

In the Workplace Building Remote Working Guidelines



COVID-19

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For teams to be truly effective, they need to be fully committed and engaged to a shared purpose. This is even more imperative when a team is working remotely.

In 2019, RBC Wealth Management initiated a "Distributed* Working Programme" for its offices in the British Isles. The preparation for this proved beneficial when the coronavirus lockdown began, and offices moved to remote working.

Through this process, RBC has pulled together a series of tips and considerations that can help create a seamless transition.

What to consider...

- Everyone on a team needs to be fully committed and engaged to a shared purpose.
- Individuals must be clear on how their role, and their team's purpose, aligns with the firm's strategy.
- Creating a set of guiding principles and including these in team charters can ensure best practice is applied across teams and / or jurisdictions.
- A designated leader is central to ensure consistency in messaging and support.
- How could your working practices change to ensure you become more effective and are accountable to each other through enhanced communication, collaboration and planning.

How to become a truly effective remote working team

Consider the role each member of the team will play, and their impact on the rest of the team.



- Clear **vision** and **strategy**
- Embedded **values** and **culture**



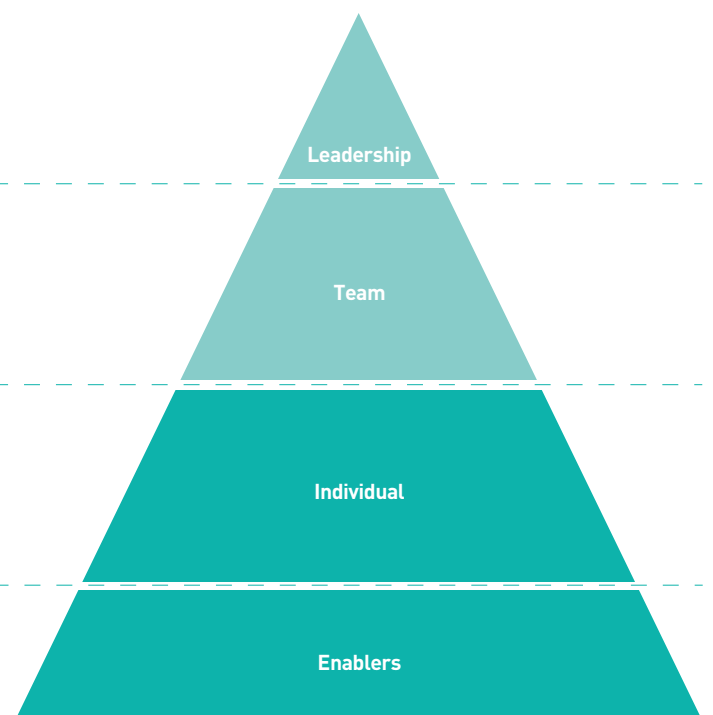
- Clear **purpose** and **vision**
- Clear team **accountabilities** and **interactions**
- Simple and well understood **ways of working**
- Composition (competencies and characteristics)



- Clear **role definition**
- Clear **individual accountabilities**
- Managerial and co-worker **support**



- Positive, constructive and adaptable **mindset**
- **Technology**
- **Streamlining** of procedures - i.e. reduction of paper based processes, digital signatures, email approval, and Webex training verified for CPD



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Guiding principles

Consider the principles that will guide your team as they embrace remote working, and the practical applications.

Principles for Effective Teams



Set a clear and compelling vision and strategy



Live the values and embody the behaviour expectations of the business



Alignment and consistency of leaders



Trust and mutual understanding within your team and other teams



Understanding of individual roles and responsibilities



Timely and accurate communication supported by the right tools

Practical Application

- Non contractual
- Pre-notification
- Team Coverage
- Phones diverted
- Maintain log/diary on team whereabouts
- Attend key meetings in person
- Agreed usage of communications tools
- Flexibility on both sides

Enablers



Our positive, constructive and adaptable mindset



Our gradual approach to transition

Define your approach

Bring people along on a journey, remove blocks and provide support and guidance to teams and individuals.

Team and Culture

Changing behaviours and the way in which teams and individuals interact when they are not co-located.

- How are your teams aligned to the business' strategy and purpose?
- Host workshops with management teams and cascade messages.
- Create Team Charters, including Remote Working Guiding Principles.
- Arrange periodic follow-up sessions.

Tools and Technology

Facilitate remote working through a virtual desktop, building familiarity with all the available tools.

- Do you need to revise your IT service model to ensure issues raised by remote workers are resolved quickly and efficiently?
- Schedule IT "Drop In" sessions to address any questions individuals have.
- Provide a "Top Tips" document for easy reference.

HR Guidance and Support

Assess suitability of roles for remote working and supported teams for the transition.

- Create a HR guidance document for remote working.
- Host roundtable sessions with team leaders to discuss potentially difficult situations, e.g. poor performance.

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Creating a “Way of Working” team charter

Creating a team charter can help provide clarity for all members of the team. For RBC, their “Way of Working” team charter outlines seven key considerations:

	Considerations	Notes
Shared Principles	Eligibility	<ul style="list-style-type: none"> Discussed and agreed with team lead Factors: Individuals’ performance, probationary period, appropriate workspace, suitable equipment, etc.
	Scheduling and Availability	<ul style="list-style-type: none"> Pre-agreed and communicated in advance - How will you do this? Availability should be known across team - Consider shared calendars Remote working is not an excuse to decline or defer meetings Individuals should be available via normal communication channels: Email, Phone, Webex Teams, etc.
	Frequency	<ul style="list-style-type: none"> Guidance on number of days per week for individuals to work remotely
	Coverage	<ul style="list-style-type: none"> Detail team presence required in the office at any one time Plan if coverage is not met due to unexpected absence (travel issues, team member/s falling ill) - e.g. Individuals WFH may be asked to come in to the office at short notice
	Technology and Support	<ul style="list-style-type: none"> Phones diverted - Forwarding of calls must be done to a suitable device; not to phones that can be accessed by other individuals Individuals should have suitable kit, equipment and necessary programs to work effectively - These should be tried and tested Ability to access technical support if needed
	Communication, Governance and Team Meetings	<ul style="list-style-type: none"> Communication is of increased importance in distributed teams Do we need any new communication channels or governance forums to be created? What processes, procedures and ways of working could be improved? Do we need any additional new ones? Details of expectations for attendance at meetings and training - i.e. Mandatory/Non-mandatory and Face-to-face/Remote
	Communication Tools and Systems	<ul style="list-style-type: none"> Consider appropriate tools and systems for different interactions - e.g. Email vs chat functionality

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The Five Pillars

Five pillars that are key to implementing a successful change are:



Awareness



Desire



Knowledge



Ability



Reinforcement

These should guide the necessary tasks and activities to ensure a smooth transition with maximum engagement. For RBC, these included:

	Awareness	Desire	Knowledge	Ability	Reinforcement
Activities	<p>Employee awareness of the changes to increased distribution; Awareness created through:</p> <ul style="list-style-type: none"> • Remote working workshops and team charters • Town Halls and Team meetings • Newsletter communications • Follow-up team sessions • Employee briefings 	<p>Ensure that employees are willing to make the changes by communicating from the top down:</p> <ul style="list-style-type: none"> • Focus on the benefits – commute, work life balance • Emphasise that remote working will be encouraged but not mandatory • Maintain communication channels when distributed • Seek feedback and rapidly resolve challenges 	<p>Added to the Awareness, also provide information to employees via:</p> <ul style="list-style-type: none"> • IT Drop-in sessions • Round table sessions for team leaders to provide support and address potential concerns 	<p>Ensure employees have the tools to enable them to make the change:</p> <ul style="list-style-type: none"> • Use of virtual desktop • Changes to IT support model • IT kit where required, e.g. pooled / shared laptops • Information session on applications, tools and software to facilitate remote working and enable collaboration 	<p>Continual messages of encouragement from the top down:</p> <ul style="list-style-type: none"> • Town Hall updates • Team meetings • Focus from senior staff with influence to communicate messages • Follow-up remote working team sessions

Together we achieve more.

Information kindly provided by
RBC Wealth Management



Wealth
Management

Please contact us at
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for help and support.

