyone is going to have a laptop. And they're configured so that they can tie in to all of the Boeing networks, so that we have remote access capability. So that's just a standard for anybody. Again, we have PDAs to everybody, everybody who travels a lot. And we do, most of us are travelling on the road quite a bit. Also with everyone of your laptops is going to come a basic infrastructure of WebX meetings, email access to anyone within Boeing, a directory of anyone within the company, instant messaging is on there. Access to any of the Boeing networks within the classifications that you hold. We also have in place now what I'm going to refer to as the Boeing version of a Facebook, we call it Insight and our Insight system is where we have different groups together we happen to have a virtual team group. And that's a place where we post alot of literature on topics, presentations on topics. I happen to go to that site and I'm contacted by people all the time on our virtual group site. People ask questions they talk about things they're struggling with, others will chime and say how they've handled that same problem in the past. We have wikis, we have blogs, we have all of the types of the media that you see anywhere else. We have them within the company. We have search tools. So within the company you can find you can search any particular type of document, you can find examples of those documents so we have a very large social media network within the company.

Has Boeing seen any issues related to telecommuting or remote work?

Yes we have, we have certainly learned through the years that not all work is appropriate for working remote from your peers. We've now developed something that we talk about in terms of the skills and the tasks that are appropriate.

If you're a person who's gonna work remote from your team, working at home or working at a different city. You need to be first and foremost an expert in your area, you need to be the go-to person, you need to be a person who knows how to reach out and connect with anyone and you're very comfortable reaching out to people and finding them wherever they are. So that's the skills you have to have. You cannot learn your job sitting at home with all the experts being in the office. So first you gotta be the expert. Secondly, what are the tasks. If you look at again

building airplanes, you have to be near the airplane when you're building it. But there are tasks that don't require touch labor. You don't have to be right next to the product. If you think of analysis jobs or research, a lot of trends analysis, integrating different suppliers, reviewing materials. So there's particular jobs and tasks that are appropriate for being remote.

So we're focusing training and helping people to understand that and we've seen where there have been experiences where the individual wanted to work remote, but that individual didn't have the skills, wasn't in the right task. So you kinda swing the pendulum and you learn through that one. We have four generations working side by side. That's another thing that we're seeing here. And a lot of your ability to work remote and your comfort with it.

You don't want to stereotype people, but at the same time it has a lot to do with when you got your first computer. I'm a baby boomer, I remember them rolling my first computer in and I'm seeing it coming towards me. At that time, I had a secretary that sat outside my office and I'm thinking what am I gonna do with this, she types everything for me. Didn't take long till this took over that role and I was very comfortable with it. Others who are coming into the workforce today, they don't ever remember not having a computer. Two year olds are able to do things on computers. So a lot of the comfort comes from your exposure to computers and how comfortable you are working remote.

Many people in my generation are more comfortable face-to-face. And I hear that a lot from leaders, they'd much rather be face-to-face working an issue. You don't necessarily hear that from all generations. Some of the Millennials now have gone through entire degree programs and they've never met the people they work with. They interface with people across the world. So that comes in to play. Another thing that we've seen is when you think of some of our large programs with people in different sites. They may get together on a large networked meeting. And a typical day for me would be looking at a screen and there's eight sites so I'm seeing eight different sites of people. And you're working with them on something. What we've learned is when you hang up the phone from that, each site works a little bit more. So we've learned that over the distance, even though your together at some point in time, all that casual interaction starts to spin things a different way.

So we've learned that leaders need to be able to recognize and come back around and make sure everybody has that same information across the distance. You have to make sure people are very strong at internet communications. We have blogs, wikis, threaded conversations. You have to make sure that people learn how to use that and they're strong in it. An example the comes to my mind is on a program, it was a young engineer and it was a software problem that he was working on. And we saw that the person wasn't in the office every day, it took awhile till we understood the people that were helping him with the software were half a world apart from him. So he worked at night working with people in China and India in order to help him solve this complex software problem. So we've seen that, but again within the generations the people who were coming into the office were thinking where is he? He's thinking I'm finding the right answer. So it takes a little time to get people to understand all this.

Most of what we've seen from telecommuting is very positive. People tend to hear some of the negative stories, we've all heard things that happen on Facebook and things like that that are negative relationships that happen. So we all learn with time how to work this. It's a matter of a balance, and that's what we're trying to set right now. We're seeing the pendulum swing in some cases. We've seen teams that have sent people out. They've said you don't have to be together, but over time we found they were too dispersed. They lost that team spirit, that knowledge of each other, that trust that you have to have. So we're seeing teams that are bringing them back in to understand the skills, do more knowledge transfer, and then they'll consider moving them back out again. At the same time, I have teams that have always been together, that have said we're never here, we're never in the office. Why do we have this floor of offices when everyone's always on the road. So those people are starting to move people out to the field more and giving up those offices. So it's all about balance and learning as we go.

How does Boeing improve the connections between the baby-boomer generation of leaders and the millennial generation of recruits?

One thing that comes to my mind is on a large dispersed program that I was on was how we used the structured interviews, we all use interviews to bring people in. This team happened a be a large dispersed team. So we used virtual interviews for everyone. And you asked in those interviews typical questions, like Tell me about a time when you had to lead a team on a critical event and you'd never met any of the people on your team. When you're asking those questions and you're hearing the answers coming back from people, you can you can get some insight into how strong are they at leading teams. I can think of one individual who kept saying: I don't like to work remote. I want to be face-to-face, well after about four answers of I need to be face-to-face you realized he might be the most technically competent but he's not the one to lead this team because they're not going to be face-to-face. They are across these large dispersed areas. Others would have very strong stories of how they used a collaborative work environment and they used the battle rhythm of meetings across time. So we work to, to leverage the strengths of one generation to another generation. We have reverse mentoring. Most people when you think of mentoring you think of the senior person training the junior people. I hear from many senior leaders how they mentor. This might be a leader I'm talking to who is a baby boomer, their mentor is twenty five years old and they look to that person to help bring them in to the Internet revolution and to understand how important it is to be strong in these tools. So there are a couple of ways that we strengthen our multi-generational workforce.

Transcript: *What If It Does Not Work?*

Despite the best intentions of all involved parties, there are sometimes situations in which remote work arrangements do not work and employees have to return to the office. There are a number of different reasons why remote workers may be asked to return.
In some cases, the decision is driven by the supervisor. The employee may not be meeting their

goals, so the supervisor brings them back to the office to more closely monitor their performance. Sometimes supervisors return employees to the office because they do not or cannot manage their remote employees. Clearly, this is likely to lead to perceptions of unfairness among the workers, so in these situations it is best to try to work with the supervisor to address their concerns before asking employees to change their work status.

In other cases the move is driven by a shift in work practices. For example, one organization that I worked with shifted from "waterfall" to what is called "agile programming techniques," which require more real-time collaboration. Thus, programmers were brought back into the office to facilitate higher levels of interaction.

Although such moves are rather common, it doesn't mean that there aren't challenges involved in bringing employees back to the office. One of the biggest challenges is that employees generally do not welcome the change. As an example my colleagues and I recently conducted survey of several thousand remote workers and asked them how willing they would be to return to the office for the right job opportunity. Less than 20% of the respondents indicated that they would be very willing to return to the office--and that was when they were being offered a better job. If you expect people to want to come back to the office, then it's really essential to create a workplace environment that is collaborative and high energy.

In other words, the employees need to see the benefits of working in the office and in having close interactions with their peers.

Sometimes the resistance comes from the managers themselves. The managers may buy into remote work and the value it offers, and thus resist moves by the organization to bring employees back.

In general these situations highlight the importance of having clear remote work policies and guidelines in place.

As we discussed earlier, remote work agreements should state the grounds on which an arrangement can be terminated and the process required for doing so.

However, both managers and organizations should be careful to return employees only when there is a clear business-related justification.

These actions can send mixed messages about the value of remote work, which has a potential to undermine flexible work initiatives.

Transcript: *Identify Measures of Success*

You may think it is overwhelming to consider measuring the effectiveness and impact of a remote work initiative, but it doesn't have to be. In many cases organizations already have some measures or feedback systems that can be leveraged to help assess effectiveness right along with how they assess other work practices.

Even if this is not the case, devoting the time and energy needed to measure the effectiveness of your remote work practices will be a good investment.

A mistake we often make is that we think of evaluation as a one-shot deal designed to tell us whether or not a program or initiative has been a success or a failure. This mindset is one reason why many HR programs go unmeasured. Think about it--if we adopt this perspective, what is the value to the HR professional to measure the effectiveness of one of their programs? If they showed that it is a success then everyone will say "It better be because that's your job." If they show it's a failure then they undermine their own competence, and all their hard work in designing and implementing the program is lost.

A different approach is to view evaluation as a process of continuous improvement. It should not be a one-shot deal, but rather an ongoing process that occurs at regular intervals over time. This way we can make sure that our programs stay relevant and potent as the environment in which our organizations operate changes.
It should also not be viewed as a mechanism for make-or-break decision- making rather it should be approached as a way to gather data to let you know whether you are on the right track and to identify opportunities to further strengthen and improve a program.

In addition to continuous improvement, there are a number of other good reasons to invest in the evaluation of your remote work practices.
For example, the results can be fed back to key stakeholders in the organization, such as the top management team, to secure their continued support of the program. It can also be used to provide evidence-based responses to concerns or critiques raised by managers or other office-based employees.
The data can also be used to inform resource allocation decisions in the organization. If you show, for example, that flexible work practices have a significant impact on improving employee health and well-being, it might make sense to invest more here than in other, less impactful interventions.

In sum, there are many reasons to assess the effectiveness of your remote work program that go beyond simply determining whether or not it is a success.
Thus this part of the course has two main objectives. The first is to help you identify measures that can be used to assess the effectiveness of your remote work practices. Second, we will examine some of the fundamentals involved in designing a sound evaluation plan.

Transcript: *Design an Evaluation Plan*

As you embark on creating an evaluation plan for your remote work initiative there are two issues that you'll need to tackle before anything else. The first is deciding on the goals of the evaluation, that is, what questions do you want to answer with the evaluation data? It's important to clarify the goals of the evaluation at the outset because they will ultimately determine the type of data you need to gather through your evaluation.Second, you'll need to make some decisions regarding the basic design of the evaluation system. What sources of data will be utilized? How often will these be collected? Will you use a control or comparison group

to allow for stronger conclusions? It's important to think about these issues up front because they can help us identify where we can take advantage of existing data sources and feedback mechanisms, and also give us the lead time to build new evaluation mechanisms. So, let's explore each of these issues in a little more detail.

The first issue involves clarifying the goals of the evaluation, what questions do we want to answer? Broadly speaking, there are typically three types of questions we may want to examine. The first is the question of effectiveness. That is are our remote work practices achieving the desired results? And where are there opportunities to enhance the impact of remote work? To decide how to evaluate effectiveness, we need to go back to our business case. Why are we adopting remote work, and what results to we expect to see? Will it lower costs, reduce risk, strengthen our human capital, increase productivity, et cetera. You'll remember that in Module One, you specified measurable goals in your action plan. These are the goals that you'll want to assess and evaluate to determine the overall effectiveness of your program. Over time these goals may evolve, such that they are revised, deleted, or new goals may be added. But they provide an initial starting point to think about what types of metrics should be used to evaluate effectiveness. It doesn't make sense, for example, to evaluate effectiveness based on human capital metrics if the remote work initiative was primarily a cost reduction play. So our evaluation plan needs to be aligned with our business case.

The second question we can examine focuses on implementation. Specifically, we can ask how well the remote work program was implemented and whether there are opportunities to strengthen our remote work practices. For example, we may want to evaluate whether our remote employees have all the tools and resources needed to effectively carry out their work. We can also assess how well the remote work program has been communicated throughout the organization. Have those in the organization bought into the idea, or is there still significant resistance? Do employees understand how decisions are made about who can work remotely and who cannot? In short, we can survey both remote workers and others in the organization to understand how effective we've been in implementing work remote practices, and to identify changes that can be made to further improve them.

A third related question we can examine concerns usage or utilization. Here we are interested in understanding the adoption of remote work practices throughout the organization as well as knowing more about who is taking advantage of the program. Some things we may look at here, are the percentage of employees who are working remotely, and the rate at which this figure is growing. We can also look at the extent to which remote work is being adopted in different parts of the organization. Is it, for example, more prevalent in some businesses or functional areas than others?

Finally, we can examine trends and who is working remotely. Do we see differences in adoption based on things like age, gender, tenure, or job level? This descriptive information can be useful for making sure the program is designed to fit the specific needs of these users and it can also help us to identify potentially underserved populations.

Once we identify the types of questions we want answered then we can start to think through the basic design of the evaluation. In many ways, the questions we are asking determine the data we need to collect, which in turn drives the design of the evaluation system. So, once again, it is important to start with those questions. For example, if we were primarily interested in information about usage we can probably source much of the data from existing HR records. Questions regarding implementation will probably need to be assessed by surveying or interviewing employers and managers. And questions regarding effectiveness are often examined using objective indicators such as data on real estate spend.

Although the data sources may be dictated by the types of questions we are asking, there are other evaluation decisions we will need to make when putting together our plan. One is deciding how often to track the data. Do we want to gather the data annually, semiannually, monthly, or even more frequently? In part, this will depend on the type of metrics we want to track, and how often we expect to see change in them. However, as noted earlier, the important thing is to evaluate on an ongoing, continuous basis. Often the trends we see in a particular metric over time are much more meaningful than the level of the metric at any given point in time.

It is also important to consider how the evaluation design can be used to strengthen and support the conclusions drawn from the data. If you show, for example, that those employees who are working remotely have lower turnover, decision makers will ask you how you know it's the remote work practices that are causing this effect. Now, causality is easy to prove in a laboratory but typically very difficult to prove in the real world. But there are some ways to strenghthen our conclusions by, for example, using comparison groups. If we can show that turnover is lower among remote workers than it is among a comparable group of office-based workers, we have greater confidence that remote work is playing some role in that reduction. In summary, to generate helpful feedback on your remote work program, you need to first identify the questions you want answered and then you can start to think through the best way to gather the data that'll speak to those questions.

Transcript: *Ask the Experts: Measuring Success*

Michelle Artibee: How does Cornell University measure and track the success of its flexible work program?

Tracking arrangements currently is a bit of a challenge at Cornell, and the reason for that is that we don't have a central tracking mechanism in our personnel management software, if you will, for doing so. And that is changing over the next few years we anticipate a solution to that. In the meantime, and historically, we've relied upon human resource representatives to track arrangements and to report them to us in a central manner. So that we can compile all of that data and take a look at utilization. But ideally we would like a less cumbersome way of being

able to do that. That's a very common problem that folks in the worklife field have in terms of capturing this kind of information.

So in the meantime what we have done is on top of getting that information for human resource. representatives is we've conducted a number of campus surveys and evaluations. I'm not necessarily just focusing on flexible work. But other issues going on on campus where we've been able to integrate some questions about their flexible work experience. For example every other year we offer a wellness survey to our campus employees and a couple thousand individuals respond to the survey and we ask are you participating in a flexible worker arrangment and so we're able to get some very rich data from that. In two thousand eleven the university offered a staff engagement survey where we were able to capture some information on regarding thoughts and perceptions about how an immediate supervisor and the university helps an individual balance work and family. And then we also had the external surveys by a foundations and award organizations we're looking at us now as an employee are that supports flexible work and trying to determine whether our programs are worthy of honoring and I'm very proud that we indeed has been given those recognitions. And so I take a close look at the number of consultations that we have from year to year. So obviously as you can see we try to be really creative in terms of how we capture that kind of information and we are certainly pursuing a way that we can do that in a more central and less cumbersome way.

Pat French: Does Boeing collect data on telecommuting? What do the data tell you?

Yes, we do, we've collected data from the beginning of us using telecommuting. We know one of the key measures that we've seen in this is when you think of the big Boeing programs, most people think of Boeing as a seven forty seven, a seven fifty seven. If you're military, you might think of us in terms of an F eighteen. Some of our military programs. We also own the shuttle, the International Space Station. So those types of programs.

What we have found is on programs, people work together close to the product a lot more than some of our enterprise groups. So when we've measured how much they use telecommuting on a typical program, it's probably only in the ten% range that people work from their homes or remote from their product only on the ten% amount of the time. When you get in to some of our large infrastructure organizations, say our facilities organizations, human resources, IT organization. You get into a much larger use of telecommuting. Some of those teams could be on the level of thirty to forty % of the people telecommute any point in time. So these are the large global teams, finance is a good example of that. There's people all over the world working on the finance within the company. So they are able to work remote from the Boeing facility a larger amount of the time.

Besides just the numbers of people we also measure job satisfaction, employee engagement is a key metric within any human resource area. So we look at the employee engagement, that tops job satisfaction. And it kinda leads to your understanding of retention of people. We've seen, as we look at people who telecommute, very strong employee engagement scores. So

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we've recognized that people enjoy their job, feel rewarded for their job when they're in the telecommuting. We've looked at performance data. One of the key things you'll read about people who work remote is the fear of out of sight out of mind. So we've looked at that. Are people afraid if they're not seen day in and day out. Are they recognized.

We've seen very strong performance data. Now we don't know the cause and effect of the performance data. we do not know if it's strong employees are allowed to tele commute or because they telecommute, are they strong performers. We don't know the cause and affect of that. But very strong performance review data. We also have looked promotions to make sure that people are being treated fairly, and we've seen no loss in any promotions, no degradation in that. So we realized that it does work, people do appreciate it, they're effective in their jobs. Besides those, we also look at cost savings. We know what facilities we've been able to reduce, we've looked at mileage saved, we know how many people aren't commuting on particular days. If you work at home two days a week we calculate that mileage. We look at reduction in pollution. So we look at a lot of things.

Transcript: *The Future of Remote Work*

So what does the future hold in terms of remote work? For one, we can predict that it will continue to grow, and it's likely that its growth will occur quite rapidly.
During the recession we saw the first-ever contraction in remote work, yet there are signs that it's already rebounding and will continue to grow given the economic and competitive pressures organizations face today, along with workers' growing desire for flexibility and a host of other factors that make remote work an attractive option for both organizations and their employees.

We are also likely to see remote work expand into new populations of employees, and also into new occupations. For example, remote work has traditionally been largely confined to nonsupervisory employees, but many organizations are looking at ways to have more managers and executives working outside the office.
Now if nothing else, having some supervisory employees work outside the office even on an occasional basis can help perpetuate a culture that supports and values remote work.
In addition, some of the greatest growth in remote work in recent years has occurred among occupational groups such as lawyers that have traditionally not worked outside the office. In the years to come we're likely to see continued growth in these occupations that have gained some recent momentum, and we're also likely to see a broader array of occupations begin to experiment with remote work practices.

Finally, new forms or configurations of remote work will emerge in the years to come.
One of the current trends in this area is co-working, where remote workers come from different organizations [and are] working together in a shared space. The space may be a formal office or a social area such as a coffee shop.

The idea is that co-working allows individuals who are working independently to benefit from the synergy that can come from working side by side with other talented people.
A related trend is jellies. A jelly is a casual work event where telecommuters in a community gather at a coffee shop or other location to collaborate or socialize. Jellies can help remote workers overcome the isolation that often is associated with working outside the office.

As remote work grows, employees will seek new ways to connect with not only those back at the office but also the growing population of remote workers from other organizations.

Transcript: *Technology Predictions*

As far as technology goes, we can expect to continue to see radical innovation that in turn shapes how we do our work.
Let's look at a few examples across the four C's that we have discussed.

In the area of collaboration, employees located both within and outside the office are increasingly relying on low-cost and easily accessible tools such as Google Drive and Google Docs to share information and collaborate.
Rather than having to send versions of documents back and forth, these tools allow multiple users to access and modify shared work products, often simultaneously in real time.

Connectivity continues to grow faster, more reliable, and more easily accessible not only in Western countries but also in less-developed corners of the world. As these trends continue, they'll have significant implications for organizations looking to expand remote work options globally.
Currently, remote work is less prevalent in many emerging markets, in part because the technology infrastructure cannot support it. But as connectivity improves in these locations, there will be greater opportunity for organizations to expand their remote work practices beyond their mature markets.

In terms of content management, one notable trend is the growing use of cloud computing. The cloud not only allows employees to store and access massive amounts of data in a secure environment, but also allows them to share files and collaborate with other users. In addition, Cloud content management systems can be used to sync and back up important files, which can be extremely valuable for employees who split their time between the office and another location.

Finally, we will continue to see advances in communication technology.
One current trend is BYOD, or bring your own device. With BYOD, employees bring their own device to work and use it to access company resources such as email, file servers, and databases. It is estimated that 90% of employees are already using their own technology in some capacity at work.

This trend toward BYOD may make the transition to working outside the office easier for employees, but it comes with the need for organizations to support a wider range of tools and also to manage employees' use of the tools. If left unmanaged, BYOD can lead to a number of problems, not the least of which is data breaches.

In short, technology advances have been and will continue to be an important driver and source of innovation for remote work. The challenge for organizations will be to stay current on the latest technologies and to be able to identify those that best align with employee needs, job characteristics, and business priorities.

Transcript: *Workforce Predictions*

Another interesting trend to watch is how the acceptance and adoption of remote work evolve as new workers enter the work force and join our organizations. One of the defining characteristics of the millennial generation, which sometimes people call "Nexters" or "Generation Y," is their technological savvy, which one suspects should translate to more favorable attitudes toward working remotely.

In fact, some observers have suggested that as more and more workers who have grown up in the digital age join our organizations, remote work may evolve from a relatively novel practice to simply the norm for how work gets done.

At the same time, we also need to be careful to avoid making sweeping generalizations based on these generational classifications.

I've spoken to a number of companies that have done studies to examine whether there are demographic trends among those who prefer or choose to work remotely. And generally they fail to find significant age or generational differences.

Now of course this could change as more millenials join our organizations, but there's also some evidence that when we look at certain attitudes, values, and work preferences for workers across different generations, sometimes they tend to be more similar than they are different.

Also, we have to remember that there will be differences among workers within a given generation; that is, not all millenials will be technologically savvy or like informality, and those that are attracted to and join our organization may be quite different from those who choose to join one of our competitors.

Thus, what we need to understand are the expectations held by new entrants to our organizations. For instance, what do they expect in terms of flexibility and work-life balance? How important is it for these employees to socialize with their co-workers in a face-to-face environment, or are they just as comfortable or maybe even more comfortable interacting through technology?

By considering these issues we can more accurately anticipate new workers' appetite for flexible work and also better determine those remote work practices that are likely to help meet their expectations and to keep them engaged and satisfied.

Transcript: *Global Predictions*

In this course we have admittedly focused more attention on the remote work trends occurring in places such as the United States, yet the benefits of remote work are not confined to these locations. In addition, as we have discussed, virtual teams and remote work hold the promise of connecting widely dispersed populations of employees for the purposes of collaboration and knowledge-sharing.

Thus, it should not be surprising that remote work is growing rapidly in many parts of the world. For example, a study by Eurofound revealed that in 2000, the average proportion of employees involved in telework was about 5.3% in the older 15 EU member states. Now in 2005, the overall proportion had increased to 7% for the entire EU27. Furthermore, rates were significantly higher in some countries than others.

In the Czech Republic, for example, 15.2% of employees were involved in telework in 2005, whereas this figure was only 2.3% for Italy.

Eurofound predicted that numerous factors, including advances in technology and improved broadband access, would drive future growth in telework in the EU.

That being said, we also need to stay mindful of global considerations when thinking about remote work in other parts of the world.

As we have discussed, remote work is less prevalent in some locations due to infrastructure issues.

In addition, norms around work will differ across countries. For example, in many European and Asian countries, a strong culture of face time remains a barrier to widespread acceptance of remote work. Further, in countries such as India, employees often work on-site as a requirement of service-level agreements.

In short, remote work is growing in many different parts of the world, yet there are many important issues that need to be evaluated before an organization decides to expand their remote work practices globally.

Transcript: *Helpful Resources*

There are a number of resources that can help you to stay current on trends in the area of remote work and get the most out of it for your organization. I think one of the best, although I have to admit I'm somewhat biased, is the Cornell Center for Advanced Human Resource Studies, also known as CAHRS.

By visiting the CAHRS website you can get access to our latest research on remote work, and

download summaries of working groups where we have gone out and talked to companies to understand their best practices. You can read news stories and also watch webcasts. And the best part is that you can get access to all these resources for free. The CAHRS website already contains a nice collection of resources on remote work, and we will be adding to it as we continue our work in this area.

There are also a number of professional organizations that are tracking trends in this area. For example, the World at Work does a biannual study of teleworking in the United States and publishes the results. The Society for Human Resource Management has also published several special reports on telework and virtual organizations in recent years.
There are a growing number of organizations and outlets focused on trends in remote work, but these are a few that I think you'll find particularly informative and helpful for staying current and up to date in this area.

Transcript: Ask the Expert: Elease Wright questions 3A, 3B, and 6

As you think about the huge adoption of telework at Aetna, what has enabled it to be successful?

I think if you had asked me five years ago if we would ever get to 47% in the organization I would've said there's no way. If you had asked me five years ago whether we could have such a successful program where folks who work outside the office are still an integral part of the culture of the organization, I would've said no I don't think you can do that but then as you think about managers in the organization as the company itself grows not only domestically, but internationally.

We have supervisors who are managing people across the country and in some cases across different parts of the world, overseas. So if they could do that why can't we manage a population of people will just happen to be, the majority of them happen to be at home or happen to be sort of, you know, their car is their office. Why shouldn't we be able to do that. We've been successful in doing that because we have certain standards that you have to meet in order to work outside the office. you have to be a top performer, productivity has to be at least what it was when you were in the office. In some cases in some parts of our organization the criteria is that productivity has to be better than it was in the office.

We also provide training for supervisors and employees, and in some cases employees are required to work in the office for at least a year before they can even be considered for work outside the office. So I think I wanted to explain it's important to understand that infrastructure. When you talk about the work environment, if you work at home, it means this is not an opportunity for you to eliminate child care. Because this is supposed to be a business setting, this is not a situation where you have the dog barking in the background as you're

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talking to customers. So that there's some you know, sort of noise control requirements that you have to have. We provide the employees with the technology so that they are able to do from their home or wherever they happen to work, the same level of work that they would from the office.

And over time, and we have some fabulous technology people, we've been able to provide them not only with the technology for them to provide services to their customers, but as an employee they're able to access the same information that they would if they were office bound. So over the past few years for example, the streaming video technology that would allow me in my office to see our CEO when he makes presentations real time, in our auditorium . That same capability now exists with many of our workers who are at home.

2. What have you learned about remote work that you've used to improve the program?

What we learned from the experience and getting input from people who were actually working as teleworkers is that you have to make the effort to insure that they feel like a part of the team. So, I'll give you a simple example. In my organization, it may sound silly but for period, I have two people on my team who are teleworkers who are pretty senior in the organization; we literally had their pictures on the conference table when we had my staff meetings, because I mean, we all have a propensity of forgetting about the person on the phone, but it was just a reminder.

So there was some courtesies or etiquette that you had appropriate etiquette for you know sort of interacting with people who were teleworkers and then over time it became part of the norm. We also made sure that during the time they came into the office, there was space for them. So we have teleworking space where people can come in they can work, they can plug in their computers, they can have their own phone. So we build that space into the office locations that we had.

And sometimes it's the little things, we also have a telework employee resource group. So that people who are teleworking can connect with one another and probably some of the best suggestions that we've received about improving the program have come from the people who are actually doing the telework.

What do you see on the horizon for remote work? What's next?

As we consider what we need to think about in the future, one thing is whether this program is gonna grow any bigger then it has been and considering it a program where almost half of the population is a part of you know, participates in the program may not be sort of the right characterization. They are, these folks are a vital part of our organization, they're part of the culture for the reasons that I mentioned before. They're recognized by their peers, they are some of the most talented folks in the organization. Their productivity levels tend to be higher and their engagement levels tend to be higher.

But what we do have to look at is are these folks being developed in the way that others in the organization are being developed. The dilemma we face sometimes though is that you've got individuals who may reach a point in their career where they have to come back to the office. And for teleworkers, oftentimes they like the flexibility of not having to come into the office. So there are choices that have to be made. As we continue to grow and as we continue to become more of a global company, there may be more opportunities for us to consider whether you can take on different kinds of jobs, maybe more senior jobs, maybe broader jobs, maybe more jobs that are outside, you know, whether they're operations positions or clinical positions. Are there opportunities for people that take on these broader responsibilities and still tele work. And those are the kinds of things that we really have to access.

The other thing I wanna emphasize, If I go back ten years ago the focus of those folks, you know, the kinds of jobs in which people were work at home or teleworkers, were claims and calls jobs. Now when you think about it, we have a huge portion of our clinical staff, the nurses who review some of our cases, those case managers, they're teleworkers. We have had such an extremely successful outcome in recruiting nurses into our organization, because they can say I can work at home, I can do a good job, I can be a part of a community. And I don't have to you know, and I can connect with people. That has been so successful. So if I go back five years ago did I think we could do it in the clinical community? No, I was, well we have been and not only have we been able to, it's a competitive advantage. So we'll have to continue to look at that as we move forward. We'll have to continue to see where they're opportunities. But we cannot forget as we think about any types of support for employees in the organization, we've got to consider that half the population, it doesn't meet what is the traditional way of working in an organization.

Transcript: *Thank You and Farewell*

Remote work is an exciting area right now, due to its vast potential and its rapid evolution. In this course we have covered the building blocks for creating an effective remote work program. These building blocks can help you to harness the potential of remote work to support your strategic priorities and also to hopefully preempt some of the challenges that come with a major organizational change effort such as this.

A theme that has been threaded throughout our discussions is that effective remote work comes about when we focus on not only the technological element but also the human element. Yes, we need to invest in tools and technologies; however, we also need to make sure that they support the needs of the workers who will be using them.
In addition we need to make sure that we select the right people for remote work assignments, help them stay engaged and connected, and ensure that they are supported by a culture that values remote work and by leaders who know how to manage in the virtual environment. When these different pieces come together, that's when the magic happens.

In closing, I'd like to thank you for participating in this course.

I hope you're excited to put the ideas and tools from this course into practice in your organization and I wish you all the success with your remote work practices.