Setting Remote Working Up For Success

VITAE CONSULTING
ORGANISATIONAL PSYCHOLOGISTS

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1. Background

Trainers' Learning Skillnet (TLS) is a learning network for organisations focused on the HR and Learning & Development profession. Together with the Irish Institute of Training & Development (IITD) it is concerned with responding to the business and skills needs of organisations and provides a forum where organisations can develop the skills of those in the learning and development profession.

Responding to a growing need to provide training support for organisations, managers and individuals in the area of Remote Working to deal with the challenges of setting remote working up for success, Vitae Consulting was commissioned to research, develop and design a training program for Remote Working stakeholders.

The research stage of the project sought to combine; existing academic and corporate research in the area of Remote Working with qualitative interview data from stakeholders in the Remote Working area including; remote workers, managers, HR and senior management across sectors.

The second stage of the project sought to combine the information and experience gathered in stage one to develop a series of Remote Work Training programmes to meet the needs of the identified stakeholders; remote workers, managers and HR/L&D professionals.

The third and final stage of the project will see the roll out of three specific training program pilots in early 2020.

2. Report Overview

This report is designed to offer an overview of the research carried out as part of stage one of the process; highlighting insights and areas for consideration in informing the formulation of training programmes for delivery.

The first half of this report briefly sets out findings from existing research and literature in the area of remote working. Initial research focused heavily on the opportunities, potential challenges and practical considerations surrounding remote working. This research was informed by academic research, existing reports and government and public policy in the area of remote working.

The second half of this report presents the findings of qualitative interviews in the area of remote working practice. Interviews were carried out with organisations, individuals, managers and HR professionals to garner their experience of remote working. As with the initial research these interviews focused heavily on the benefits and challenges experienced by these organisations in relation to the implementation of their remote working practices.

In conclusion, the report outlines the proposed training content for each stakeholder group and indicates the format in which this training may be delivered.

3. Background to Remote Working in the Irish Context

The Irish economy has made an impressive recovery from the downturn that followed the financial crisis and is currently performing strongly. Nowhere is this progress more evident than in the labour market. At almost 2.28 million there are more people employed in Ireland now than ever before.

Globally we are experiencing a fourth industrial revolution where the impact of digitalisation is advancing in new and unanticipated ways. This will entail fundamental changes in many occupations that exist today, and the creation of entirely new roles and ways of working in the workplace.

A recent study estimated that the average Irish worker faced a 46% probability of being automated by the 2030s. While there is ongoing debate about the scale and timing of automation's impact in the workplace, it is generally acknowledged that technology is going to significantly alter many occupations and create new ones which will demand different skills in the near future.

This level of disruption means that Ireland must prepare for the impending upheaval. Indicators suggest that we are not currently well equipped for this level of disruption. For example, according to the Digital Economy and Society Index (DESI), in Ireland 48% of the population have at least basic digital skills as against the EU average of 58 % (recent report published by the Expert Group on Future Skills Needs (EGFSN) assessing the impact of Digitalisation on Ireland's Workforce.

As part of addressing this challenge we need to enable enterprises, and SMEs in particular, to invest in upskilling/re-skilling their workforce, including their managerial capacity so as to enhance and maintain productivity, adapt to technological disruption, and identify and exploit emergent opportunities from digital economies. Advanced cognitive skills, problem solving, logic, social and emotional skills are particularly important in the development of competences needed to adapt to and respond to the changes that may occur due to technological advancement. Students and learners at all levels of the education and training system need to be given the opportunity to acquire these skills both during their initial formal education and throughout their working lives.

Several interconnected Government initiatives are underway to ensure Ireland remains economically viable and responsive to the changing nature of work. One such initiative is 'Future Jobs Ireland' which is aimed at ensuring Irish enterprises and workers are well-placed to prosper in the rapidly changing global economy.

This training reflects a need identified by TLS and IITD in relation to supporting enterprises and SMEs in transitioning to and embracing the opportunities presented by ICT in relation to remote working.

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Varieties and degrees of remote working can exist within organisations. However, locational flexibility remains common to all forms and definitions of remote working. In general, employees are engaged in *remote work* when they are working in a physically separate location from their manager and co-workers (Magazine, 2001; Staples, 2001).

Remote working also referred to as *locational or spatial flexibility* relates to the choice of working location and varying the geographical location of the workplace to meet the changing needs of employers and or employees. Such flexibilities include e-working, remote working and teleworking. Remote Working is a comparatively new form of flexible working which is rapidly developing in line with technological advances.

In some instances, *locational flexibility* can be coupled with *temporal flexibility* relating to variations in the number of hours worked. This type of flexibility is by far the most commonly recognised form of flexible working at present in Ireland. Relevant flexible work arrangements include less than full-time working (including job-sharing and other forms of part-time working), flexitime, career breaks and term time working.

For the purposes of this report we will be focusing solely on *Locational/Spatial Flexibility* and the challenges and potential benefits seen with this. However, it is noteworthy that both locational and temporal flexibility can co-exist within roles. Additionally, both partial and fully remote roles can co-exist within an organisation and equally remote workers can be employed by fully remote or partly remote organisations.

5. Prevalence and Predictions for Remote Work in the Irish Context

Ireland has often been presented as a country with strong drivers towards high levels of e-working including a young workforce, a large ICT sector, a proactive government, high property prices and urban traffic congestions. A recent IBEC HR Review found that 39% of organisations indicated that they now have increased flexibility of work locations with 16% indicating that the intend to introduce this flexibility in the next 12 months and 45% indicating that they do not have flexibility of work location in place or that it does not apply, given the nature of the work.

A recent survey by Three Ireland found that currently, the majority (58%) of employees are not permitted to work from home. For those who don't have the option to work from home, almost two-thirds (64%) felt that having this opportunity would improve their work-life balance, and more than half (59%) believed they could be more productive. However, most people (55pc) did not expect that they could realistically work from just anywhere.

From a talent acquisition perspective, the appeal of remote work seems to be growing. Job-listing search engine Indeed, found that the number of Irish people searching for jobs including the word "remote" surged by 171 per cent in late 2017. A general drive towards flexibility in the emerging millennial population has been noted. In a recent survey by Aviva 2019, 21 per cent of millennials (under 35), indicated that they would choose flexible hours as their first preference employment benefit, which is significantly more than their older counterparts, with 17% of 34 – 50-year olds and 16% of those aged 50+ choosing this option.

For employers, one of their most pressing concerns in the current labour market, is the attraction, engagement and retention of quality staff. In the most recent IBEC HR Review (2019) three top priorities were identified for HR for 2019 based on research from the Irish Labour Market. These were; attracting the right employees, retention of employees and employee engagement. From a HR perspective, the CIPD 2018 HR practices survey of over 500 HR professionals revealed that increasing agile/flexible work remains a top priority for Irish firms over the next two years.

Aside from access to talent a recent ESRI study showed that job stress in Ireland doubled between 2010 and 2015. As HR struggles to both retain and engage top talent all measures to both reduce job stress and enhance engagement must be considered. Flexibility in relation to remote working offers a validated option for organisations with numerous studies showing the effect of flexible and remote work arrangements on reported employee stress, absenteeism and morale[1].

Combined indicators appear to point towards a growing interest to opportunities presented by Remote working however adoption of Remote working remains conservative particularly in the SME sector.

6. Opportunities presented by Remote Working Practices

(i) For Employees:

The potential advantages of some form of remote working for an individual generally centres around increased work-life balance. Survey evidence indicates that, from the employee's perspective, remote working can result in increased motivation and job satisfaction, and the ability to balance more effectively work and family responsibilities[2], higher productivity due to reduced distractions, reduced stress, less wasted commuting time and greater work-life balance[3].

Increased job satisfaction and engagement is also noted in populations of employees with high levels of perceived workplace flexibility[4]. In congested urban areas increased remote working and workplace flexibility significantly reduces the impact of long commutes on employees.

Additionally, the rise of remote working has presented greater access to employment from more diverse working populations.

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[1] Emmott and Hutchinson (1998)
[2] Voydanoff (2002)
[3] Timbal and Mustabsat 2016, Grant et al 2013
[4] Fynes et al. (1996)

(ii) For Employers:

A business case for remote working also exists. Studies have observed reduced turnover[5], increased employee motivation and job satisfaction[6] and increased performance[7]. Remote work also allows employers greater access to more diverse labour markets and an opportunity to Reduce Operating Costs[8].

A two-year study by Stanford University found that there was an impressive increase in work productivity among people who worked from home. The study of 500 people who worked both remotely and in a traditional setting concluded that the productivity among home-based workers was equal to a full day's work each week.

A Deloitte Millennial survey from 2018 found that approximately 62% of Irish millennials report some degree of flexible working in their organisations. The greater the deployment of flexible working, the greater the benefits. Those working in highly flexible Irish organisations are reporting high levels of positive impact with the most significant difference in engagement (79%).

Research has also indicated that organisations can benefit significantly from the very existence of workplace flexibility and remote working policies with significant correlations shown between perceptions of workplace flexibility and engagement and satisfaction of employees. As such the very existence of an explicit openness and culture supporting flexibility and remote working can enhance employee well-being regardless of whether these options are availed of or not[9].

7. Challenges presented by Remote Working Practices

(i) For Employees:

Based on findings from the countries where information is available, several aspects have been identified that can pose a risk for workers' health and well-being: work intensification[10], work–life interference associated with the blurring of the boundary between paid work and personal life; isolation; and potential discrimination[11].

Reduced organisational visibility and access training has also been cited by employees as a significant disadvantage of remote working in some organisations.

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[6]Moen, Kelly and Hill (2011)
[6]Groenewegen& Hutten 1991
[7]Bloom et al (2013),
[8] Emmot & Hutchinson 1998
[9]Frone& Yardley (1996) Hill, Miller, Weiner &Colihan (1998).
[10]Kelliher& Anderson (2009)
[11] Brewster (1998)

(ii) For Organisations:

Concerns for employers in relation to such initiatives can include increased training costs, higher direct costs (part timers who receive pro-rata benefit), communications difficulties, and the increased challenges presented by managing a flexible workforce[12].

Organisations such as Yahoo and IBM have cited reduced engagement and collaboration as reasons for withdrawing remote working arrangements in their organisations. From an employer perspective, much has been noted in the research in relation to the mindset shift required in managing employees outside of the traditional 'line of sight' type management and the adaptation required to a 'task based' approach to management.

A study of Irish workplaces examined the impact of different types of workplace flexibility on two specific employee outcomes; work pressure and work-life conflict. Using data from the first national survey of employees in Ireland in 2003, the results of the study showed that while part-time work and flexi-time tend to reduce work pressure and work-life conflict, working from home is associated with greater levels of both work pressure and work-life conflict[13]. A challenge lies herein in how employers can mitigate some of the risks that can occur with Remote Working Arrangements.

8. Practical Considerations

(i) General Legal Considerations

In addition to a clear understanding of the changing contexts within which Remote Working measures are introduced, any responsible discussion of the potential development of Remote Working Policies must also take note of a number of important legal dimensions to this type of working arrangement.

- **Promotion:** A change in working patterns should not alter an employee's entitlement to apply for and obtain promotion. The same selection criteria must be applied to all workers, whether part time or full time and whether availing of Remote Work or not. Where seniority is a factor in promotion, how this will be dealt with in relation to workers availing Remote Work should be addressed in any agreement on Remote Working.
- **Recruitment / Job Selection:** Potential and new employees should be advised of the existence Remote Working and, in the case of new employees, the eligibility criteria and process for instigating such practices[14].

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[12] Emmott and Hutchinson (1998)
[13] ERSI Working Paper 189, 2007

[14] A recent Equality Officer's Decision recommended that " advertisements for posts state quite clearly whether full-time attendance is necessary, where that is relevant. It is a fact that many employers... now allow flexible attendance patterns, and the employer cannot just assume that potential candidates will be aware that full-time attendance is required unless it is specifically stated." *(See ODEI decisions in the Resources Section, Leon v IPA and Burke v NUI Galway).*

- **Redundancies:** Selection for redundancy should not discriminate against workers availing of Remote Working[15].

- **Training:** Workers availing of Remote Working must continue to have access to and be provided with all relevant training. Where possible, training should be organised during the worker's normal hours of work[16].

(ii) Suitability of job/individual for Remote Working (RW):

Not all jobs or workers are suited to Remote Working. The suitability of a job or employee depends on a range of factors. Jobs suitable for Remote Working include those involving a high degree of information processing, clearly defined areas of individual work, and work where there are clear objectives, measurable outputs and minimal requirements for supervision.

Depending on the nature of the work the following personal attributes and skills may be particularly relevant:

- decision making and problem-solving skills
- time management skills
- self-discipline and motivation
- strong communication skills; written and oral
- experience of autonomous working
- ability to cope with reduced social contact

Where a Remote Working arrangement is being proposed the suitability of the remote-worker's line manager should also be considered, having regard to the need for skills in distance management.

(iii) Financial considerations;

- **Computers & other Additional Equipment**
  Under a Remote Working Arrangement an individual's employer may provide equipment, such as computers, printers, software etc. to enable him or her work from home. Where the provision of such items is primarily for business use, a benefit-in-kind (BIK) charge is not be imposed on the employee in respect of incidental private use.

- **Telephone & Broadband**
  The provision of a telephone line, broadband, etc. for business use will also not give rise to BIK.

- **Office Furniture**
  The provision of other equipment, such as office furniture, etc., by the employer to enable the

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[15]The UK Employment Appeals Tribunal case (Clarke & Powell v - EleyKinoch Ltd) firmly establishes the legal principle that the same selection criteria be applied to all workers, whether part time or full time. The Protection of Employees (Part Time Work) Act, 2001 is also relevant. See Equal Opportunities Commission website (*see Resources section*) to access UK cases.

[16]The employee is entitled to be paid for such training time. This has been established as a principle by the ECJ. *(See European Case Law in **Statutory Entitlements** section).*

employee work from home will not attract BIK where the equipment is provided primarily for business use.

- **Home Expenses**
  Remote Workers will incur certain expenditure in the performance of their duties from home, such as additional heating and electricity costs. At the date of producing this report, Revenue allows an employer to make payments up to €3.20 per day to employees without deducting PAYE, PRSI, or USC. This does not prevent an employee making a specific expense claim where the actual expenditure incurred is in excess of this amount.

(iv) Data Protection

Company/organisation security policies should be reviewed to see whether they are appropriate for remote workers and identify any variations required. The employer is responsible for taking the appropriate measures, notably with regard to software, to ensure the protection of data used and processed by the remote worker for professional purposes.

The employer should inform the Remote worker of all relevant legislation and company/organisation rules concerning data protection. This includes the Data Protection Acts, 1988 and 2003 and the European Communities (Electronic Communications Network and Services) (Data Protection and Privacy) Regulations, 2003.

It is the e-worker's responsibility to comply with these rules. Significant issues will include:

- how to deal with secure document waste
- locking of the home office/computer
- procedures for computer virus checking and password changes
- data backups (it is advisable to require that one set of data backups be held at the central site where possible in case of fire damage or other problems affecting the home office)
- confidentiality and non-disclosure agreements

As a general rule, the employer is responsible for providing, installing and maintaining the equipment necessary for regular Remote Working unless the Remote Worker uses his/her own equipment. If remote work is performed on a regular basis, the employer compensates or covers the costs directly caused by the work, in particular, those relating to communication.

The remote worker will be expected to take reasonable care of the equipment provided and does not knowingly collect or distribute illegal material on the internet. The employer provides the remote worker with an appropriate technical support facility for equipment and software problems.

The employer has the liability, in accordance with national legislation and collective agreements, regarding costs for loss and damage to the equipment and data used by the remote worker.

The employer should bring to the worker's attention any restrictions on the use of IT equipment or tools such as the Internet. The employer should ensure the e-worker is aware that any breaches of these rules or restrictions could lead to disciplinary action and appropriate sanctions.

(v) Training and Appraisal

Remote workers have the same access to training and career development opportunities as comparable workers at the employer's premises. The workload and performance standards of the remote worker are equivalent to those of comparable workers at the employer's premises. Arrangements should be made to monitor work performance. Performance appraisal procedures, where they exist, may need amendment in relation to the remote working arrangement. Training requirements should be assessed for the remote worker and where appropriate for his/ her office –based manager and his/her colleagues.

(vi) Legislative Considerations:

Provisions of the Health, Safety and Welfare at Work Act, 1989 apply to all employees, including home workers and those who work outside the conventional office. Under the provisions of the Act, both employers and employees have statutory obligations based on common law duties of care.

Employers have an obligation to ensure, insofar as is possible, the safety, health and welfare of their employees and, consequently, every place of work must have a safety statement. The need for such a guarantee extends to more innovative forms of working, such as remote working. Thus, in the case of remote working, it is suggested that specific health and safety advice should be given to employees and they should be asked to record what has been done. An initial risk assessment must be carried out although this can be done by the employee.

In order to verify that the applicable health and safety provisions are correctly applied, the employer, workers' representatives and/or relevant authorities should have access to the remote workplace, in line with national legislation and collective agreements. If the remote worker is working at home, such access is subject to prior notification and his/her agreement.

Once granted, any remote working arrangement should be stated in the relevant documentation that the arrangement is subject to on-going review by the Company, based on prevailing business conditions/needs and that you reserve the right to reverse the arrangement if business needs dictate that is necessary or where for example an individual granted remote working is required to be more office based.

From a practical perspective, the longer an employee has the arrangement, the harder it is to reverse it, but it is still possible once you have reserved the right to do so. In some instances, both parties may agree to a trial period in order to see how the proposed arrangements would work in practice before a final decision is made.

If the employer is unable to grant the proposed changes to working arrangements, this should be confirmed to the employee in writing. The policy should deal with minimum time periods within which the employee may re-apply for flexible working.

8. Qualitative Interviews with Organisations:

1. Company Name: Laya Healthcare
  Company Contact Person: Brid Seymour

Overview of Flexible and Remote Working Practices in the Organisation:

Laya Healthcare based in Little Island in Cork is the second largest provider of private health insurance in Ireland with over half a million members and over 450 employees. In 2015, it became a member of AIG one of the largest insurance organisations in the world, comprised of a variety of teams from finance to customer care. Driven by employee demand and traffic congestion issues around the Little Island area, Laya have put significant energies in to developing their flexible working policies over the last two years.

A wide range of legacy flexible working policies had been in place for a number of years previously in Laya but access had become very manager dependent and there was clear inequity of access and little management support. As such, two years ago, a concerted effort began to enhance flexible working within the organisation.

A team was chosen with a manager who was particularly supportive of flexible and remote working and who was effectively and successfully managing the remote and flexible working of almost 60% of her team. She was supported to become a prominent advocate of remote working within the organisation and championed the mutual benefits of remote working with other managers. As such she spoke at various events and management meetings about the application and mutual benefits of adopting flexible working. Additionally, managers were supported in one to one meetings with HR discussing their reservations. The result of these two efforts, an internal champion and HR manager support, has been a significant uptake in flexible and remote working in the organisation.

Partial and remote working is available within Laya with 13% of employees now working fully remotely. Remote working was primarily driven by demographic and locational challenges. Those working fully from home receive an ergonomic inspection of their workspace by an occupational health nurse and a variety of qualifying criteria need to be met. Team leader visits to the workspace are carried out at least twice a year.

Communication was deemed of paramount importance in the success of remote working, live streaming meetings etc. was identified as an area that still needed work and development. Employees are also asked to be in the office two days a month and are invited to come into the office for any corporate or social events. Interestingly it was noted that a large demand for flexibility was coming from millennials as well as care givers; in the case of millennials who are in many cases still living at home, remote working was not suitable given their living arrangements. Significant increases in productivity have been recorded in those working from home with the average increase being 15%. Laya now benchmark the productivity of their remote workers 15% higher than that of their office workers.

Laya has identified locational areas where a number of employees are working remotely and looked to develop working hubs suitable to cater for those employees who may which to avail of a co-working space with colleagues.

Key points of note and key learnings shared:

- Remote work positioned as a benefit not an entitlement.

- Conversation needs to be forced at **senior management** level in relation to reservations that may exist.

- Managers need to be supported on a one to one basis in managing their reservations.

- **'Care and feed'**. The process of remote working is not done once introduced, it requires continued monitoring and support in terms of uptake and supporting managers with lower uptake.

- **Trust** underpins the success of remote working.

- There needs to be a consistent drive towards supporting remote and flexible working, if you are not doing it as a manager then why not? What do you need to make it possible? If what the employee is looking for isn't possible what are the alternatives. Where can the happy medium be found where manager and employee are comfortable.

2. Company Name: Teamwork

Company Contact Person: Gavin O'Brien

Overview of Flexible Working Practices in the Organisation:

Teamwork are a software development company which create task management and team collaboration software. Its three main products relate to project-management, customer support, and real-time internal communications. Currently the organisation has 190 employees and are based in Mahon, Cork.

The company offer 'full flexibility' to employees around a 37.5 hour week. They do not have formal and standard core hours but employees' hours are determined by management, business demands and customer needs. Flexibility is managed within the parameters of each. Employees are given the option of working 'when they want, how they want and from where they want' within the average working week (37.5 hours) and within the parameters of their team. Teamwork have opted for guidelines for managers around flexible and remote working as opposed to formal flexible policies to ensure that the needs of the organisation, managers and employees can be best met.

Remote working is available to all Teamwork employees, as such employees are allowed to work from home in a planned manner. Working from home because you are feeling unwell for example is not allowed. If you are unwell you are unable to work.

As with the other forms of flexibility, once the reason for remote working is understood it is easier to implement successfully. Any patterns of flexibility are addressed to understand the reasons why. Where people are taking advantage of the system this is addressed as quickly as possible to understand the reason. Gavin noted that they have had very few cases of individuals taking advantage of the system but reiterates that the remote working has to meet the business need as much as it meets the individual needs.

Teamwork currently have 35 people working fully remotely across 18 countries and these people have the option of working from home or in a co-working space. The importance of good tools for remote working was cited as crucial e.g. shared calendars, team sharing software, good communication system.

Key points of note:

- 'Only a small number of employees will use formal flexibility in a real way on a regular basis' (ca. 10% but for this 10% it could be life-changing in terms of access and work life balance). It allows the organisation access to a pool of employees that they would not otherwise be able to access. For the remainder, remote and flexible working provide stop gaps at times when required. The importance of making remote working 'work' is understanding 'the why'. Once the organisation understands why the remote work is required it can go about meeting this need and the mistrust and doubt that often breed in remote working situations is dissipated.

- Teamwork believe the key to work flexibility being successful is the individualisation of access. **Understanding why someone needs or wants remote working** and meeting that need in a flexible way rather than introducing a policy for everyone, that is open to abuse just because it exists.

- Patterns of behaviour in terms of flexibility are noted e.g. consistent patterns are questioned in an aim to understand the why and ensure that company is meeting employee needs and also that the employee is meeting organisation's needs. Full disclosure and openness around reasons behind remote working are really important in building trust. **Data can be utilised** to indicate when conversations are needed.

- Gavin talked about the role of HR in **supporting managers to have hard conversations** where required and to have these promptly. If things are not discussed or understood they can breed mistrust.

- Often for managers there can be panic around how they will manage a huge increase in flexible and remote working however teamwork contends that most people will revert to the norm, that we are creatures of habit therefore we are unlikely to drastically change our working practices unless there is a reason and then the job of the manager is to find out why.

- Having good **communication** tools that allow people to work easily with each other from remote locations is important in making remote working a success e.g. tools that allow you to see that someone is online, IM and have team meetings regardless of location.

3. Company Name: Semi State body (Wanted to remain anonymous)

This is a semi state body which has undergone significant changes and restructuring in the last number of years. At present, they have 1700 employees and are based in Cork and Dublin. With a view to enhancing flexible working practices within the organisation, an 'Agile Working' pilot was conducted last year with 100 employees. The pilot enabled a cross section of 100 employees to work flexibly for a period of 4 months. Employees on the pilot were offered a choice of 3 options:

- Working from home 1 day a week,
- Working from an alternative regional base one day a week or
- Flexibly working around core hours of 10-4 within the hours 7am-10pm

Feedback from managers and employees on the pilot was resoundingly good with 91% reporting reduced stress and 98% reporting increased productivity. From the pilot an online training programme was developed for managers and employees (two programmes) looking at ergonomics, how to book spaces in regional offices and how to access their library of equipment e.g. laptops etc. for working remotely. It also includes policy guidelines, data protection guidelines and SAQs (Self Assessment Questionnaires). It is mandatory for any employees or managers using flexible or remote working to have first completed the training.

Flexible and partial remote working was fully rolled out as per the pilot in November last year with 1200 employees to date having completed the online training. The success of the pilot was cited as being pivotal in the larger role out of flexible working, with much buy in of managers and employees gained through the conversation and data released following the study.

In terms of challenges encountered, manager trust was cited as number one. The specifics of each employee's remote working arrangement are dealt with at a manager level. As such some managers have been more supportive than others. Ensuring full support seen as being pivotal going forward in order to ensure equality of access. As such HR still identified a body of work needed to support managers with the process.

Overall the roll out was seen as a significant success with a 10% increase in engagement noted since the roll out last year. It was noted that it is still early days, but initial indicators seem positive in terms of how the remote and flexible policies, training and implementation are working in practice.

Key points of note:

   • **Manager Trust** identified as being pivotal to the success and identified as an ongoing challenge for HR in encouraging and changing mindsets around remote working.

The pilot program was identified as being a successful means of introducing and assessing the feasibility of flexible and remote options for the organisation.

4. Company: Shopify

Company Contact: Allyson O'Regan, Talent Acquisition

Shopify is a leading commerce platform designed for small and medium-sized businesses worldwide. With almost half of their workforce remote, they structure their support teams as intentionally remote in order to allow access to a diverse talent pool, without relocating. Currently Shopify have over 300 employees across 26 counties.

Allyson has been working remotely with Shopify for over 2 years and has moved from an initial position as customer support agent to team lead and on to her current role in recruitment for Shopify. She has moved from temporally fixed roles to temporally flexible roles within her remote working time with the organisation.

Shopify have a culture of remote first so all employees across the organisation adopt policies, procedures and tools that work remotely. Shopify's motivation for remote working is driven by access to diverse talent pools and the need to meet demands across a range of international markets with sellers and customers located internationally. Allyson spoke specifically of their recruitment to remote roles and how Shopify manages this through initial 'life story interviews' followed by 'the gauntlet' a simulation style exercise. Success rates at each stage are on average 40%. Empathy, self-awareness, self-leadership and strong communication skills are identified as core competencies in successful remote workers.

She spoke about the initial set up of remote workers and their access to ergonomics consultants, wellbeing advisors and well as an engagement officer. Employees are given an initial stipend for setting up their office and are provided with all the necessary technology they will require to do their jobs.

In terms of challenges identified with Remote Working; **Poor hiring or poor fit with Remote Working** was cited, as was **social Isolation.**

Additionally, working with colleagues or managing a team having never met them in person was cited as challenging. She talked to her experience of this and the challenge in really understanding a persons' motivations and character until you had met them face-to-face. **Some of the key points arising from this conversation include:**

- **The role of trust** and the importance of an expectancy towards trust i.e. trust until proven wrong. Each employee is given a 'full trust battery' on completing their training and initiating work and it is up to them with their managers to maintain this level of trust.

- Meetings are very important, as are **clear goals and regular check-ins**. Shopify have an expectancy of employees to be 'camera ready' and an expectation to use face to face technology when possible.

- The engagement officer is key in **championing engagement** in the organisation and keeping it on agenda.

- **Self-awareness and empathy are imperative in remote communication**. One bad feeling can make an employee feel even more distant and amplify into larger problems.

- Shopify ensures that **regular in-person face time** is scheduled with teams meeting once or twice yearly in a specific location. Pop-up offices are run once a month in areas where there are clusters of employees to allow for networking and social engagement.

- **Mandatory trial periods** are very important, during which emphasis is put of feedback and skill development.

5. Company: HIQA

Company Contact: Carol Grogan, Inspector Manager and part of team tasked with re-introducing remote working to inspectors within HIQA (Health Information and Quality Authority).

Driven by talent shortages and demands on office space, HIQA recently re-engaged with remote working for their national division of inspectors, having previously had remote work in the organisation and having seen it retracted for a variety of organisational issues. A task force was set up in recent years to reintroduce remote working in the 'inspectorate' area of the organisation. All remote workers within HIQA are recruited and attached to a base office and are required by contract to be in the office 24 days a year allowing training and necessary site meetings to be scheduled.

Carol shared her experience of what had not worked originally, what was done to ensure success in the second offering, and also her own personal experience as a remote worker and a remote worker manager.

Challenges identified and learnings taken from the previous iteration of remote work included, lack of support and felt isolation of employees, lack of consideration given to the change required in management style, and lack of consideration to peoples' connectivity.

When introducing Remote work in the past no consideration was given to the location of inspectors' caseloads with many travelling significant distances incurring substantial subsistence costs.

Carol spoke of some key tools and procedures which have been adopted and are contributing significantly to the success of remote working, these include;

-Jabber- employees are expected to meet with their managers every 10 days for supervision. Carol cited supervision as being a core component of making remote work 'work' in making employees feel they were not forgotten and in building trust with managers.

-Remote work was put as a standing item on all management and leadership meetings for the initial 6-8 months so issues arising could be discussed, shared and resolutions collectively found.

-Remote working and how it was working was also made a standard item on all remote workers- manager meetings for the initial period so space was created for problems to be explicitly discussed.

-**Data and performance management tools** were harnessed to measure performance and note any discrepancies. Significant importance was placed on managers trusting the data and the transition phase.

-Significant work was invested in updating and sharing regulatory handbooks and policies. Training videos and 'how to use' videos in relation to various tools were created as well as a range of reference guides. These resources were available to the entire organisation meaning that overall access to and quality of information was increased.

-Home office **working environments are assessed** by both facilities (usually through self-assessment checklists and by IT who do an inspection of the homes connectivity)

-16 weeks of **induction** takes place varying from corporate induction to classroom-based training to mentorship and team induction. This period involves significant office time where relationships are developed.

Additional notes:

- Should flexible or remote work not work for individuals they have the option of reverting to working from a locationally convenient base office.

- As with others we spoke to, remote working was considered and **presented as a privilege not an automatic right.**

- Criteria exist to be eligible for remote working. At present only certain roles and only up to certain levels are eligible for remote working. Remote workers need to be no more than 40km from a base office and at least 50% of the team must be office based.

Input from conversations with other organisations and HR professionals who have overseen adoption of Remote Working:

Conversation with Senior HR Manager in a semi-state educational institution supporting flexibility within her organisation (Company preferred to stay anonymous)**.**

Noted that one of the issues that presented in their case was in retracting remote working arrangements once precedent had been set, with the shift of power seeming to be much more in the employees' court in this organisation. As with other interviews the importance of the arrangements being presented as a benefit not an entitlement was quite apparent. Equally, the need for regular communication, clear boundaries and a regular review of the suitability of the arrangement. As with the others she noted, 'it won't work if it doesn't work for the business as well as it works for the individual'.

Also, as with all the organisations the **role of trust** was identified as pivotal. This organisation has over 2,500 staff spread across a range of departments. The management of formal flexible policies was identified as being extremely challenging as such organisational flexibility is largely informal and overseen at management level with line managers very much identified as gatekeepers of remote working within the organisation and HR in a support, problem solving and conflict management position.

Key Learnings: The importance of regular reviews was highlighted and the understanding that as a benefit Remote Working can be taken away, just as it can be given. **'Remote Work Arrangements won't work if they don't work for the business as well as they work for the individual'.**

Note: From this conversation it was clear that this was a low trust organisation and as such, the success of flexible working was very much undermined by a lack of trust.

Conversation with Senior Manager in a global IT solutions organisation, managing flexibility within her team (Company preferred to stay anonymous)

The main learnings in this case were around the **impact of culture** on remote working and the role of management and those at senior levels in supporting remote working and creating a culture of flexibility. Buy in from management was mentioned as being key in the success of a flexible culture. As with other organisations, **management was very much the gatekeeper of remote working** in this organisation with **personality differences and trust identified as being worthy of consideration**. Interestingly, this organisation had few formal flexibility policies in place but was deemed 'extremely flexible' due to its culture. Work-life balance was important, and many employees cited the company's flexibility as being the primary reason they had stayed with the company for so long.

Key Learnings: Buy-in of senior management and the **role of culture**. The knock-on effect on retention and engagement.

Note: by comparison to the previous conversation this was a very high trust organisation with a culture of flexibility and trust bred by senior management.

Conversation with Senior HR Manager large Pharmaceutical Company (Stryker)

This company was regarded by the interviewee as highly flexible despite also having little in the way of formal flexibility policies. At present, in terms of formal policies, they have a core 11-3 day in operation outside of which there is significant flex and significant informal remote working. Trust is a key element of this company's philosophy with the CEO's mantra being **'trust until someone proves you can't trust them and then manage the performance issue specifically'.**

As a global organisation this HR manager noted significant cultural differences in approaches to flexibility and remote working between European and US branches of the organisation with Europeans recording similar levels of productivity but far greater work life balance.

No performance issues were noted with relation to remote working with many individuals working remotely on a weekly basis. It was noted that any individuals with which there were performance issues would have presented with issues regardless of remote working. As with other companies that we spoke to, remote working was very much managed at a direct line manager level across the organisation. With managers subject to the same flexibility as their direct reports. With two sites in Ireland, and one more established than the other, it was noted that in the older site it took longer to shift the mindset towards flexibility and remote working and to support managers in making flexibility work.

Key Learning: This HR manager noted two significant and key benefits of remote working; productivity increases and retention.

Note: Interestingly, she noted that remote working that works for both the organisation and employees will be made to work by employees. Employees will do everything to ensure its success and support its roll out as it is not in their interest not to abuse it as it can be taken away. Therefore, she noted that employees go above and beyond to ensure its success (increased productivity).

Conversation with Senior HR Manager/Consultant large Pharmaceutical Company (MSD)

Having managed and worked as part of flexible and fully remote teams for almost the past decade, this HR manager had significant insight into what works at present and what would make it work better in the case of formal remote work policies.

The **role of team contracting** was highlighted, as was the need for clear **communication** around what is being rolled out in terms of remote working and why. What the **expectations** are; employer, employee and internal customer expectations. **How performance will be measured and reviewed** and eligibility for remote working is also key to success. It is also important to clearly state when and why remote working is not accessible e.g. Core hours, core office days, core periods of time etc.

The importance of **tools** was stressed, including; shared calendars, voicemails, chat functions, access to help desks and protocols around support, broadband & remote access to systems. It is **important to have a visible online presence** for team members working from different spaces as is managers cultivating that sense of presence for a team virtually.

The manager discussed how, on reflection, a decision-making framework (much like a redundancy model framework), would be a useful tool for a manager to have in deciding whether or not to grant remote working. This standardises the process and should remove bias, while also allowing the employee to see where they need to develop in order to gain access to remote working.

She discussed the importance of each team doing some work on **critical mass requirements** i.e. how many people they need at any one time to be in the office. This should be recorded and reviewed biannually.

This manager identified the importance of encouraging employees to **acknowledge the benefits of remote working**, because, as it becomes normalised, some of the effects on satisfaction, productivity etc. can be lost. Therefore, creating a means by which employees can remind themselves of its benefits regularly can mitigate this lapse e.g. built into performance reviews, employee forums etc.

10. Key Themes:

Remote must work for the business as well as it works for the individual

Multiple stakeholders are involved in the remote work arrangement and the expectations and responsibilities of all stakeholders must be met in the arrangement. Most individuals do not operate in silos within organisations and those working as part of a team need to consider the effect of remote work arrangements on their team members.

Team expectations need to be clearly shared and tools provided to enable virtual and remote teamwork. Employees should also be asked to consider the implications for their team of remote working as part of the application process for increased locational flexibility. Clear stakeholder analysis is required by remote workers to understand expectations, requirements and needs. Equally both organisations and managers need to be explicit in their communication of expectations and responsibilities and how these will be tracked and measured.

Managers must be on board and supported

Research has shown that a key piece in the flexibility conundrum is line managers. Most companies leave to them the approval of flexible and remote working arrangements and they are the ones that can "make or break" the policy[1]. Managers are hesitant to encourage the use of remote working and they worry about the consequences and implications the locational flexibility would have on their work.

Managers are often hesitant to promote remote working policies because they worry that everyone will want to adopt them and that their work will be negatively impacted[18]. Research looking at managers of employees actively using flexible schedules shows that they noted only improvements; 75% of them reported no change in their workload, and almost all reported positive impact on their group

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[1] Lewis, 2003; Thompson, Beauvais, & Lyness, 1999 [18] Eaton, 2003

productivity[2]. Through all our interviews managers were recognised as one of the key groups who must buy in to changes in work arrangements[20].

Conversations with organisations consistently reinforced this point. Getting managers on board from the beginning by allowing them space to air their concerns was cited as important (Laya). Encouraging managers to have conversations promoting remote working formally or informally was also seen as important in building a culture of flexibility e.g. 'one simple thing' (Teamwork). Using metrics to track productivity across teams can provide insight in to where blockages may be occurring, the role of HR then is to understand why and to encourage managers less comfortable with remote working (Stryker).

Culture must be considered

Organisational culture needs to be addressed and understood in terms of its barriers and supports for remote working. Understanding where the drive for remote work is coming from i.e. business driven or employee driven, can also provide insight into potential barriers or supports. As such, clear communication in relation to the drivers need to be understood.

Trust is key

Remote working schemes are fundamentally based on trust and this is a key tenet in the whole area of flexible working. As such, it appears to be significantly important that trust exists between the remote worker and their direct manager (and indeed between the manager and senior management).

In each interview we carried out trust was mentioned numerous times. The success of remote working in high trust organisations (Stryker/Shopify/HIQA) and the struggle around flexibility in low trust organisations (Higher Education Organisation). If trust can be built and cared for, the knock-on positive effects of trust for working relationships outside of just remote working is tangible.

Training, tools and targets all important

The provision of adequate tools and training to enable people to conduct the job seems essential in effective adaptation of remote working and can ensure that both parties are agreed on what the job entails, and the output required. Significant research has identified the importance of training particularly line managers in how to manage a transition to remote working arrangements. Where the emphasis is shifting from line of sight management to task-based management often a mind shift in management approach needs to be supported by requisite training and development.

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[2] Boston College Center for Work and Family, 2000 [20] Powell, 1996

Communication must be developed and intentional

Communication skills and tools were also regularly cited in interviews and research as being pivotal to the success of Remote Working. Strong communication skills and the development of enhanced awareness around communication among remote workers was mentioned as areas for development in some organisations (Laya/HIQA).

Tools to enable seamless communication regardless of location will be essential in ensuring the success of remote working, an audit of existing tools should be carried out to assess the degree to which they are fit for purpose in the case of enhanced flexible working.

Use performance data effectively

Monitoring the effectiveness of working from home is easier when there is trust between both parties and the training and tools are provided which result in the achievement of targets within an agreed timescale. Clear targets and good performance data to feedback and monitor these targets support good and transparent working relationships.

Again, throughout our discussions with organisations, it was clear that flexible working is only effective if it is meeting the business need i.e. targets and timescales are being met. Clear communication of these targets is important and also clear and communicated monitoring of these targets. Where work can be completed effectively, in fact some would say more productively in many cases (Laya/HIQA) through remote working then this should be measured and monitored. Remote Working should not alter an employee's ability to meet targets, if it does then on these grounds it should be revoked. However, this can only happen if there are clear performance indicators that are agreed and communicated by managers.

Remote Working is not for everyone and Self-Awareness and openness to development are key

Consistently reiterated across the interviews was also the theme of self-awareness, communication and personality. Where employees are attracted to a role for its 'remote' status alone it is unlikely to be successful (Shopify). Remote workers need to understand the role but equally they need to understand themselves, how they communicate, how they ask for help and how they manage themselves when working alone.

11. Training Programmes

1. Proposed Training Program Content: Remote Workers

Length: 1 Day

Suitable for: New and existing remote workers across sectors.

Program Content:

- **Introduction to remote work**: Types, Prevalence, Benefits and Challenges.
- **Communication and collaboration in Remote Work:** Emphasis on role of communication, Focus on tips for communication remotely, stakeholder identification and management, differences between communication and collaboration.
- **Personality and Remote Working:** Type theory and impact on communication, wellbeing, feedback etc. for Remote Working, self-reflection and strategy identification to deal with potential challenges.
- **Self-leadership and emotional intelligence in Remote Working:** Building self-awareness and practical strategies to use in Remote Working.
- **Trust:** Role of trust, iterative nature of trust and how trust can be intentionally fostered in Remote Working Relationships, expectations and responsibilities in remote working relationships.
- **Tools:** Types of tools used in Remote Working and how these can be harnessed effectively, including self-assessment of tools used, effectiveness and potential gaps.
- **Well-being:** Exploring boundary theory, time management, work environment and social needs and supports.

2. Proposed Training Program Content: Managers of Remote Workers

Length: 1.5-2 Days

Suitable for: Managers working with new and existing remote working team members.

Program Content:

- **Intro to remote work**: Types, prevalence, benefits and challenges.
- **Culture and Remote Work**: Reflecting on organisation culture, role of culture in change, communication etc., cultural web and assessing organisation culture in relation to remote working.
- **Communication and collaboration in managing remotely:** Emphasis on role of communication, focus on tips for communication with remote workers, differences between communication and collaboration, knowledge management and circulation, influencing from a distance, creating channels for informal communication, creating communication norms.
- **Personality and managing remotely:** Type theory and impact on communication, management style, feedback, conflict management etc. for managing remotely, self-reflection and strategy identification to deal with potential challenges.
- **Emotional intelligence and leadership in managing remotely:** Building self-awareness, key areas of emotional intelligence in leadership and in managing remotely, personality under pressure and implications on leadership 'Dark Side of Personality', impact of poor communication and stress transference in managing remotely.
- **Psychological safety in teams:** Team formation and agility, team dynamics, Belbin team roles, assessing team psychological safety, reflecting on psychological safety and its role in remote working.
- **Trust:** Role of trust, Iterative nature of trust, barriers and accelerators in building trust, expectations and responsibilities in remote working relationships, Lencioni 5 Dysfunctions, team/ relationship assessment and reflection on strategies for development.
- **Tools:** Types of tools used in Remote Working and how these can be harnessed effectively, synchronous v asynchronous tools, including assessment of tools used, effectiveness and potential gaps.
- **Performance management:** Setting and communicating expectations, feedback to sustain performance, understanding and managing bias in managing remotely, managing difficult conversations remotely.
- **Well-being:** Exploring boundary theory and other research in relation to well-being and remote working, increasing awareness in relation to potential needs and supports required by remote workers and developing intentionality in ensuring well being kept on the agenda, case studies and discussion.

3. Proposed Training Program Content: HR and L&D Managers

Length: 1.5-2 Days

Suitable for: HR and L&D managers tasked with supporting Remote Working within their organisations.

Program Content:

- **Intro to remote work**: Types, prevalence, Benefits and Challenges.
- **Culture and Remote Work**: Reflecting on organisation culture, cultural web and assessing organisation culture in relation to remote working, identifying supports and barriers within the organisation and creating targeted action to address.
- **Remote Working through the HR Lifecycle:**

  (i) Hiring Remote: considerations and competencies.

  (ii) Onboarding Remote Workers: considerations, socialisation, policies and considerations.

  (iii)   Development and Performance Management: considerations, reflections on changes required, exploring biases and creating equal opportunities for training and career progression.

- **Communication and Collaboration in Managing Remotely:** Emphasis on role of communication in remote work, differences between communication and collaboration, knowledge management and circulation, creating channels for informal communication.
- **Personality and Managing Remotely:** Overview of type theory and impact on communication, management style, feedback, conflict management etc. of remote workers and management styles.
- **Emotional Intelligence and Leadership in Managing Remotely:** Overview of role of emotional intelligence in remote working and remote leadership, overview of personality under pressure and implications on leadership 'Dark Side of Personality', Impact of poor communication and stress transference in managing remotely.
- **Psychological Safety in Teams:** Tuckman's stages of team development, team dynamics, Belbin team roles, assessing team psychological safety, reflecting on psychological safety and its role in remote working, discussion on how managers can be supported in developing psychological safety in teams.
- **Trust:** Role of trust, barriers and accelerators in building trust, expectations and responsibilities in remote working relationships, Lencioni 5 Dysfunctions, team/relationship assessment and reflection on strategies for development.
- **Tools:** Types of tools used in Remote Working and how these can be harnessed effectively, Synchronous v Asynchronous tools, including assessment of tools used, effectiveness and potential gaps.
- **Well-being:** Exploring boundary theory and other research in relation to well-being and remote working, increasing awareness in relation to potential needs and supports required by remote

workers and developing intentionality in ensuring well being kept on the agenda, case studies and discussion.

All programs are supported by a range of resources including reading lists, assessments, tools and recommended online resources.

Programs will be evaluated using a pre and post training survey the results of which will inform future iterations of the program.

Vitae Consulting Profile

Vitae Consulting was established in May 2003 to provide Business Psychology solutions to its clients. The Vitae ethos is to create honesty and trust with clients and in turn create an environment where development is supported. Vitae's expertise in the area of organisational development, psychometrics and facilitation has been recognised by its customers both nationally and internationally. Clients include Multinationals, SMEs, Public and Non-profit Organisations and Third Level Educational Providers. Key to our success is our ability to listen to needs of the client and tailor solutions to meet those requirements, bringing the scientific rigour, area expertise and integrity to all our work.