

**2020 EMBRACING TRANSFORMATION**  
FINANCIAL MANAGEMENT CONFERENCE

# Effective Remote Work Policies

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**STRENGTHMATTERS®**

# Getting Started

- All participant lines are muted.
- You may use the **Chat** feature to ask questions.
- Please use the **Raise Hand** feature if you would like to speak.
  - The Raise Hand feature is located in the Participant panel.
- Any questions not answered during the presentation will be addressed at the end of the session.

# Continuing Professional Education Requirements for CPAs

- **Polls are Required for CPEs**

- If you are seeking CPE credits, please submit ALL polls and the conference evaluations.
- We use **Polls** and the **Zoom attendance record** to verify participation throughout the webinar.
  - **Participants must submit ALL polls and be logged in no later than 10 minutes after the scheduled session start time to receive a certificate.**
- You may request a certificate of completion via the conference evaluations.
  - Links to the evaluations are emailed to all registrants.
- For more information on CPE credits, contact Lindsay Wells at [consult.lwells@gmail.com](mailto:consult.lwells@gmail.com).

# Effective Remote Work Policies and Practices

- Policy vs. Practice
- Working remotely extremes and tips to find balance
- Lessons learned – good and not so good
- Office status and impact
- Staff health and wellbeing



# Using policies for your benefit



POLICIES CAN BE HELPFUL  
IN CREATING CLARITY FOR  
STAFF AND LEADERSHIP



FOCUSED TASK FORCE HAS  
PROVEN TO BE BIG VALUE  
ADD



BE CAREFUL NOT TO CREATE  
POLICIES THAT LIMIT  
FLEXIBILITY AND CREATIVITY



## Policy in practice

### What has worked well

- COVID PTO policies
- Centralized COVID Task Force
- Site skeleton crews
- Flexible hours for staff where appropriate
- Allowing equipment to be taken home
- Equipment stipends

### What might not work

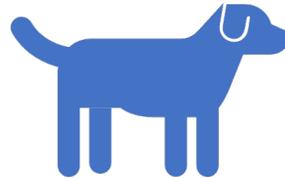
- Policies that might over-regulate flexibility and creativity
- Flexibility without oversight
- Equipment stipend?

# Poll Question #1

# Categories of working remotely - extremes



No separation – can't walk away –  
working longer hours



Everything is a distraction – kids, dog,  
laundry, meals



Working to find your balance and  
supporting your team in doing the same  
is critical

# Tips for staying productive when working from home

Stick to your usual routine (or create a new one)

Define your workspace

Plan your day/week

Confirm priorities and deadlines

Minimize distractions

Take lunch and breaks

Use video conferencing

Discipline

Take an attitude check

# Tips on supervision



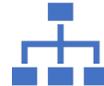
**Set clear expectations and goals**



**Schedule and maintain regular check-ins**



**Use video conferencing tools to stay connected**



**Determine key tasks that are challenging in the new work environment**

Involve staff in creating new processes where needed



**Trust and support – don't micromanage**



**Understand that new approaches may be required**

Don't be afraid to pilot new approaches and fail



Lessons  
learned on  
leadership –  
good and bad

## Positives

- Focused onboarding – daily meetings
- Skip level meetings
- Coffee time
- Ice breaker – what color
- Creating new opportunities – update team

## Not so positives

- Onboarding – assuming all is normal
- Technology skills
- Productivity police
- Work/life balance

# Recognition

- Even in “good” times managers often don’t take the time to recognize staff
- In this environment a little can go a long way
- Many ways to talk yourself out of recognition – don’t do it
  - I don’t have time/money
  - Good staff don’t need recognition
  - I don’t want to play favorites
  - Don’t want to recognize mediocre performers

# Quick recognition ideas

- Staff meeting – ask each employee to share a recent accomplishment
- Have a staff member train a new team member
- Handwritten note
- Acknowledgment from a senior leader
- Time off – early departure, long lunch

# Poll Question #2

## Office status and impact on staff

- People are seeking and craving clarity
  - Clarity = control
- If you haven't defined a "new normal" strive to do that
- If your "new normal" is changing acknowledge that
- Make investments in changes if your work from home is continuing
  - Home office set-up
  - Flexibility in hours
  - New processes

# Poll Question #3

# Staff health and well being

- Staff working in a very stressful environment
  - Pandemic
  - Contentious political environment
  - Racial tensions
  - A lot of items beyond their control – kids, school, etc.

# Staff health and well being

- You can be a supporter of your staff's wellbeing
- Are you seeing changes in performance
- Is there a drop in engagement
- What do you notice in terms of mood
- What do you pick up from regular conversations



# Staff health and wellbeing – potential resources

- You – being available and willing to talk
- Time off
- Human Resources
- Employee Assistance Plan (EAP)

# Questions and comments

