Essential Processes *for* *Remote Work*

Flowingly

Remote work is a hot topic right now. Due to COVID-19 prevention measures, many companies that have never had to consider remote work before, are suddenly finding themselves in a situation where 100% of their workforce is remote.

For many businesses, this raises a lot of questions. Can they sustain a remote culture? Do they have the right tools in place to support it? Are their processes and workflows strong enough to run remotely?

This last question is an interesting one. A sudden change of your business model will forcibly expose the strengths and weaknesses in your processes.

In the past, we have published a number of process templates covering off all types of business processes, from HR to Finance, Operations to Sales.

This guide is a bit different. These templates are designed to ensure you are ready to have a remote workforce. Think of them as the basic building blocks for constructing a strong remote culture.

If you like what you see, contact us. We'd love to set you up with a free trial of Flowingly, complete with the processes in this guide!
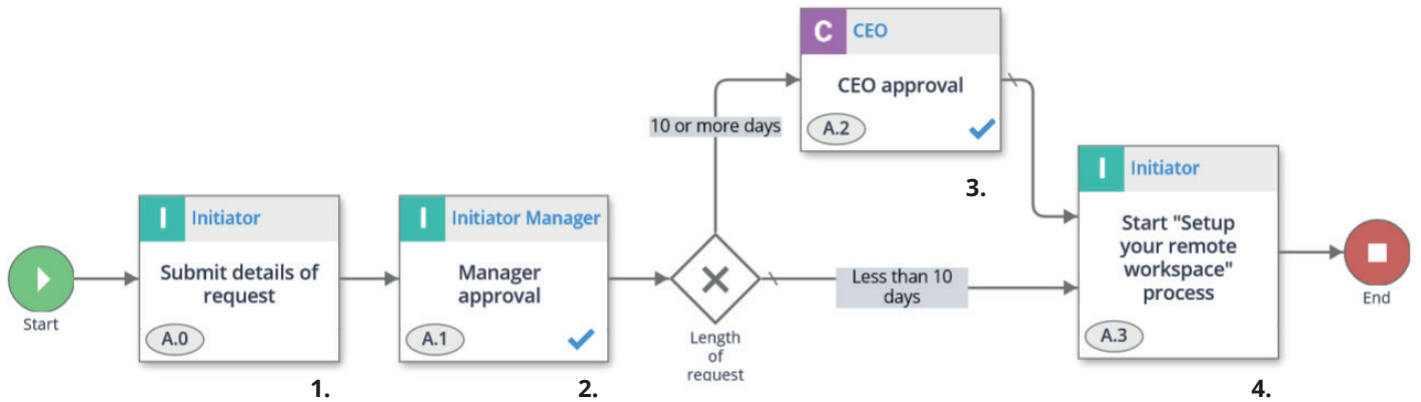

Thanks,

Jon Kalaugher
Founder & CEO

Jon K

Flowingly

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Remote Work Process **Request to Work Remotely**

Before staff start working remotely, most organizations will need to approve it. This process has two main benefits. Firstly, the organization can ensure that managerial approval is in place, and secondly, they get a full record of all remote staff for HR and health & safety purposes. This is a simple approval process, that can be modified to suit many other applications.

1. Submit details of request (A.0) — Initiator
2. Manager approval (A.1) — Initiator Manager
3. CEO approval (A.2) — CEO — 10 or more days
Length of request — Less than 10 days
4. Start "Setup your remote workspace" process (A.3) — Initiator

1

Submit Details of Request *Initiator*

The trigger for starting this process is an employee request to work remotely. This step is a good opportunity to capture all the relevant details about the request, from the dates requested to their job title (you may have a list of titles which are approved for remote work).

It's important at this step to capture the reason for the request, along with an outline of the working location, including the address, details about the environment and whether the staff member requires any equipment that they don't already have.

Submit details of request
Waiting for input by You for A Few Seconds

Due In A Day
21 Mar 2020

Submit details of request

Details of request

Please fill out the required details of your request below.

Job Title

First day of remote work
DD/MM/YYYY

Last day of remote work (leave blank if unsure) (optional)
DD/MM/YYYY

Number of business days requested (if unsure, enter 10)

Reason for request

2 Manager Approval *Initiator Manager*

This is a simple approval but provides an opportunity for longer requests to be approved by the employee's manager before they get submitted for approval to higher levels (e.g. the CEO). If the manager feels anything is missing from the application, it's good to have an option to just send back to the previous step and let the employee know what is missing.

3 CEO Approval *CEO*

Depending on the size and structure of your company, you will have different rules around approvals. Many companies will allow an employee's direct manager to make the call on shorter requests for remote work, while longer requests need to go through higher level of approval (as seen here).


4 Start "Set up your remote workspace" Process *Initiator*

Once the request has been approved, it's important to make sure the employee has a quality remote workspace setup that meets company regulations for health & safety. For this reason, the last step of the approval process should link directly to the "Set up your remote workspace" process.
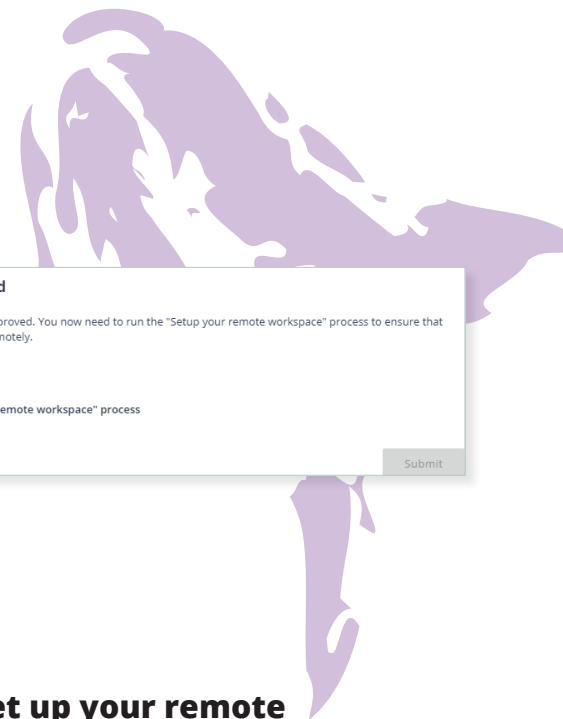
# *Remote Work Process* **Set Up Your Remote Workspace**

Whether your employees are in the office or working remotely, it's important that their workspace inspires quality work and is safe for them to work at for an extended period. In the office, employers take an active interest in the working environment. Remotely, it's important to provide employees with opportunity and resources to allow them access to a safe, inspiring workspace wherever they are.
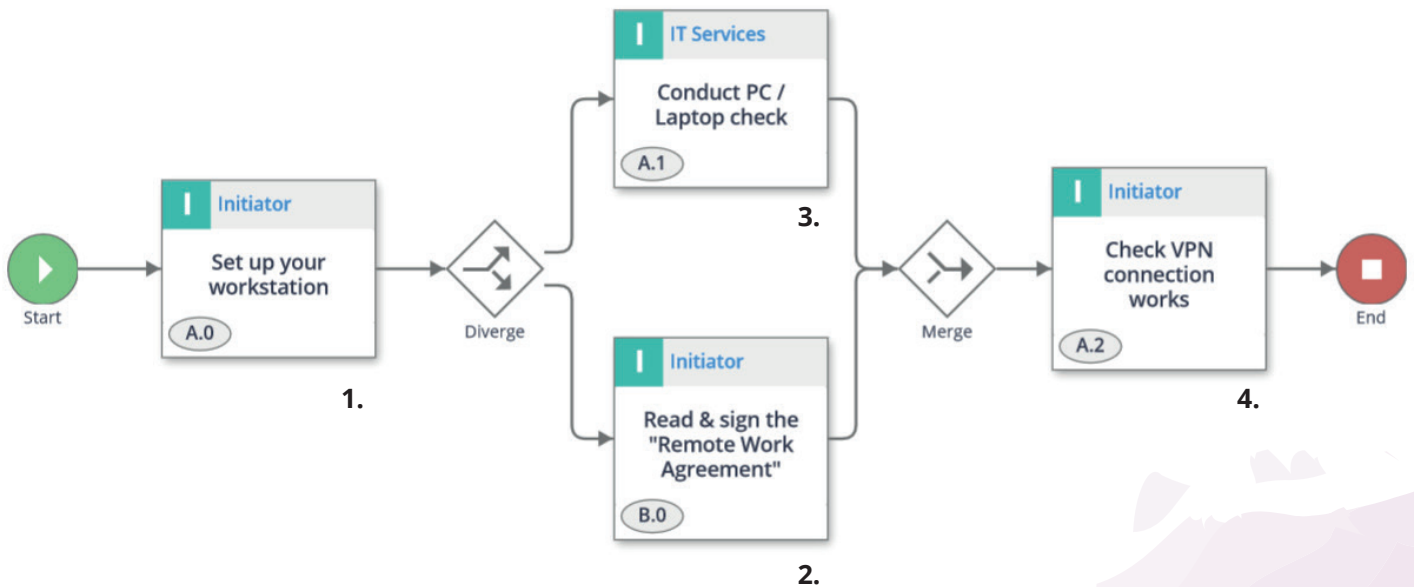
1 **Set Up Your Workstation** *Initiator*

First off, your remote employee needs a workstation that meets your company health & safety guidelines. The first step for employee initiating the process should be the setup of their workstation in compliance of recommended ergonomics. This is a good opportunity to insert instructions or a video outlining the correct set up, along with inspiration on how to optimize their workspace.
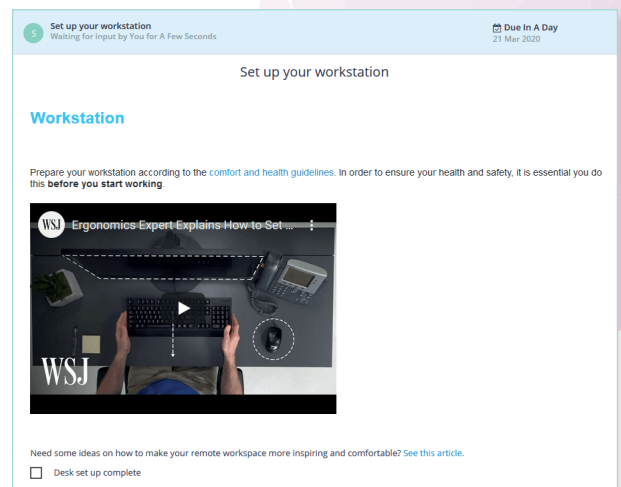
2 Read & Sign the "Remote Work Agreement" *Initiator*

It is important to have a Remote Work Agreement for your organization. This is an opportunity to outline the expectations of both the employee and the employer. It's also a good idea to cover off escalation procedures, communication requirements and other essentials. If you're using a workflow application such as Flowingly, the employee can download the agreement and sign it from here.

3 Conduct PC / Laptop Check *IT Services*

With remote workers, it's more important than ever to make sure that they have quality equipment and adequate security measures in place. At a basic level, your IT team will want to check that the device they are using is sufficient to run the required applications. IT may also need to make sure that sufficient security software is installed and that 2-factor authentication is being used. Finally, they will need to ensure that you have easy access to your systems and files, be that through VPN or other means.



4 Check VPN Connection Works *Initiator*

We've all been there. All ready to start working and... there's no connection. The last thing your employee will need to do is make sure that the connection that was set up is working seamlessly. Congratulations, now they are all ready to start working remote!

Remote Work Process **Request Access to Applications**

Many companies run this process informally. It usually involves email. Something along the lines of: "Hey Sam, do you know who the admin for Intercom is? I really need access." The thing is, that approach isn't too bad when you have 10 employees in the same office. But what about when you have 100 employees? And then they start working remotely? As soon as your business progresses past being able to swivel your chair to talk to the admin of the application, you need to develop a proper request process.

1.   **2.**   **3.**
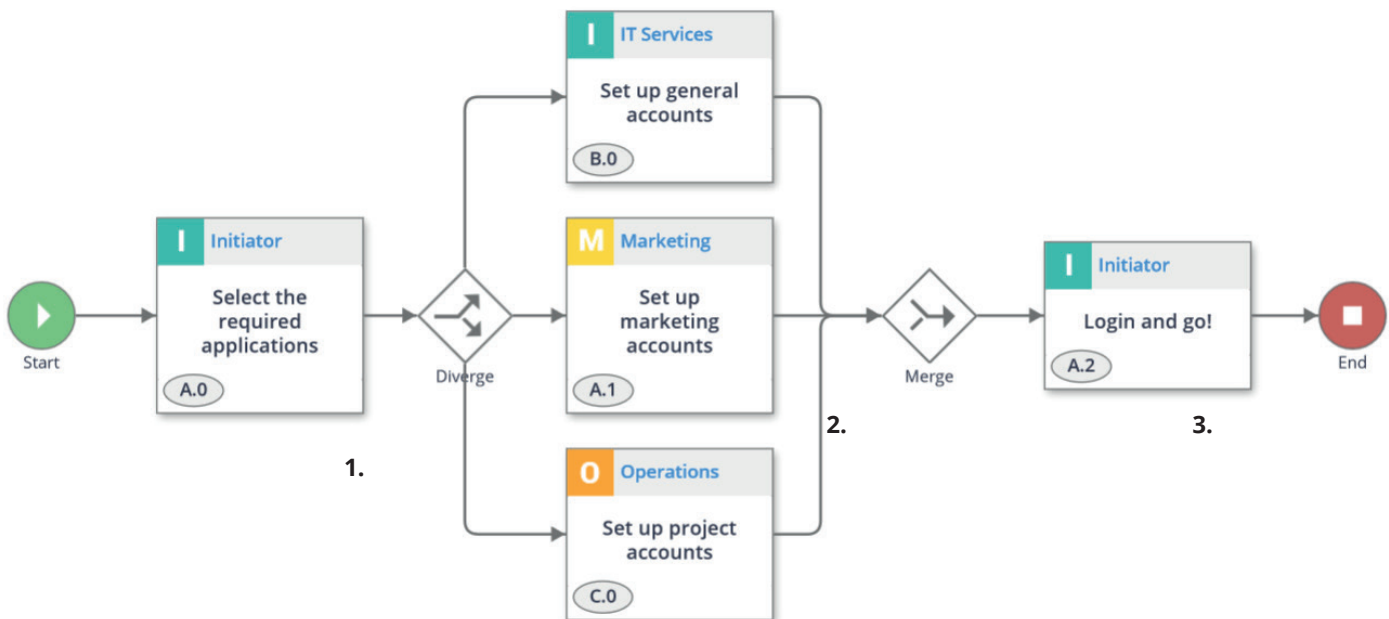
1

Select the Required Applications
Initiator

It's common for remote employees to suddenly find that they no longer have access to something they regularly used in the office. Luckily, in the age of cloud-based applications, accessing software from anywhere is easier than ever. The first step of this process is for the employee to highlight what they need access too.

Bonus tip: This step also works really well when onboarding a new employee, you'd just have it as a step for their manager.

Set up general accounts

Set up general accounts

Please set up the accounts requested in the previous step. Check them off on the list below once completed.

General accounts

- [ ] Office 365 (web)
- [ ] Office 365 (full)
- [ ] Slack
- [ ] Intercom
- [ ] Salesforce
- [ ] Teampass
- [ ] N/A

Print   Cancel   Reassign   Comments   Save   Submit

2

Set Up XYZ Accounts *Various*

When companies run this process informally using email, things get missed. By having a full list of services in a single place, life is made far more simple for the employee and the IT team supporting them. The great thing about using workflow software to process these requests is that it directs the request down the right channel instantly. No more *"Hey Sam, do you know who the admin for Slack is?"*.

3

Login and go! *Initiator*

The final step of this simple process is for the employee to check that your logins all work. Have them mark off that they're all logged in and ready to go.

Login and go!

Login and go!

You should have received all your required login details, and are ready to go. Once you've logged in to make sure your access works, check the box below.

Logged in and ready to go!

✓

Print   Cancel   Reassign   Comments   Save   Submit

We hope that we've got your minding turning over all the possibilities for improvement in your own business processes. You may have found that these processes are readily applicable to your own organization. Or they may give you some ideas on building your own processes from scratch.

If you would like to start on your process improvement journey, get in touch with us today.

Flowingly is a beautifully simple process mapping and workflow automation platform. Trusted by 100,000+ users at innovative companies around the globe.

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