

Getting Started with Remote Work

Making the shift to remote work isn't just a logistical change—it's a mindset shift. This module walks CPAs and tax professionals through the fundamentals of transitioning away from a traditional office environment, covering best practices for getting started and setting up a productive remote workspace. You'll hear from business leaders who've navigated this transition successfully and pick up practical strategies for organizing both your physical space and your thinking so you can hit the ground running.

CREDIT HOURS 2 | FIELD OF STUDY BUSINESS | EXAM QUESTIONS 10

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LEARNING ASSIGNMENTS AND OBJECTIVES

Assignment

- Study the full course materials included here.
- Complete the review questions after each chapter.
- Answer 10 final exam questions.
- Final exam is scored immediately, 70% or better passes.
- Certificate of completion is available in your account.
- Failed exams can be retaken free of charge.

Course Objectives

- Identify the reasons given by companies to avoid allowing workers to work remotely.
- Recognize SMART goal criteria.

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Chapter 1: YOU CAN'T GO TO THE OFFICE: WHERE DO YOU GO FROM HERE?

Chapter Objective

After completing this chapter, you should be able to:

- Identify the reasons given by companies to avoid allowing workers to work remotely.

Indianapolis, April 3, 2006 – Public safety officials are still concerned about Sunday's storm damage to the Regions Bank tower downtown. The straight-line winds blew out windows on several floors and peeled away parts of the building's facade.

While the wind is responsible for the initial damage to the city's third tallest building, wind will keep the area around it closed for at least another day. Channel 13 Meteorologist Jude Redfield says the wind speeds are expected to be up to 25 miles per hour through Tuesday afternoon. That means falling glass and debris from the Regions building are still a big safety concern.

Three sides and 16 floors of the building are damaged and it will be a while before the tower is repaired. Spokesperson Myra Borshoff says that is bad news for tenants.

"For the foreseeable future, this building will not be occupied. . . Right now, our focus is securing the building and making it safe."

In the short term that means protecting pedestrians and drivers from falling glass and metal. And, Borshoff says, that means keeping the area around the tower off-limits.

"I would say for at least for the next few days, those streets will not be available and you should probably plan to leave 15 to 20 minutes early."

Mayor Bart Peterson agrees. "When we are sure nothing is going to fall off the buildings, then we will reopen the streets."

But the businesses and their employees who work at One Indiana Square will have to wait longer. Getting back to business for them means finding temporary office space elsewhere. Susan Matthews, with the building's management, says they are doing their best to help. "We are in the process of contacting tenants, assessing their needs, and helping them find space."

Building owner Mickey Maurer says they'll do what is necessary. "That's part of being local. We're here. We told those tenants we'd stand behind them, and we've got a plan, we've got an army put together, and we will stand behind them."

Hotels and office buildings in the downtown area have reached out, offering their extra space. One Indiana Square has about 30 tenants and 1,000 employees. Among those are accounting firms who are eager to get back to work with tax day just two weeks away.

Lynsay Clutter-Eyewitness News, Area around Regions Tower to stay closed,

WTHR, April 4, 2006

DISASTER STRIKES

Imagine that you are awakened in the wee hours of the morning to be told that there was a fire in the middle of the night. Although nobody was harmed, your workplace has been severely damaged and is unusable. What is the first thing that pops into your head? Does your mind dart to worry about the various company files and assets that were in the office? Is the anxiety of upcoming project deadlines lumping in your throat? Do you race your thoughts around trying to figure out how to keep the team working and the company operational?

All of these are valid concerns, and there is no correct order of priority. This type of scenario has happened countless times around the world. Sudden man-made and natural disasters have interrupted the flow of business for centuries. In the preceding news report from WTHR in Indianapolis, you can see a good example in which roughly 1,000 workers of over 30 businesses were suddenly displaced without warning.

How Long Will the Crisis Last?

The building mentioned in the Eyewitness News story from April 2006 is the third largest building in Indianapolis. The storm that hit the downtown area was identified by meteorologists as a derecho. A derecho is a series of fast-moving wind storms or thunderstorms with powerful straight-line winds that can rival the force of hurricane winds. That storm hit downtown Indianapolis late on Sunday, April 2. By Monday, businesses were told that the building was unstable and unsafe for *anyone* to gain entry. In fact, the surrounding streets were also closed off due to falling debris. Over the course of a weekend, dozens of businesses were turned upside down and displaced.

Nearly three months would go by for many of those tenants who were without a place to work and were unable to access their company assets or client files. That Monday morning, the business owners and managers were coping as best they could. Many were hoping that they would be out of their office for just a few weeks at most. Few, if any, realized that it would be months before they could return.

WTHR had a follow-up report when many workers returned to the building to open up their offices and called it a kind of homecoming. That second report was published 10 weeks later on June 10, 2006. They also reported on that day that there were still many offices that remained under repair and unable to open for business.

COVID-19

The 2020 pandemic forced businesses around the globe to close their offices. Most of those businesses either figured out how to work remotely or stopped operations for a period of time. People who thought that such a long-term interruption of day-to-day business couldn't happen to them suddenly found themselves dealing with it as their new reality. This begs the question, how many businesses were ready for an emergency in which the whole company needed to suddenly work remotely?

Best Practices

Get a company continuity plan in place for your business to make sure your company can survive and thrive in case of various types of crises.

Prepping the Whole Team

I have worked on the board of trustees for a nonprofit organization where I and several other board members were tasked to come up with a detailed continuity plan for the organization. A continuity plan is a vital document that outlines various courses of action to help a company not only survive but continue to thrive when disaster strikes. Of course, such plans are something that you want in place before your interruption in business occurs so that you are not left scrambling or arguing over the correct decisions to make in the midst of your crisis event.

With nonprofit or for-profit businesses, putting such plans in place demonstrates good stewardship and that you take your responsibilities to the stake holders of the organization seriously. Part of that plan needs to be a remote work contingency.

A large portion of the workforce already has the ability to work from home due to the proliferation of broadband. In fact, according the US Census Bureau, just prior to the COVID-19 crisis, about one third of workers had worked remotely and roughly half of information workers are able to work from home. However, being able to do work from home on a long-term basis and actually doing so are very different things. Historically, there has been some pushback from management on overseeing a remote and distributed workforce.

MANAGEMENT WORK POLICY

According to the International Workplace Group, an international provider of office space, business lounges, and conference centers, more than 50 percent of companies surveyed in 2019 did not have a remote work policy in place.¹ When asked the reason, they simply cited that it was a long-standing company policy. In other words, they prefer managing their people in person.

Many times, the reason companies avoid working remotely is due to the company culture. There is a camaraderie that comes with being in the same room and bouncing ideas off each other. There is an energy in that room that cannot be duplicated in a video conference.

Other times, remote working is frowned upon due to employer preferences in management styles, and sometimes it is simply that management does not like change. In working with thousands of small businesses across the US, I have seen clients at all management levels resist introducing new technology and new methodologies. Many times, that resistance to change comes in the form of “that’s just how we’ve always done things.”

From the experience of managing my own companies, I certainly understand that initial resistance. Changing processes is a disruption, and it can be uncomfortable to learn new methodologies in day-to-day operations, especially if it makes a dramatic alteration in how a company manages its business.

Some leaders believe the best way they can manage people and performance is in person. There is trepidation in trying a new office format, and there are concerns about a potential loss of productivity during the learning curve of running a company in a new way. But when disaster strikes, we don’t get the luxury of having many choices. When it comes time to adapt workplace operations in an emergency, the situation quickly becomes sink or swim.

IBM and Yahoo!

In the late '90s and into the early 2000s, IBM was making headlines for its progressiveness in allowing a large portion of its workforce to go remote. It added that the profitability of the company had greatly increased due to this strategic move. Having workers go remote reduced overhead by getting rid of 78 million square feet of office space. The company sold off 58 million square feet of that space for \$1.9 billion. By 2009, IBM had 40 percent of its employees working remotely and was considered a pioneer in a remote working revolution.

However, in May 2017, the *Wall Street Journal* reported that IBM was giving its remote work employees₂ a choice: either move back into one of the company’s regional offices or leave the company. The move was intended to increase the speed of productivity and create better collaboration between teams.

In 2013, the new CEO of tech giant **Yahoo!** made headlines when a company memo was leaked. In it, Marissa Mayer abruptly ended the renowned company perk of working from home. Again, collaboration was cited as the main reason for this sudden switch. Here is a part of the memo:

To become the absolute best place to work, communication and collaboration will be important, so we need to be working side-by-side. That is why it is critical that we are all present in our offices. Some of the best decisions and insights come from hallway and cafeteria discussions, meeting new

*people, and impromptu team meetings. Speed and quality are often sacrificed when we work from home. We need to be one Yahoo!, and that starts with physically being together.*³

When these events happened, many large companies followed suit and ended or discouraged work-from-home policies. Companies such as Honeywell, Best Buy, Aetna, and Bank of America all changed their telecommuting policies in order to have better control over the workday and have more face-to-face

collaboration. Does all this mean that remote working is detrimental to a company's efficiency? The short answer is that it can be, but it does not have to be that way. Certainly not anymore.

In the second half of 2020, HR consulting and benefits firm Mercer surveyed 800 employers to ask about the productivity of workers who went remote due to the health crisis. Ninety-four percent of the employers surveyed said that productivity was the same as it was prior to the pandemic, with 27 percent of those reporting that productivity was actually higher. On top of that, 73 percent reported that one quarter or more of their employees would likely remain as remote workers after the pandemic.

In November 2020, a study commissioned by tech giant Microsoft showed similar findings. Boston Consulting Group and KRC Research conducted the study and polled 9,000 employees and managers from large companies across 15 European markets, asking about productivity of remote workers during the pandemic. Thirty-nine percent reported that the newly remote workers were as productive as they were before going remote, 34 percent reported that they were somewhat more productive, and 10 percent stated that they were significantly more productive. So what's the difference between 2017 and 2020 when it comes to the idea of remote work productivity?

Consider the leaps we have taken in residential broadband speeds since 2017. Today there are gigabyte home internet routers and network switches. High-speed cellular networks and 5G can act as backup connections to help keep people working. The technology for remote work today far exceeds what was available in 2017. Another point to take into consideration is that there has been a wake-up moment in management styles due to the COVID-19 pandemic. There is now a deeper understanding of how to create stronger collaborations between teams and how to better use the technology that is available.

TOP CONCERNS OF MANAGEMENT

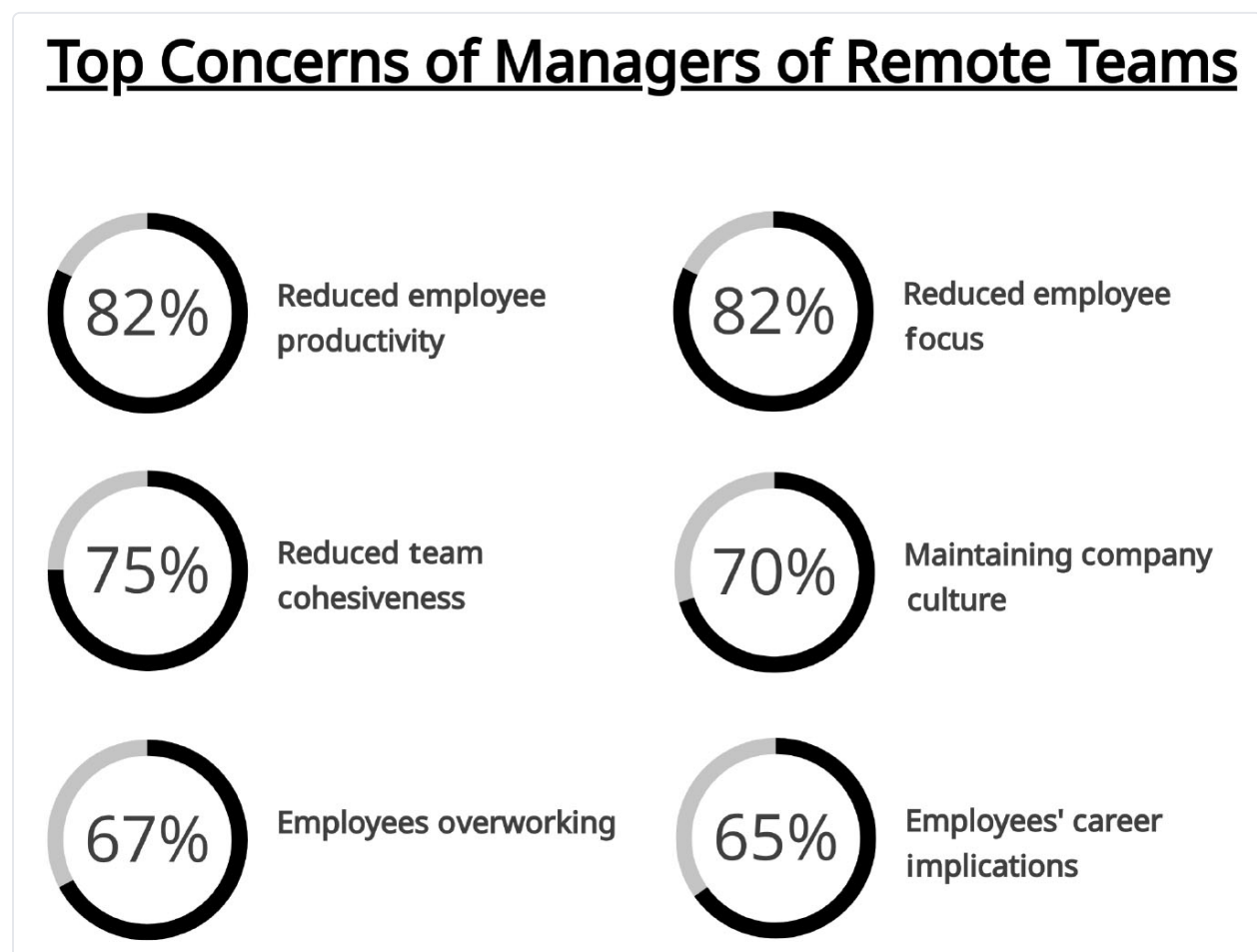
Some of the first concerns managers and team leaders will have will be about functionality, such as how to get the team to function cohesively while separated and how to manage their newly distributed work force. Both of these concerns can be overcome if you don't fight them. Let's take a look at managerial obstacles.

According to 2019 a survey by OWL Labs,⁴ some of the concerns that managers have about a remote workforce include diminished productivity, loss of employee focus, and even concerns about the long-term career goals of employees (Figure 1.1).

The truth is that a good number of managers have some anxiety about managing remote workers. Managerial skill sets get honed by repetition. For years, those management skills relied on large amounts of small face-to-face check-ins and quick meetings with staff members. Many people in leadership positions still gauge dedication by who stays late and who comes in early.

That style of management makes the move to remote working difficult and is the reason many companies chose not have a remote working policy.

FIGURE 1.1: TOP CONCERNS OF MANAGERS OF REMOTE TEAMS



Source: Modified from Owl Labs, *State of Remote Work 2019*, September 2019.

I've had the unfortunate experience of working under managers who were always on the lookout for slackers. Everyone knew that if the manager was coming around, you had to make yourself look