



Successful Shift to Remote Work: **Your Checklist**

General Organizational Tips

- ☐ **Group all staff roles into three categories** and develop custom policies for each group:
 - ☐ Identify people who can work remotely 100% of the time
 - ☐ Determine who cannot perform their duties remotely
 - ☐ Decide who will work remotely at least in some capacity
- ☐ **Conduct an equipment survey** to understand who needs better work gear.
 - ☐ Streamline and simplify the approval process for taking assigned laptops and other personal devices home.
 - ☐ Ensure that your teams have access to high-speed Internet at home. If not, provide an additional allowance for that.



Pro tip: Ask your teams to send a snapshot of their [Internet speed test](#) to determine who needs an upgrade.

- ☐ **Create corporate and personal security guidelines** for remote and on-premises employees to ensure proper usage of company assets.
 - ☐ Make two-factor authentication (2FA) mandatory whenever possible.
 - ☐ Provide VPNs to your teams whenever needed.
 - ☐ Grant secure access to remote desktops and other software.
- ☐ **Develop several communications plans** to keep the workforce updated on recent developments:
 - ☐ Company-wide
 - ☐ Department-wide
 - ☐ Teams/group/individual updates



What To Say To Your Employees Regarding COVID-19?

- **Share the official facts.** Provide official statistics and healthcare recommendations from official sources only such as CDC, WHO and your Country Health Department.
- **Explain what your company is doing to take care of the employees.** Articulate what preventive and protective policies you have in place.
- **Describe the impact on your operations.** Briefly explain what changes are happening and how these will impact your people.
- **Summarize the main work-from-home policies** for those, who will be telecommuting full-time or part-time.

Teams & Department Communications

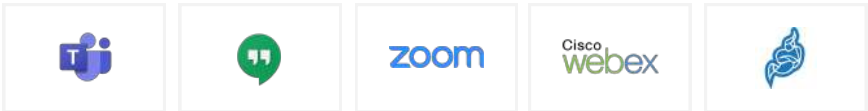
Decide on which communication apps your team(s) will use. Ensure that all of them are installed and properly configured.

Our top suggestions:

Chat/Messaging:



Video conferencing:



Project Management:



File Management and Sharing:



Sample Communications Plan for a Remote Team

- 1. Weekly team kick-off meeting (30-45 mins, Mondays)** — a quick team-wide check-in to ensure alignment. Have your team members update others on their progress and blockers. The goal of this meeting is to ensure that everyone understands the strategic goals and makes progress towards them.
- 2. Daily standups. (15-20 mins, Tuesday-Friday)** — best scheduled in the mornings, use these quick meetings to check-in on your team's progress. In particular, ask every person to briefly write or tell:
 - Yesterday's tasks
 - Expected progress for today
 - What's blocking them
- 3. End-of-week retrospective (30 mins, Fridays)** — use this meeting to improve cross-company collaboration and transparency. Share updates on cumulative progress including achievements from other teams; make important updates and provide a quick roll-up summary on business progress.

Bonus Communication Tips

- Post important corporate updates to broader communication channels (such as your #allstaff channel on MS Teams).
- Encourage informal video gatherings such as virtual after hours, coffee dates or lunches to stave off social isolation among your teams.
- Proactively ask your team to share any feedback on remote work and respond to the provided feedback.
- Avoid micromanagement at all costs.



Conduct Orientation Training

To ease the transition to remote work, create a 45-minute webinar explaining the core topics such as:

- ☐ **Home office setup 101:** include tips on how to best set up the light, avoid distractions and configure the workspace.
 - ☐ Crowdfsource a list of battle-tested office equipment worth purchasing (e.g. best chairs, monitor stands, etc.).
 - ☐ If the budgets permit, provide a small allowance to junior peeps who need to upgrade their home office equipment.
- ☐ **A general overview of all online software and tools** at their disposal. Include a brief how-to on getting started with each one. Or leave links to additional training materials.
- ☐ **How to stay productive.** This module should list some of the essential best practices such as:
 - ☐ How to set the optimal work hours to avoid burnout
 - ☐ What are reasonable response times
 - ☐ When to take a break
 - ☐ How to impose a closed-door policy to avoid at-home distractions
- ☐ **New communication policies and tools** — provide a brief walkthrough.
- ☐ **Where to get help** — specify key contacts for different issues such as general troubleshooting, equipment requests, etc.



Pro tip: Create FAQ based on most frequently asked questions and share with everybody after the meeting.



Cybersecurity

- ☐ **Verify that all the corporate devices:**
 - ☐ Come with the latest OS version installed (with automatic updates enabled and operational)
 - ☐ Have the latest antivirus software (with automatic updates enabled and operational)
 - ☐ Have data-encryption enabled on boot and rely on strong passwords
- ☐ **Conduct a complete inventory** of remote devices authorized to connect to company systems. Capture Ethernet MAC addresses to match authorized devices to authorized users.
- ☐ **Provide access to a business-grade VPN** and verify that you have sufficient licenses for all the people working remotely.



Pro tip: Share the guide of the most critical security threats that every employee should be aware of at this time.

- ☐ **Develop and implement new remote security policies** that would include the following:
 - ☐ All external hard drives (such as USB drives) must be encrypted. Prohibit usage of thumb drives that are not company issued
 - ☐ For employees with high security privileges, install data loss prevention software to prevent data exfiltration
 - ☐ Instruct everyone to conduct regular data backups
 - ☐ Enforce a stronger password policy
 - ☐ Run a quick workshop regarding phishing and social engineering attacks
 - ☐ Enforce two-factor authentication using smart cards or security keys



Infrastructure

- ☐ **Verify that you have sufficient bandwidth** to support new traffic patterns.
 - ☐ Negotiate an upgrade with your Internet Services Provider (ISP).
 - ☐ Adjust resources provisioning for core remote tools and platforms.
- ☐ **Configure firewalls, networks, collaboration apps, and servers** to accept remote connections over the Internet (without having to go through the company network).
- ☐ **Review your disaster recovery plans** in case of on-site infrastructure failure.



*If you don't have one, you should **rush** to develop it!*

- ☐ **Ensure that you have local backups of your key services** so that your teams can continue working even if there are some lags due to higher external traffic.

Stay safe and productive!

