Playbook:

Managing Remotely During Disruption

Research and Guidance for COVID-19 and Beyond

1st Edition April 2020

About this Playbook

One thing that's been noted during the COVID-19 crisis is that many of the business responses are strategies and trends that already existed.

Although it's impossible to know for sure, it's highly likely that when we return to our workplaces, there will still be a significant number of people who will work from home and there will be an ongoing need for the skills to manage people who work remotely.

The resources in this playbook are drawn from existing Brandon Hall Group research, ongoing research related to the COVID-19 disruption and relevant tools and worksheets.

We will update this playbook regularly as organizations continue to manage this new reality.

5 Core Questions About Remote Work During Social Distancing

- ❑ Are we doing enough to support the physical, financial and emotional health of our workforce?

- ❑ Are we creating clear work guidelines and expectations and communicating them consistently and effectively?

- ❑ Are we optimizing the value of employees through virtual work, redirected work or other means?

- ❑ Are we weighing all the potential brand implications of necessary management decisions to minimize business impact?

- ❑ Is there a team working on adapting and implementing new processes and workflows that will persist beyond the current situation?

Core Questions About Remote Work Going Forward

❑ **How will we measure and evaluate the success of remote work and how it has been managed?**

❑ **How will we analyze the cost/benefit of continuing remote work for certain job roles, business units or locations after social distancing restrictions are lifted/relaxed?**

❑ **How should we plan and manage the ongoing transition?**

❑ **Should planning be centralized, decentralized or hybrid?**

Core Questions About Remote Work Going Forward

❑ **How do we ensure planning and administration are inclusive?**

❑ **Which of our management practices over the past several weeks have been most successful and how do we keep the momentum going?**

❑ **Should decisions about remote versus on-site work be made based on business need or safety, or should also there be some flexibility based on job role and employee preference?**

Core Questions About Remote Work Going Forward

❑ **Since some HR policies and guidelines (work at home policies, flexible work hours, benefits, etc.) have been amended during COVID-19, will those policies and guidelines return to their former state, stay the same or evolve over time?**

❑ **What should be the guiding principles for managing the ambiguity of ongoing change?**

Latest Research:

Impact of COVID-19 on Human Capital Management

Extremely Challenging/Challenging Functions During COVID-19

61% Adjusting business operations

50% Employee engagement and productivity

50% Impact of suspension of business travel

49% IT adjustments to expand remote work

47% Meeting customers' needs, answering questions

45% Continuation of scheduled learning and development with VILT and eLearning versus in-person training
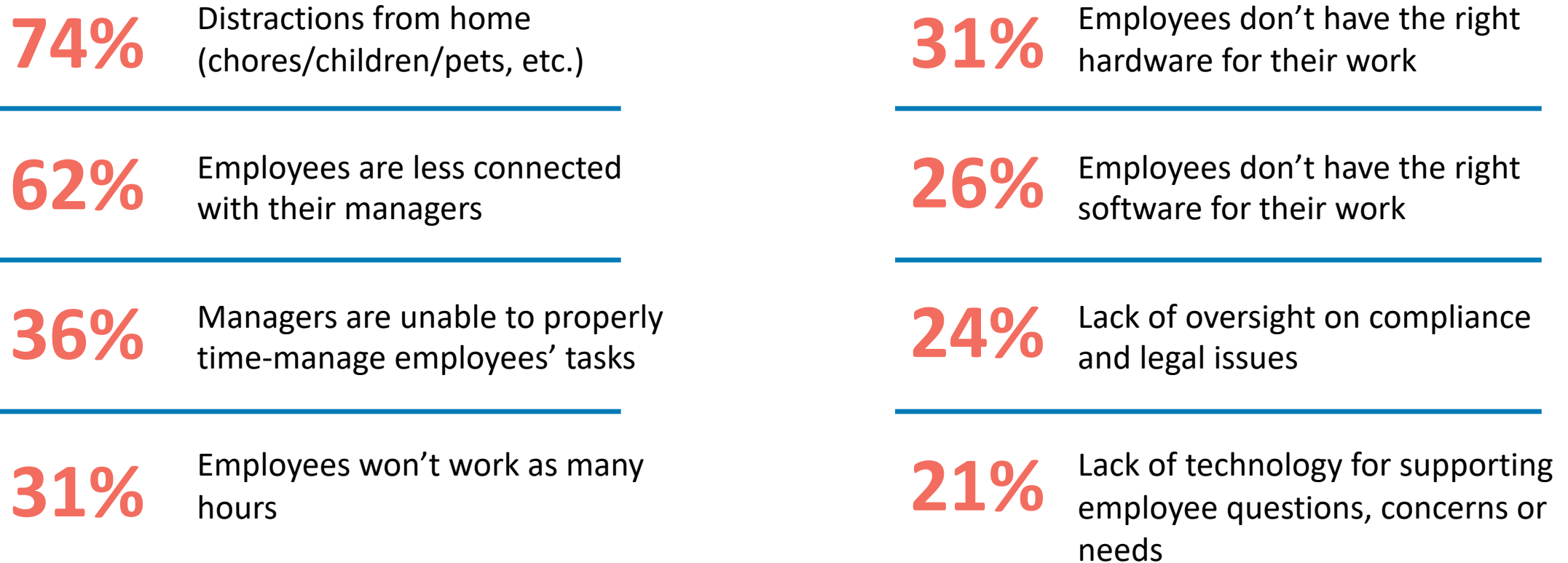
43% Meeting employees' needs, answering questions

42% Job candidate interviewing

Source: Responding to Longer-Term HR Challenges from COVID-19, 4/15/20

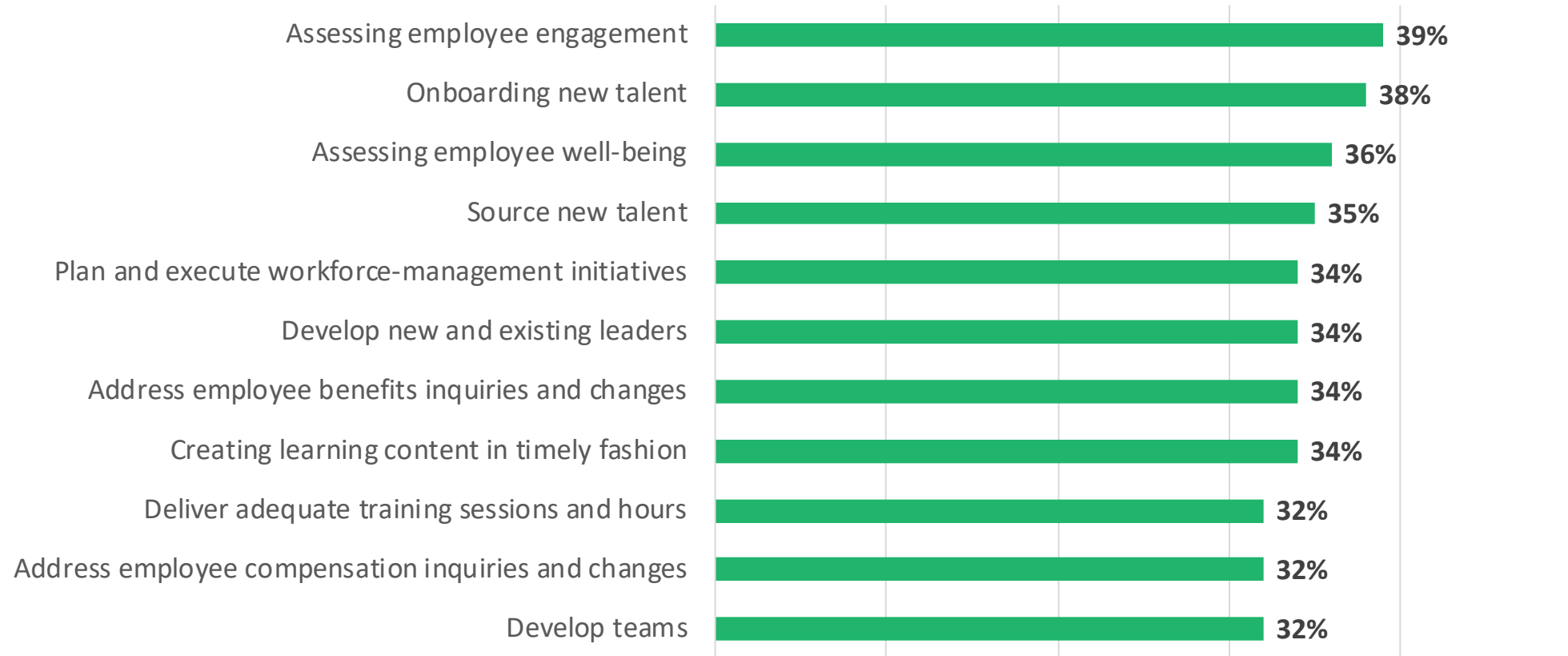# Biggest Concerns About Productivity Loss from Remote Workers

74% Distractions from home (chores/children/pets, etc.)

31% Employees don't have the right hardware for their work

62% Employees are less connected with their managers

26% Employees don't have the right software for their work

36% Managers are unable to properly time-manage employees' tasks

24% Lack of oversight on compliance and legal issues

31% Employees won't work as many hours

21% Lack of technology for supporting employee questions, concerns or needs

Source: Responding to Longer-Term HR Challenges from COVID-19, 4/15/20

Biggest Challenges to Manage HR Functions During COVID-19
## (4 or 5 on 5-point scale)

Challenge	Percentage
Assessing employee engagement	39%
Onboarding new talent	38%
Assessing employee well-being	36%
Source new talent	35%
Plan and execute workforce-management initiatives	34%
Develop new and existing leaders	34%
Address employee benefits inquiries and changes	34%
Creating learning content in timely fashion	34%
Deliver adequate training sessions and hours	32%
Address employee compensation inquiries and changes	32%
Develop teams	32%

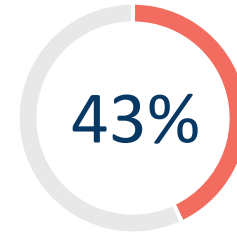Source: Responding to Longer-Term HR Challenges from COVID-19, 4/15/20

Challenges that Can Best Be Addressed with Improved Technology
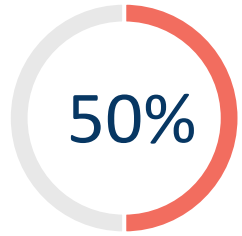
50%
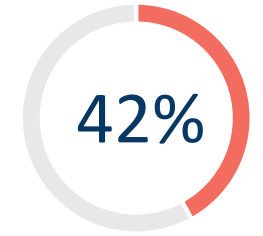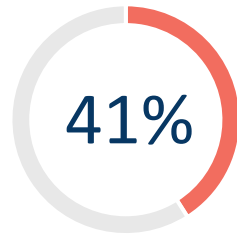Assessing employee well-being

48%
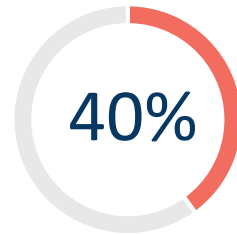Deliver adequate training sessions and hours
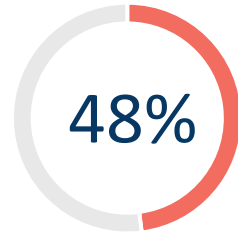
43%
Interview and screen new talent

42%
Create learning content in a timely fashion

41%
Assess employee engagement

40%
Continue competency and skill development
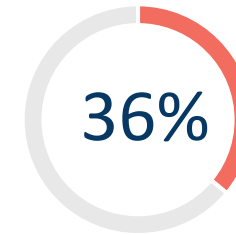
36%
Onboard new talent

Source: Responding to Longer-Term HR Challenges from COVID-19, 4/15/20

Challenges that Can Be Improved with More Time

| Challenge	Percentage
Developing high-potentials and continue succession planning	38%
Develop teams	38%
Create learning content in a timely fashion	37%
Plan and execute workforce-management initiatives	37%
Develop new and existing leaders	36%
Plan and execute workforce-management initiatives	36%
Assess employee engagement	36%
Onboard new talent	33%

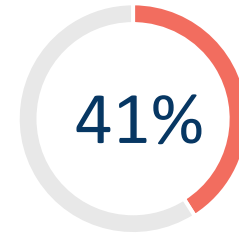Source: Responding to Longer-Term HR Challenges from COVID-19, 4/15/20

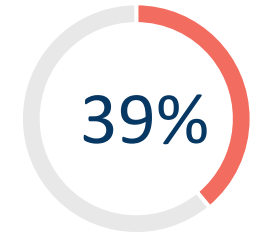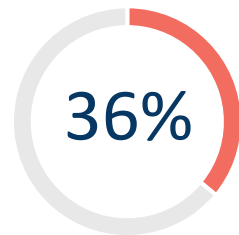# Technology Readiness for Increased Remote Work
(4 or 5 on 5-point scale)

78%
Payroll
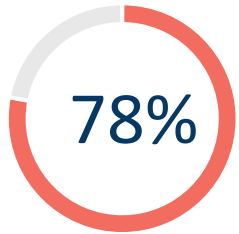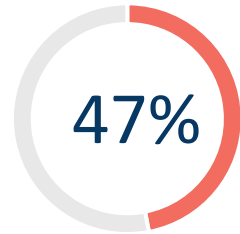
47%
Workforce Management
(T&A, scheduling,
employee self-service/helpdesk)

41%
Learning technologies

39%
Wellness/well-being

36%
Employee self-service/
help desk

36%
Onboarding
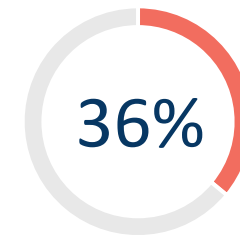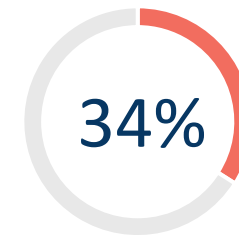
34%
Hiring
(Recruitment marketing, sourcing,
screening, candidate management,
video interviewing)
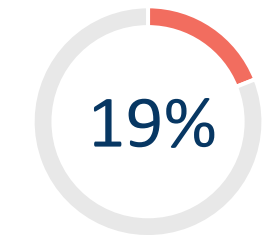
19%
Talent Management
(Performance management,
recognition/engagement, career
development, succession planning)

Source: Responding to Longer-Term HR Challenges from COVID-19, 4/15/20

Employee Readiness to Make Greater Use of Digital Learning

Source: Responding to Longer-Term HR Challenges from COVID-19, 4/15/20

27%
Don't know/
Not sure

57%
Ready

16%
Not Ready
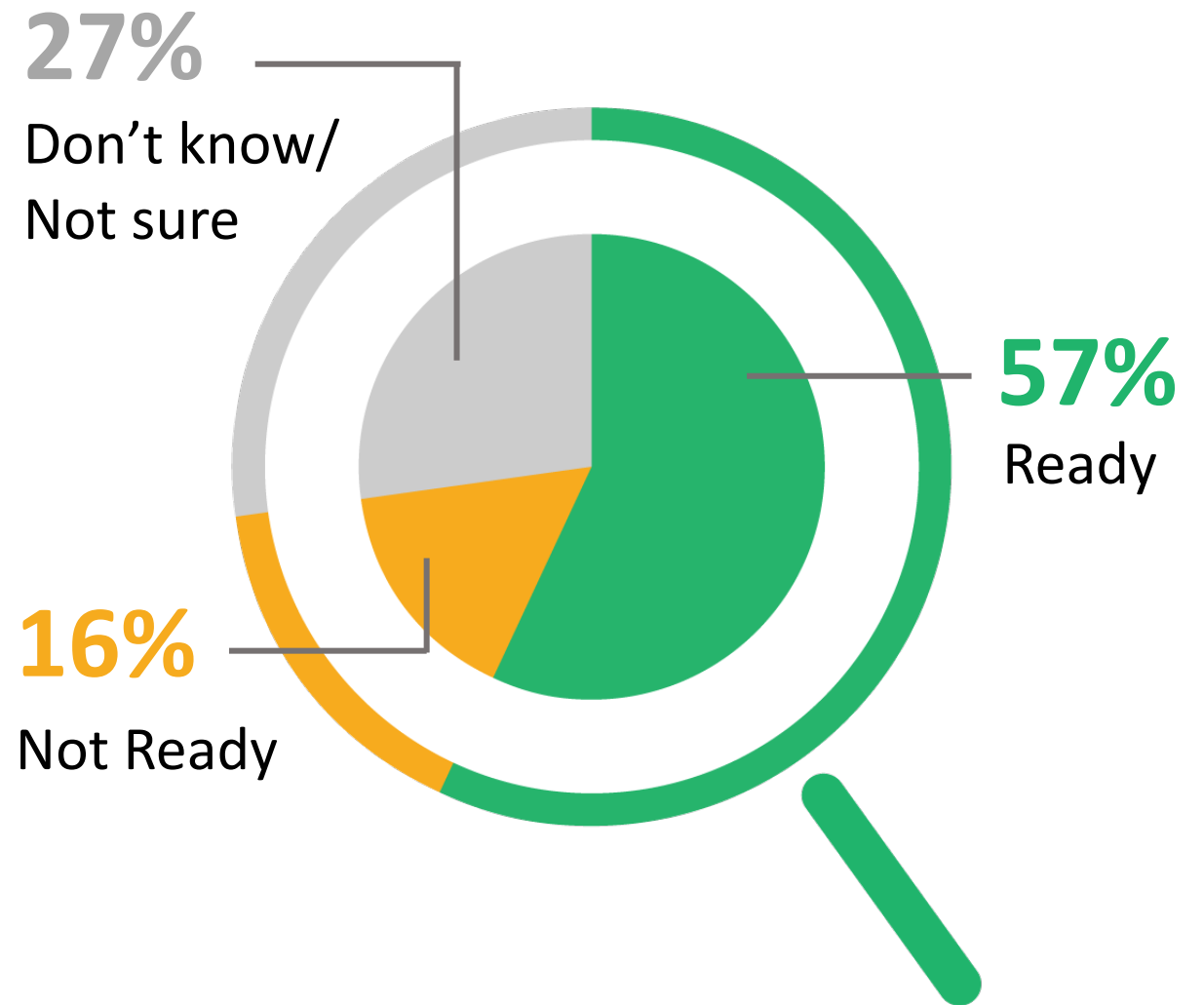
'Go-To' Tools for Converting Live-ILT Learning

71%
Webinars

68%
Conference calls

64%
Video learning

48%
eLearning modules

45%
Social/
collaboration tools

29%
VILT

26%
Microlearning

23%
Online games/
simulations

Source: Responding to Longer-Term HR Challenges from COVID-19, 4/15/20

How Organizations Are Managing

Laboratory for Inclusion

"This pandemic has been a laboratory for working as an inclusive team and valuing differences. This is a great time in the sense that there is a lot of inclusion building naturally in the way things are conducted these days."

— Head of Diversity and Inclusion based in India

Major Insurance Company
West Coast U.S.

LEADERSHIP

- ✓ 100% remote work

- ✓ An Emergency Response Team (ERT), comprised of key leaders, works to ensure all critical issues are addressed, and communication with employees and customers is done in a timely manner.

- ✓ Weekly (virtual) leader meetings

- ✓ Bi-weekly ERT meetings

Major Insurance Company
West Coast U.S.

OUTREACH AND GUIDANCE

- ✓ Daily check-ins between managers and teams

- ✓ Every meeting addresses challenges employees and customers encounter in addition to business-related issues.

- ✓ We encourage employees to talk about their feelings and challenges related to the home-working environment.

- ✓ We provide insights and tips and follow up, if necessary, with individual(s) or provide other guidance or tips.

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SOCIAL COLLABORATION

- ✓ Encourage employees to reach out to each other and to our leaders through our social platforms

- ✓ At noon each day, we spend 10 minutes doing stretching and breathing exercises.

- ✓ Employees are also doing virtual social hours after work; we all share funny stories.

- ✓ Share "above and beyond" stories and spend time with messages of gratitude

- ✓ Employees are encouraged to continue to use their volunteer hours to donate time to virtual- volunteer opportunities.

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West Coast U.S.

RESOURCES

- ✓ Mental-health resources

- ✓ In-home resources for parents with children at home

- ✓ Virtual-exercise resources

- ✓ Links are provided by our benefits providers and other vendors who share information through this crisis.

- ✓ All resources and communications are posted on intranet in a "Business Continuity Resources" file for quick access by employees.

Credit Union

- ✓ Deemed essential business, so employees are on-site and remote

- ✓ Training managers on both social distancing and managing remotely

- ✓ Creating programs for people with decreased workloads, including learning that can help them in their jobs when full workload resumes

- ✓ For leaders, training on how to support employees in whatever situation they are in while complying with social-distancing guidelines — stressing emotional intelligence on handling sensitive employee issues

- ✓ Creating FAQs so leaders have resources related to the new ways of working

Tips and Guidance for Remote Work

These recommendations are gleaned from quantitative Brandon Hall Group research and more than 50 interviews with businesses impacted by COVID-19.

Managing a Remote Workforce Checklist

Help Employees Cope

Everyone is stressed. If possible, dedicate a team of people to help employees. For example, one company repurposed a "life-events services team" that prepares employees for retirement, maternity leave, medical leave and other circumstances. Those people — plus reallocated staff from HR — now handle all questions around the pandemic, including new work situations, sick leave and other matters.

Provide Guidance

We talked to several companies that are putting their employees in new situations, i.e., working from home. They quickly created online guides or short tutorials on topics such as how to use online conferencing tools, how to manage your time while juggling responsibilities at home, coping with isolation, etc. This provides leadership and demonstrates empathy.

Create a Hybrid Communication Strategy

It's not enough to simply communicate "more." You must have a multifaceted communication strategy, including messaging apps such as Slack or Teams, videoconferencing, texting in addition to standards such as emails and intranet portals.

Managing a Remote Workforce Checklist

Create Accountability

Part of helping employees adjust to a new work environment is setting expectations for productivity and performance. With work routines turned upside down in many cases, it is important to establish guidelines for how and when work gets done and upholding quality standards. Include some flexibility, within boundaries, and invite suggestions and feedback.

Ensure Security and Privacy for Remote Workers

During the pandemic, close to three-quarters of organizations shifted a large percentage of their workforce to remote work. In the early going, less than half of those organizations had IT working on securing company data and devices, according to Brandon Hall Group. Data security must be prioritized and ubiquitous with remote work.

Facilitate Collaboration; Create Clear Videoconferencing Policies

Use video-conferencing and social-collaboration tools to keep people working together and staying connected. Employees should have the freedom to meet outside of official virtual team meetings. In those official meetings, determine when/if webcams are required to be on or whether it is optional. Employees can be sensitive about their work environment or appearance.

Managing a Remote Workforce Checklist

Discuss Work/life Integration with Employees

In the words of a medical supply company, "working from home for the first time is like having a new-born — your schedule is unpredictable." New remote workers need advice and guidance — just like new parents do. Post resources to help workers adjust. Consider leveraging remote work veterans to be "buddies" or "mentors" to pass on lessons learned.

Create Schedules for Check-ins

In an office environment, there are a lot of opportunities for spontaneous interaction. With remote workers, those opportunities are naturally not there, so you have to be deliberate in creating chances to check-in with your employees, even for small matters. Check-ins can be by phone or social-collaboration tools, or both, and should be as frequent as practical, especially during initial transitions. Maintaining connections is critical.

Have Social Meetings

In the absence of the proverbial water cooler where colleagues gather socially, create regular events that have nothing to do with day-to-day work. Employees will welcome a chance to talk about literally anything else. Use this time to build relationships that can help everyone as they adjust to new environs.

Managing a Remote Workforce Checklist

Solicit Ideas

In periods of extreme disruption, don't pretend to know all the answers. Ask your employees for suggestions. That communicates, or hopefully reinforces, a commitment to collaboration and teamwork — plus you are likely to get brilliant ideas you hadn't considered.

Welcome Feedback

Not everything will go perfectly. Some people will be critical. Solicit and welcome feedback. A critical component to engagement is employees feeling that they are heard. Soliciting feedback demonstrates your willingness to listen. Also, let employees know how you acted on their suggestions. This is always important, but especially when employees' circumstances are in flux.

Strategies for Improving Employee Experiences

Employee engagement is always important, and especially critical during periods of disruption. Brandon Hall Group defines engagement as the outcome of everyday employee experiences. The following pages provide a self-assessment tool and strategies for improving employee experiences any time, but especially now.

Analyzing Everyday Employee Experiences

Use this grid to think about what great employee experiences look like.

Compare that to the typical experience you offer, then determine any action steps.

We provided some experiences for you, but you can replace them with your own.

Type of Experience	What Great Looks Like	What You Look Like	What to Do
Employee's physical workspace			
Peer interaction/collaboration			
Manager-employee connections			
Company communication			
Tools used on the job			
Technology usability			
Performance goals/feedback/recognition			
Asking for help			
Getting information			
Growth opportunities			

Strategies for Driving Excellent Employee Experiences

Create a Sense of Belonging

Employees want to feel a strong connection to the organization they work for. This is even more important during a crisis. There are many elements to creating a sense of belong, including:

- Connecting with organizational leaders

- Meaningful work that aligns with organizational goals and values

- Listening — and implementing — suggestions and ideas

- Getting frequent and meaningful feedback from managers and peers

- Learning and training opportunities

- Information and assistance to coping with difficult situations. This includes extending mental-health services or other assistance to help with work or personal situations.

Strategies for Driving Excellent Employee Experiences

Connect with Employees

- Purpose

- Accomplishment

- One Another

Strategies for Driving Excellent Employee Experiences

Recognize Good Work, Good Deeds and Good Efforts

Everyone craves recognition. Brandon Hall Group research shows that recognition is most effective when it its performance-based, timely, inclusive and frequent. However, less than half of organizations do any of those things.

Organizations that rate their culture of recognition highly* are:

3 times. more likely to see increased employee retention

2.5 times more likely to see increase employee engagement

*High rating = 4 or 5 on 5-point scale

Strategies for Driving Excellent Employee Experiences

Recognition (continued)

There is no better time to increase the frequency and quality of recognition than during periods of disruption. Employees want a connection to their peers and their leaders, and need to do meaningful work and contribute. It is important to recognize good work and behaviors, such as kindness, empathy, innovation and collaboration that reflect and reinforce organizational values.

This can be done during virtual group meetings or person-to-person. Organizations with rewards and recognition technology have an easier time because they already engage the relevant tools. Showing recognition and appreciation is a foundation for creating great everyday employee experiences.

This is a perfect time to improve recognition, which 79% of organizations rate as important to drive employee engagement.

Strategies for Driving Excellent Employee Experiences

Embrace Employee Development

Personal and career growth are top drivers of employee engagement, according to Brandon Hall Group research. During times of disruption, it's easy to emphasize getting work done so much that employees are not provided the needed opportunities to grow in their jobs.
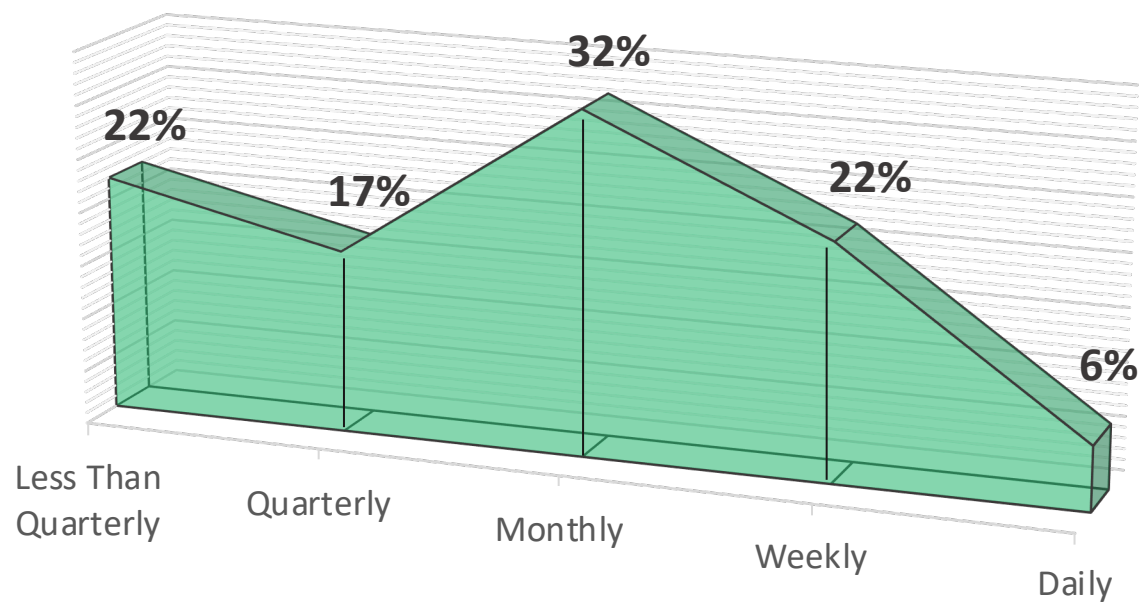
The current environment provides employees with new opportunities to leverage digital learning resources, to adjust to remote work and to enrich themselves, if only for a few minutes at a time.

In addition, regular check-ins — always important and often a struggle for managers to consistently do — are important during disruption, but not only to check on the status of current and upcoming work. Check-ins should be frequent and should include coaching, feedback and career discussions. As the following pages show, frequency and quality of check-ins are not a strength for most organizations. But the new environment provides opportunity for meaningful change that can carry over to whatever new situations the future holds.
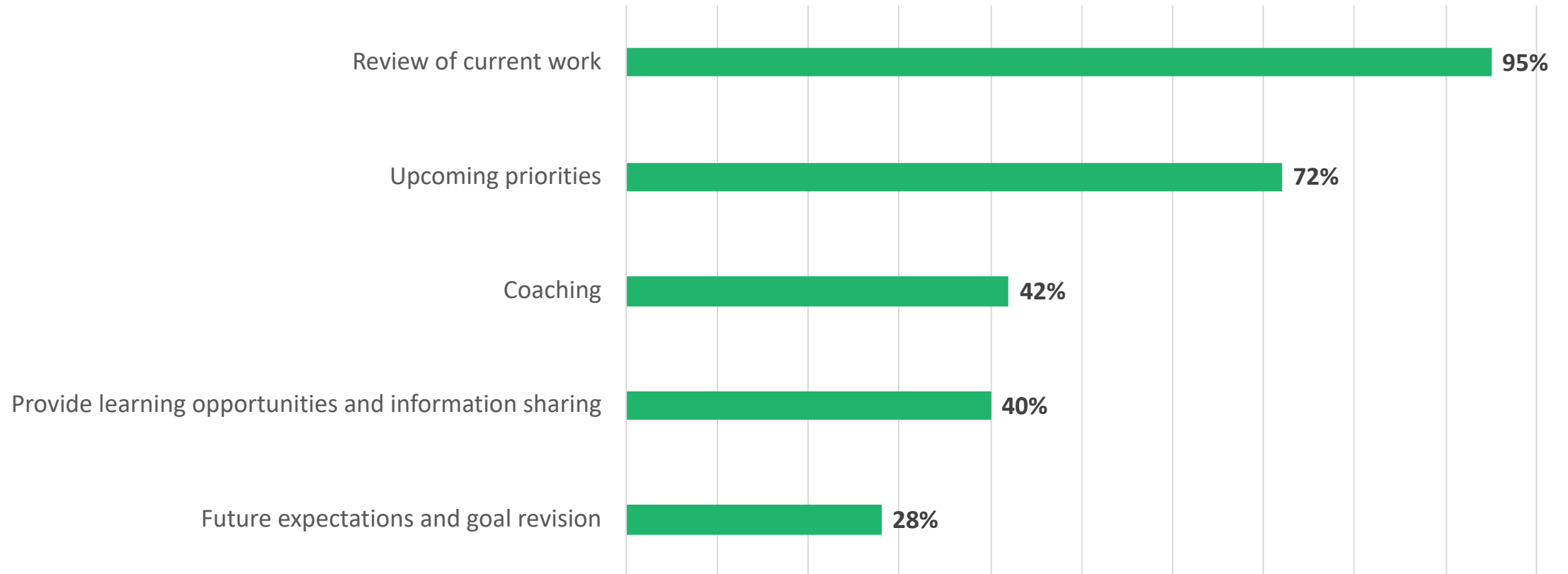
Frequency of Manager Check-ins with Team Members

22%

17%

32%

22%

6%

Less Than Quarterly

Quarterly

Monthly

Weekly

Daily

Source: Brandon Hall Group 2019 Performance Management Study

What Do One-to-Ones Cover?

Review of current work	95%
Upcoming priorities	72%
Coaching	42%
Provide learning opportunities and information sharing	40%
Future expectations and goal revision	28%

Source: 2019 Brandon Hall Group Performance Management Study

Strategies for Driving Excellent Employee Experiences

Give Employees Autonomy to Do Their Jobs

Our world is in flux. It will be impossible to control everything employees do. Give them as much direction as time and circumstance allow, welcome questions, then allow them to do their jobs. Ensure employees know you trust them. It will help you get through this and will create momentum for greater engagement as our work environments evolve.

Managing Change

In the weeks and months ahead, change will be continuous.

In this environment of ever-present and ongoing disruption, it is easy to react to the moment without considering the impact of your actions. Change is made easier by following a simple change-management process.

As your organization looks to transition back to a future inexorably altered by the COVID-19 pandemic, strategic change management will be important. The key is to always understand who your "customers" are and solve challenges from several angles. The tool on the following pages can provide guidance that you can use and build upon.

Change Management Planning Made Easy

CONSIDER THE CUSTOMER

CUSTOMERS/USERS	EARLY ADOPTERS	NAYSAYERS
• Who is the target audience? • What do they need to know? • For whom are we creating value?	• Who is a potential/advocate/ambassador of the solution?	• Who will push back on decisions and actions in implementing the change?

Change Management Planning Made Easy

THE SOLUTION

BUSINESS NEED • What business challenges do you expect the change to resolve?	**UNIQUE VALUE PROPOSITION** • What is the short, compelling "elevator speech" about the benefit of the change?	**OUTCOMES** • What are the top 3-5 challenges the change will solve? • If applicable, what are the top 3-5 talent gaps the change will solve?	**WHAT WILL SUCCESS LOOK LIKE?** • What key metrics will indicate a successful change-management effort?
FINANCIAL ANALYSIS • What are your high-level investment requirements?		**TIMELINE** • What is your timeline? What is your critical path?	
KEY STAKEHOLDERS • From whom do we need to get buy-in? • Which executives and other business leaders do we need to champion our case? • Who will be the executive sponsor?		**KEY RESOURCES** • What are the key processes (including governance) and technologies we need to execute the change?	

Final Words

Create a Culture of Psychological Safety

When employees feel safe, they relax, are more open-minded, resilient, motivated and creative.

That's what employers need. Now, most workforces are stressed to the max and largely disengaged. That needs to change quickly. Creating a culture of psychological safety is the key to success in the 2020s.

Source: Brandon Hall Group HCM Outlook 2020 Report

Author and Contributors

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Rachel is responsible for business operations, including client and member advisory services, marketing design, annual awards program, conferences, and overall accountability for the company's project management function. Also, she leads initiatives covering Advancing Women in the Workplace and Diversity and Inclusion research and events. Rachel has worked in the HCM research industry for fifteen years and has held several key management and executive positions within Talent and Learning Research and Performance Improvement Industries.

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His expertise includes data and analytics, performance management, recruitment, acquisition, retention, and attrition. He also served as the HR leader for a Boston consulting firm.

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Prior to joining Brandon Hall Group, Mike was the Chief Executive Officer and Co-founder of AC Growth. Mike has held leadership and executive positions for the majority of his career, responsible for steering sales and marketing teams to drive results and profitability. His background includes more than 15 years of experience in sales and marketing, management, and operations in the research, consulting, software and technology industries.

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Richard Pachter edited this report. He is the Content Manager at Brandon Hall Group and is responsible for editing content. He has experience as a journalist, copywriter, editor, marketer, blogger and social media marketing manager.

Emma Bui, Graphic Design Associate
Emma Bui creates graphics and layout for this report.

About Brandon Hall Group

With more than 10,000 clients globally and 25 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

Some ways the we can help…

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Includes research library access, events, advisory support, a client success plan and more.

STRATEGIC CONSULTING

An array of benchmarking, strategy, technology selection, and integration.

EXCELLENCE AWARDS

Global recognition showcasing leading programs and practices with a library of case studies.

PROFESSIONAL DEVELOPMENT

Virtual and on-site certification programs supplemented with research-driven assessments and tools.

ORGANIZATIONAL EXCELLENCE CERTIFICATION PROGRAM recognizes world-class HCM programs that transform their organization and achieve breakthrough results. This designation is the next step beyond the HCM Excellence Awards, which focus on a single program, and looks at the department as a whole.

SMARTCHOICE PREFFERED PROVIDER PROGRAM uniquely places HCM service and technology companies at the top of organizations' consideration list of vendors. It adds an unmatched level of credibility based on BHG's quarter of a century's experience in evaluating and selecting the best solution providers for leading organizations around the world.