



Standardized Policies and Procedures:

A Remote Work Realignment

ADAPT OR FAIL

The next decade will usher in a new paradigm, created in no small part by the COVID pandemic and a shift to remote work as the new normal. Creation of remote work operational guidelines with which both employees and management are comfortable is not a luxury but an imperative for continued success.

The pandemic changed everything overnight.

Midland A&E is a small business and is reliant—as most are—on performance. The architectural and engineering firm has operated out of an office for nearly two decades. The requirements of each project were such that a high degree of interactivity between all employees was required. There was close physical contact onsite and in the office.

An employee handbook for a remote staff was the first step in this transition.

There was no onsite work due to state and local restrictions. But a new, remote work framework had to be created because the Company would lose enough business to endanger the Company's survival if they did not work remotely. Because of the nature of the business, all employees could work remotely and all agreed.

What Does *Done* Look Like?

For each project--individual or team project--employees began to define specifically what must be in place for the team to declare it *done*. This defined the level of completeness and quality that measured a successful project.

LEAN REMOTE WORK APPROACH

The process for developing a remote work procedures and policies employee handbook began with a clear understanding of the Company's current state. **SMART goals** were then created using the Lean remote work methodology--Build-Measure-Learn. Key performance indicators were developed to measure and monitor successful, *done* projects. Once implemented, the outcome of each project was evaluated for continuous improvement. The result was best practices guidance that would evolve as the needs of the Company and the staff did. Company culture considerations such as employee wellness and engagement also were made a part of this document.

STRUCTURAL POLICIES

Questions

- What type and/or percentage of work can be done remotely?
- What are the required hours, if any, that the staff needs to be online?
- How is shared information handled and accessed--e.g., client documents?

Outcomes

- **Business process analysis** of all functions was done to establish type/percentage of work that could be done remotely
- Online time requirements were established for each individual, including virtual time with clients
- Developed a secure online repository for work documents with clear access permissions for staff.

STANDARD OPERATING PROCEDURES (SOPs)

Questions

- What **standard operating procedures** existed and which needed to be developed?
- How could the procedures be written or revised so that they were understood by everyone and could be attainable by everyone?

Outcomes

- Lean standard operating procedures were written with the intent that they would evolve over time as the need of the business and its employees changed
- The standard operating procedures enabled employees to successfully complete their projects, productively, while working in a remote work environment.

PRODUCTIVITY AND PERFORMANCE

(Answered by both employees and management)

Questions

- How do employees rate overall engagement and job satisfaction?
- What tools does each need to perform their job?
- What is the current productivity and performance baseline for each function?
- What are the **SMART** goals for a project team?
- What are the **SMART** goals for each individual?
- What are the remote key performance indicators for each project team?
- What are the **remote key performance indicators** for each individual?
- How much face-to-face time with client, if any, is required for a successful project?
- How much time in the field, if any, is required for a successful project?

Outcomes

- Employee feedback on their jobs was used to build **SMART** goals, KPIs and each individual's employee handbook portal
- While most employees had their own tools such as engineering programs, free access to such tools was given through their online portals
- **SMART** goals and KPIs for each individual were created and shared through their portal
- **SMART** goals and KPIs for each project team were created and shared through project portals
- For the duration of COVID restrictions, a limit was placed on the amount of time to be spent in the field and with clients.

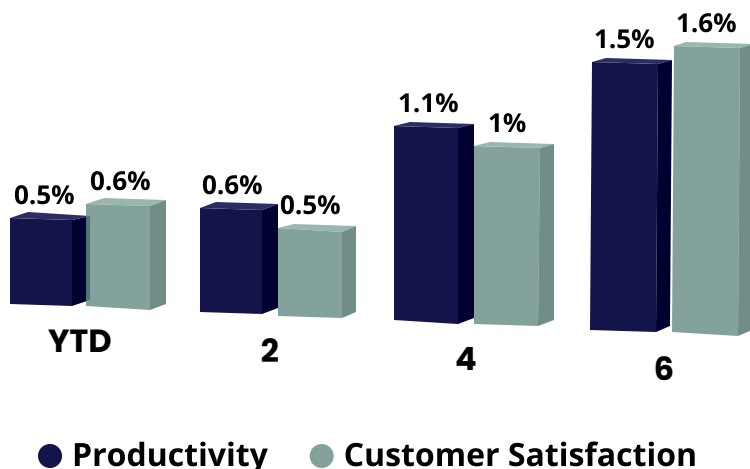
UNCHARTED TERRITORY

RESULTS

Two of the key Company objectives of the transition to remote work were that productivity did not suffer and that customer satisfaction remained high.

Customer satisfaction traditionally had been measured by feedback and repeat business or referrals. Results indicated that while employee productivity increased at a fairly steady rate after introduction of the handbook, customer satisfaction suffered initially and then began to increase. Adjustments to best-practices communication and sharing of project data were believed to be responsible for the initial decline in customer satisfaction.

Not as easily measured but equally important were employee and management level of comfort with the arrangement.



Employee productivity had been measured by the quality of the highly-technical work and timely completion of projects—including those that ran into roadblocks. Essentially, this did not change. What did change was how the success of each project was measured—now primarily through remote work-specific SMART goals and KPIs. Creating remote work-specific SMART goals and KPIs for each individual proved to be a disruptive idea for this company and a great motivator.

Both customer satisfaction and productivity were on the increase within six months from the time that employees began working remotely. No uptick in productivity was anticipated but occurred nonetheless.



EMPLOYEE RESPONSE*

Of all employees, 85% believed that the handbook was easily accessed and useful, important to the transition to remote work.



Both employees and management participated in putting the handbook together. We were just starting to bring on younger workers and we didn't always have agreement but we ultimately had consensus. We couldn't have done that if we had tried to do it ourselves.



MANAGEMENT RESPONSE*

Management, universally, believed that the handbook improved consistency and communication and the transition to remote work.

*Feedback was obtained from individual interviews

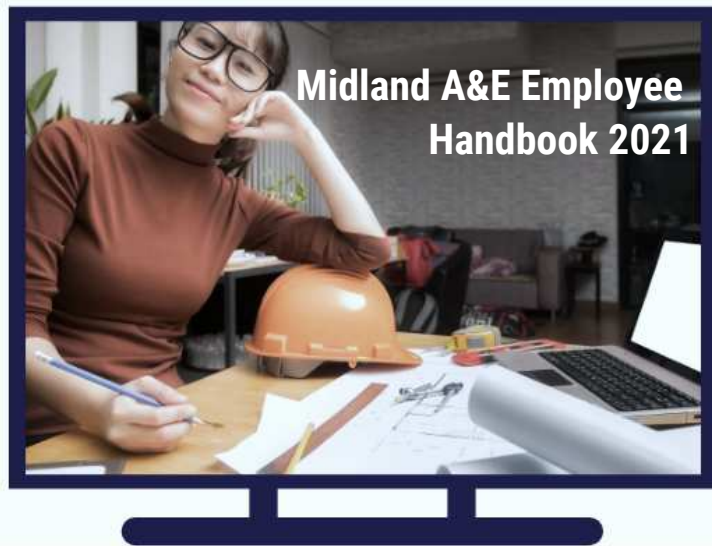
NEW REMOTE WORK ROADMAP A WIN-WIN FOR MANAGEMENT AND EMPLOYEES

CONCLUSION: POST-PANDEMIC EVOLUTION

The transformation of eight architects and six engineers into a remote workforce was as sudden as the pandemic. This staff was used to working closely together and to meeting often with clients in person, but that changed for good.

The online employee handbook that evolved was developed with the involvement of all stakeholders. The Company philosophy became the foreword of the handbook and the philosophy now included the Company vision of a remote operation. The tone was set as well by a very significant change in terminology: Because it connoted isolation, the word remote was replaced by the word distributed throughout.

Online Employee Handbook



“ I missed the office interaction at first--projects seemed more collaborative in person. But after a while, it was actually easier to concentrate at home. I was afraid my contributions to the projects wouldn't get noticed but the new handbook portal made sure that my work was recorded toward meeting my SMART goals.

**Angelina Ramos, PE
Midland A&E**

For this Company, the disruptive element of the handbook was the use of SMART goals and KPIs for both project teams and individuals. They helped measure the success of the remote work program as far as project outcomes but also proved to be a good measure of employee engagement and productivity.

The SMART goals and KPIs did not replace job descriptions or policies and procedures. They did, however, give both employees and management mutually agreed upon measures for performance and productivity. This promoted management trust in the remote work operation; and promoted employee productivity and engagement.

The online employee handbook provided employees access to: Company-wide policies and procedures; individual job descriptions; individual SMART goals and KPIs; salary information; job and productivity tools; tools for communicating with staff and clients; and learning management options.