



The Comprehensive Guide to Remote Work

Tips and best practices for implementing and
managing your remote workforce



Upwork

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A Message from Upwork's CEO

For many leaders navigating through today's challenges, remote and distributed teams are a new way of working. But at a time when remote is the new normal, what we learn through crises will help us grow on the other side.

For more than 20 years, Upwork has helped our customers transform their businesses by working with distributed individuals and teams of highly skilled professionals around the world. This isn't just a service we offer—it's in our DNA.

Every team within our organization leverages remote talent, and approximately 1,200 of Upwork's team members worked remotely even before the COVID-19 crisis. Having an agile, distributed workforce has not only helped us adapt through significant changes, but I can easily say that our remote model has been key to our success.

With that in mind, we created this guide to share our expertise so that companies of all sizes can quickly embrace a remote workforce, effectively integrate independent professionals, and maintain business continuity during this unique crisis. I hope you find these tips and best practices useful over the coming weeks, and don't hesitate to reach out if there's anything we can do to help your organization.

Most important, please stay safe, stay healthy, and stay connected.



Hayden Brown

President and CEO,
Upwork

Best Practices for Leading a Newly Remote Organization

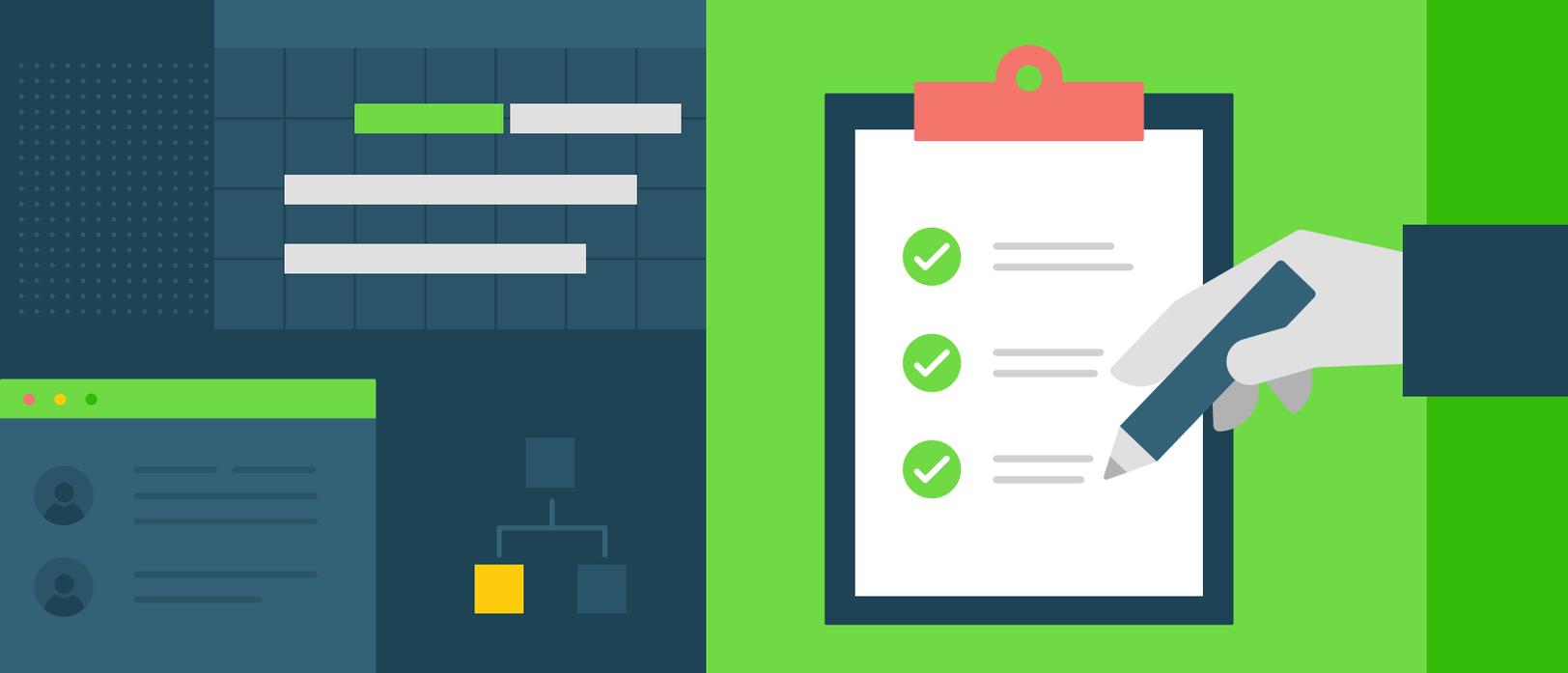
Managing a virtual team requires leaders to double down on the fundamentals of good management, including establishing clear goals, running effective meetings, communicating clearly, and leveraging team members' individual and collective strengths.

However, it can be difficult to quickly pivot when forced to adapt to a fully remote organization. Leaders can mobilize their team and in the current circumstances, this calls to mind airlines grounding their planes with a plan for today while keeping an eye toward the future with these four steps:

1. Identify a core team of critical leaders and create a plan to address key business risks as they arise

Work with this team to create an ongoing cadence for identifying, evaluating, and addressing new risks to your business. Set up daily or twice daily “stand ups” with this group and other internal leaders to check in around the following:

- **Impact to the team.** How are teams coping? What decisions need to be made for them? This could mean a work-from-home policy with steps to support them and combat isolation.
- **Impact to the business.** What are they seeing and what does it indicate about what's coming next? For example, monitor key data streams and customer feedback channels for trends.
- **Position your business to ride out the crisis—and still thrive.** What can you do to pivot quickly or minimize the business impact? As the dust settles and the path ahead becomes clearer, solutions like Upwork can help you source the skilled expertise you need to bridge talent gaps quickly. Being agile during a crisis is vital to being able to adapt to changing business conditions. Also, keep an eye out for shifts in your industry and opportunities to reposition your company for accelerated recovery once business returns to normal.



2. Build a contingency plan

Tap the same team of leaders to build out some “what if” scenarios. Outline the subsequent decisions you’d have to make for each, and align guiding principles so you’re ready. Some example questions to ask yourselves:

- What are our overarching principles and priorities in the face of a crisis?
- Which stakeholders’ needs do we prioritize, and in what order (e.g., employees, customers, partners, shareholders)?
- What if we cannot return to our on-site locations for 6 weeks? 12 weeks? A year?
- What if schools are closed for an extended period and our workers have to juggle child care?
- Who are our most vulnerable populations? How can we support them?
- What if our revenue drops by 25% overnight? 50%?

3. Develop your distributed working model muscles

Learning to lead a remote team won't just help you navigate change now; it's also valuable strength that you'll increasingly need to lean on.

- **Communicate often.** Legendary former CEO and current Intuit board chairman Brad Smith offers two critical lessons about communication. First, “in times of crisis or change, up your communication 3x.” Second, “don't wait until you have answers to start communicating. Start communicating the minute your employees have questions.” Take these two mantras to heart and both you and your team will get through this—potentially even better off than before.
- **Communicate across multiple channels.** Only 7% of communication is based on the words you use—55% is body language and 38% is voice. So include phone or video to help avoid miscommunication.
- **Establish an email cadence—but communicate big changes in real time.** A cadence can help your employees know what to expect in terms of communication. But when breaking news happens or company policy changes, don't sit on it.
- **Be available when you can, or establish virtual “office hours.”** How does an open-door policy translate when you're working remotely? Your team may still need to connect in order to discuss questions or concerns. Some ideas to make this work:
 - **Leverage video recordings.** Record valuable meetings to share later, especially if team members span multiple time zones or have uneven availability throughout the day—say, when dealing with school closures.
 - **Light up digital communication tools.** You can build an arsenal of great tools to support distributed work. Some of our favorites include Google Hangouts or Zoom for video meetings, as well as Slack or MS Teams Live Chat for more-casual conversations.
- **Remind teams to get exercise and fresh air.** If they're able to, encourage stepping away from the computer and getting outside. Feeling stuck in the house all day when you're not used to it can sap motivation.

4. Listen to your customers

Talk to your customers. Find out what's most on their minds and how you can help. It may be that your sales team dials back outreach for a period of time, or that you change up the messaging to address specific questions, needs, or concerns.

**5 Questions
Your Remote
Work Strategy
Should Address**

Adopting a remote-first perspective means looking at every aspect of your business with the assumption that anyone may be remote at any time—whether it’s an employee caring for a family member or an independent professional whose skills are leveraged on an interim basis. In today’s environment, you don’t have the luxury of anything less.

That’s why it’s essential to ask these questions when implementing your remote work strategy:

1. Who does your remote work policy apply to?

Some types of work are better suited for distributed teams than others. As you craft a strategy, consider exceptions and guidance that can be provided in such situations. For example, you may need to:

- Adjust team or organizational priorities for the quarter
- Include protocols for anyone who may need access to the office in case of a shutdown
- Purchase new equipment to keep projects on track

2. How should managers set goals and expectations?

Remote work may mean a shift in how you measure performance. In an office, it’s easy to conflate time spent at work with results. However, when teams are distributed, value is largely driven by performance vs. face time.

A **Results Only Work Environment (ROWE)** puts the focus on what someone does, not how/when/where they do it. This empowers workers to get things done on their own terms, but it also encourages accountability: Failure to deliver puts their value to the organization into question.

3. How will data be protected?

Workers need access to information in order to get things done and maintain workflows. But how do you protect your organization’s data when you have a tight timeline to get a solution in place?

- Make sure distributed team members have unique IDs and passwords
- Require the use of multifactor authentication across services where possible
- Allow remote workers access only to the data they need, and revoke access to programs and files when they leave the company, finish a project, or move on to a different position
- Make sure workers are taking precautions to ensure the security of their systems and devices

Remember that all data isn’t equal: Prioritize what’s needed now. Then rank the information by security level. It will typically fall within one of five categories: sensitive, confidential, private, proprietary, or public.

Category	Risk Level	Definition	Project Examples
Sensitive	Very High	Data often involving PII (personal identifiable information) that can put a company in financial or legal risk if publicly disclosed.	<ul style="list-style-type: none"> • Customer relationship management • HR payroll administration
Confidential	High	Data (like trade secrets, vendor contracts, and production methods) that can affect operations if publicly disclosed.	<ul style="list-style-type: none"> • Software code • Web analytics
Private	Medium	Compartmental data not meant for public disclosure but that will likely not affect the company if publicly disclosed.	<ul style="list-style-type: none"> • Customer support • Market and competitive research
Proprietary	Low	Data that is publicly disclosed on a limited basis or contains information that could impact a company’s competitive advantage.	<ul style="list-style-type: none"> • Public relations • Product development
Public	N/A	Data that may be publicly disclosed.	<ul style="list-style-type: none"> • Graphic design • Web research

Once you've mapped out your data requirements, the systems that are already in place, and any critical data, consider security measures that can be implemented quickly—such as a virtual private network (VPN)—as well as over the longer term.

4. Do workers have the tools and space needed to get things done?

From a practical point of view, your employees may not be equipped to effectively work from home. Here are a few questions to consider:

- **Do employees who need a computer have access to one?** There are **several ways** to set workers up; for a more immediate solution, consider these ideas:
- Put a policy in place to cover the **use of personal devices for work**—particularly to establish expectations around safety and security.
- Equip teams with laptops or mobile devices at work, or make equipment available to loan.
- **Do employees have a place to work?** Workers may not have access to an ideal workspace outside of the office—particularly if they're frequently in meetings or on the phone. Encourage managers to find creative solutions for their teams, such as flexible work schedules, alternate workspaces, or adjusted priorities for the quarter.



5. How will distributed teams stay in touch?

Effective collaboration for a team that's spread across multiple locations hinges on good communication. As an immediate solution:

- **Identify how teams will stay connected and set expectations.** A sudden shift to **asynchronous communication** can be jarring for anyone who's used to real-time interactions. How will they get the information they need when they need it? Set expectations to help keep responses timely and predictable.
- **Create opportunities to connect.** Find ways for your organization to stay connected, share experiences, and celebrate even small wins. For example, Upwork hosts "all hands" video conferences for important announcements and regular updates; these can be recorded and shared later for anyone unable to join in real time.
- **Pay attention to team communication channels and stay engaged.** At the best of times, good communication means clarifying and adjusting messages as needed to avoid misunderstandings. In a dynamic situation, it's even more important for managers to answer questions, correct rumors, and listen.

Choose tools that are easy to access and reliable with a minimal learning curve. For the short term, platforms such as WhatsApp, Skype, Facebook, Zoom, and Google Hangouts can be effective. For the longer term, using one full-featured platform across your organization, such as Slack or G Suite, might be a better option.

And encourage teams to avoid putting things off until they're "back in the office." Timelines are unpredictable, so adapting to new circumstances, whatever they are, is essential to meet objectives.

How to Manage Your Team from a Distance

When team dynamics are forced to adjust on the fly, mistakes are inevitable. Be patient with yourself and your team. In order to succeed, remote teams need trust: trust that each person knows how to do the work, that they're accountable to each other, and that they're doing their best in uncertain circumstances. Consider these tips to help support your team as you all move forward:

- **Be available.** Communication is pivotal to your team's success—and that includes creating space if someone needs to talk. Sometimes people just need to feel heard, whether they have a conflict with a colleague, struggle with working on their own, or are anxious about news in their community.
- **Create a sense of community.** Working from home can be isolating—something that can impact well-being as well as productivity. Find ways for your team to stay connected on a regular basis. A daily “coffee break” can give everyone a chance to catch up and talk about their day. A weekly team meeting can help everyone share successes and stay in the loop.
- **Use video calls to keep your team engaged.** Meetings have different dynamics when you aren't sitting around the same table. Circulate an agenda ahead of time so your team can be prepared, and call on each person so everyone has a chance to speak. Pause frequently so there's room for questions that may come up.
- **Err on the side of overcommunication.** Particularly while everyone adjusts to new working arrangements, share frequently—whether it's updates from the executive team or a progress report on current projects.
- **Set clear expectations, roles, and responsibilities.** Reduce duplicated efforts and cross-communication by defining individual roles and responsibilities. For example, you might be the only one with remote access to sensitive customer information; another person may liaise with IT to troubleshoot tech problems.

Learn more:

- From HBR: [Getting Virtual Teams Right](#)
- From HR Technologist: [6 Tips to Simplify Life as a Remote Team Manager](#)
- From Upwork: [How on Point Are Your Remote Management Skills?](#)

**Triage Your
Business Continuity
Strategy with
Independent Talent**

The 360-degree impact of COVID-19 means that even the most robust business continuity plans can fall short. As everyone hustles to triage immediate challenges, independent talent is helping many companies support their customers and adapt to doing business in a pandemic-focused world.

Here are five ways professionals on Upwork are helping organizations meet their near-term goals and build a more resilient future.

1. Deliver the support your customers need

Every business aims to navigate through this crisis successfully, but maintaining operations is particularly critical when your customers rely on you to keep them up and running through the crisis.

One data management company with a strong presence in the healthcare and insurance industries found itself inundated with support requests—just as their office closed and employees transitioned to work-from-home measures. Instead of amplifying the pressure on its existing team, the company opted for a more sustainable solution: scaling with experienced remote customer support specialists who could get up to speed quickly and ensure that support would be available when customers needed it most.

In another situation, a Fortune 100 tech company realized its customer support was falling behind: existing partners were unable to keep pace with ticket volume when their physical offices were forced to close. Moving quickly, the company turned to independent support reps who were already set up at home and ready to help out.

2. Help workers and customers navigate this crisis

As your company moves from one stage of this situation to the next, communication with employees, customers, and other partners is crucial: What's happening now? What will happen next? What are your expectations?

The need to capture and share that material effectively is pushing content and social media professionals to center stage.

Information is fuel for any communications strategy, and a professional content writer can help your organization share its expertise and amplify the work you're already doing. For example, great content can:

- **Help employees adapt.** A company with a newly distributed workforce found a content team on Upwork to produce a small library with everything from tailored productivity tips to guides that help people access internal systems.

- **Respond to FAQs.** One insurance agency engaged writers to help clarify its policies and policy changes. Having content that's on point and up-to-date can also help your customer support team be more efficient.
- **Support your sales team.** Sales reps are doing their best to help your customers during uncertain times. Give them updated tools such as white papers or ebooks that reflect how your industry is changing.
- **Give marketing and PR more to work with.** There's a challenge when it comes to getting attention at this time: standing out in a way that's useful, relevant, and sensitive to the current situation. A writer can help craft (or repackage) content that's appropriate for today's marketing campaigns.

Social media is an essential channel for business communication, and in a crisis that can easily be amplified: more messages from people who are already stressed out by a situation that's constantly adding new factors to consider before your team sends a response. Working with social media specialists can help boost your efficacy with real-time insights, sentiment tracking, 24/7 availability, and rapid responses in a tone that fits the context of the moment.

One global mobile communications company engaged a social media professional and a graphic designer to ramp up content production with posts that are translated and localized for all channels across 34 markets. Another is leveraging researchers and social media specialists to track ongoing changes in the marketplace, both to inform their own strategy and to keep their customers in the know.

3. Move learning online

Some businesses are turning to online courses for internal training programs or to leverage their expertise outside of their organizations. But there's a lot of demand for e-learning developers that's being driven by educational institutions.

In light of shelter-in-place mandates and closures, many teachers are moving classes online through to the end of the school year—and schools are optimizing their efforts with e-learning developers.

E-learning developers work with teachers and other experts to create materials and develop virtual learning environments that have an impact.

Some projects focus on helping teachers digitize their materials in a way that's engaging and effective. Other projects are more comprehensive with an eye toward long-term solutions: One university engaged a team of instructional designers, e-learning developers, video and animation specialists, and translators to develop the coursework needed to put all its classes online.

4. Make your content easy to find

With all the coronavirus-specific content that's being created, many organizations want to make their content easier to find and navigate. This is boosting demand for UX (user experience) and UI (user interface) designers.

One nonprofit organization built a coronavirus-focused microsite to highlight community initiatives in order to draw attention to them as well as increase the impact of the work they're doing.

5. Don't let IT issues slow down your team

Businesses rely on technology to help remote teams communicate, collaborate, access business-critical information, and get work done using a variety of applications that may be untested or new to you. That learning curve may be putting more pressure on your help desk. Independent talent can play a role here too, enabling your IT team to meet demand or adding expertise about new tools and integrations.

COVID-19 has left many organizations stretched thin as they try to meet the immediate needs of their customers while supporting their own people through the same crisis. For many businesses, independent talent is an ideal solution: It scales resources to bridge the gap while giving your existing team room to breathe and plan ahead.

6 Projects to Get Started Now

With Social Strategists

A skilled social media strategist can jump in and establish a strategy, coordinate creation of the assets you need, and monitor and post to your channels for a consistent, engaging presence during the crisis and beyond.



Starrena T.
[view profile](#)



Amber F.
[view profile](#)



Sheida V.
[view profile](#)

With Customer Support Professionals

Independent customer support professionals are equipped to jump in and help from anywhere. Whether it's via chat, phone, or email, they can help ensure operations continue amidst shutdowns or ramp up sales and leads with outbound support.



Soraya P.
[view profile](#)



Chloe B.
[view profile](#)



Misty L.
[view profile](#)

With Content Writers

Content writers are as diverse as the content they create. From ebooks and newsletters to blogs and bylines, you can find expert content writers to create high-quality content that empowers your users and builds long-term loyalty.



Jennifer L.
[view profile](#)



Rachel K.
[view profile](#)



Patrick O.
[view profile](#)

With E-learning Developers

E-learning developers and instructional designers employ a range of skills, principles, and platforms to transform classroom curriculum into an engaging online experience. Note: Depending on your format, you may also require animation, video, writing, and voiceover.



Shari C.
[view profile](#)



Lord R.
[view profile](#)



Torrie R.
[view profile](#)

With UX/UI Designers and Developers

The COVID-19 crisis has ramped up the need for digital assets and experiences. For some businesses that means getting creative with how products, services, and information are accessible to customers. UX/UI pros can ensure your customers are finding what they need, quickly and easily.



Elham A.
[view profile](#)



Anton A.
[view profile](#)



DjangoForce
[view profile](#)

With Virtual IT Support Professionals

Tech support specialists can provide hands-on, human support that's more consultative than an FAQ page. They're not just adept with software and hardware—they are also patient problem-solvers.



Josh B.
[view profile](#)



Ryon R.
[view profile](#)



Athena P.
[view profile](#)

Creating a Remote Team Strategy for the Long Haul

Almost overnight, COVID-19 turned the future of work into the current way we work—that is, companies operating as distributed (remote) organizations. Although many businesses will likely return to traditional offices once it's safe for employees to congregate again, it may not be business as usual.

More changes will likely come as businesses regroup and the economy adjusts from the pandemic's disruption. Getting businesses sprinting forward may be difficult at first, but many will adapt faster than they might have in pre-COVID-19 times because business leaders will incorporate newly gained distributed workforce learnings to help teams work faster, enhance innovation, and respond quickly to change. Put another way, businesses will become more agile.

It takes more than employees working remotely

Agility is the new business currency, according to a KPMG survey of CEOs. Before the health crisis, two out of three CEOs believed agility was critical for success. Recent events demonstrated this truth as businesses scrambled to operate as 100% remote companies, pull in external talent to handle unprecedented surges in demand, and develop new services within days to meet customer needs.

What we observed over 20 years of helping companies transform their talent sourcing, and what current events underscore, is that a business can't optimize its agility without fast access to skills or the ability to ramp up and down quickly. Both require a remote, or distributed, workforce.

Flexibility is the lynchpin for growth

Our community team learned the importance of a distributed workforce firsthand. When Upwork relaunched in 2015, our marketplace exploded—and so did the volume of questions, forum discussions, and support issues. Other internal teams, including creative and engineering, were successfully building hybrid teams to handle increased workloads, so the community team decided to give it a try. In a hybrid team, employees focus on core work, the strategic part of their role that makes them experts at what they do. Independent talent handles peripheral work, including the repeatable or highly specialized work.

Through the Upwork platform, our four-person community team quickly found the experienced talent they needed to double in size. By leveraging remote professionals, the team reduced support tickets by 36% and saved an estimated \$1.3M in service costs.

Our internal experience, and that of our clients', has show us that a distributed workforce enables businesses to raise productivity and quickly respond to changing needs. When Nasdaq's head of social media, Anna Gonzalez, was tasked with building out a complex video strategy, Gonzalez didn't have the resources in-house. So she created hybrid teams where her lean social team develops the creative vision independent professionals are contracted to execute on the work.

This distributed strategy allows Nasdaq to scale teams up and down in different locations as needed, access specialized skills quickly, and consistently produce quality work as budgets change per project. The hybrid team arrangement works so well, Gonzalez's team generates millions of impressions per client IPO, produces 80-100 Facebook Live shows monthly, and produced an Emmy Award-winning Facebook Watch program.

3 steps for building an effective remote strategy

Adopting a distributed workforce model is a journey that involves shifting processes and—just as important—mindsets. This begins by learning new tools, laying a foundation through experimentation, then building upon that success as you scale. To create a lasting distributed strategy that optimizes the effectiveness of all talent, begin with these three steps:

- **Foster a distributed mindset**

Success with a distributed model may (and often does) start gradually with a single team or initiative. But true agility happens when all teams are onboard and actively seeking ways to improve their effectiveness by working with independent professionals and when a business adjusts its processes to align with a distributed workforce model.

- **Create an agile workforce**

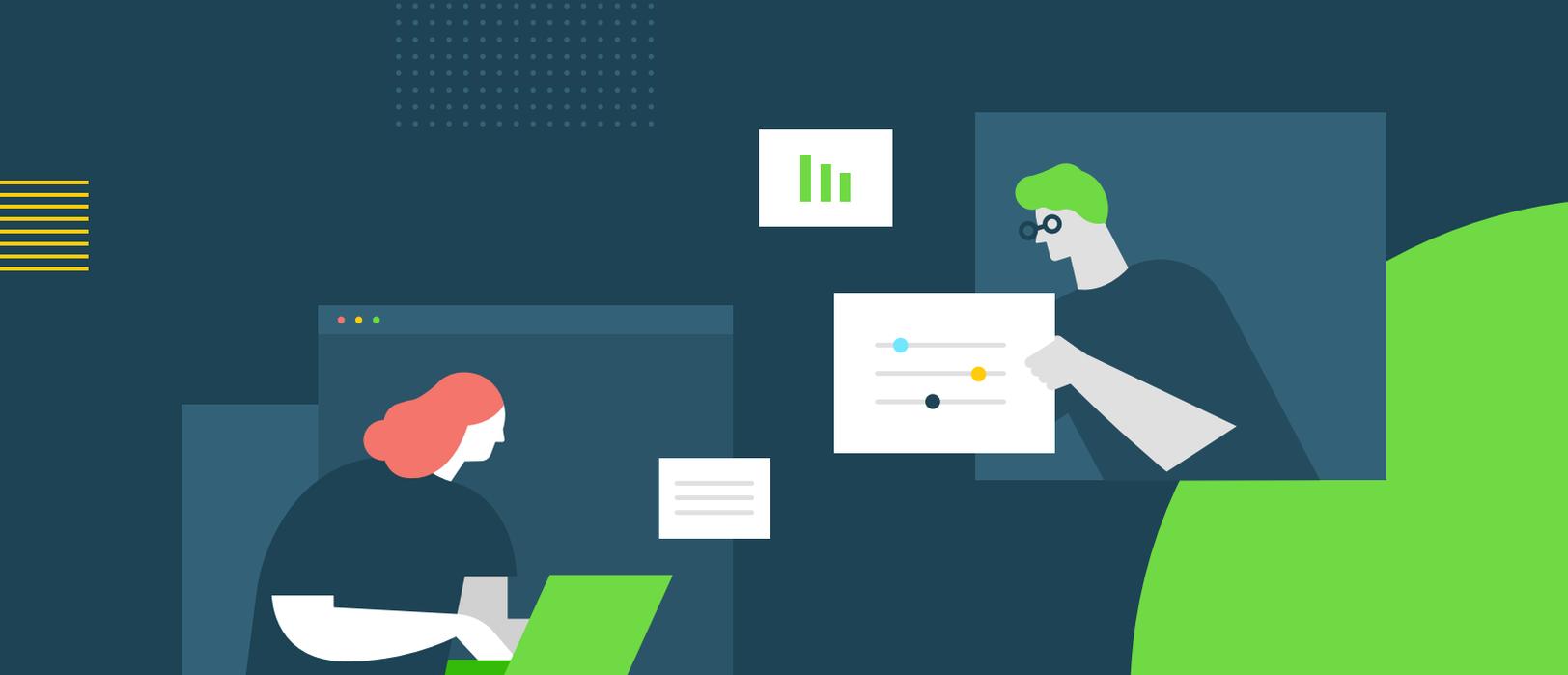
Instead of thinking of the roles needed to get work done, think of the skills needed. View talent as modular experts who move in and out of project teams for as long as their skills are required. These modular experts should include employees and external talent, who may collaborate together in hybrid teams to meet the specific project needs.

- **Assemble teams to drive effectiveness**

Instead of reaching for independent talent to plug a hole, reach for talent to fill the right (most strategic) skills gaps. This enables you to place talent to perform work that makes the most business sense. For example, if a VP of finance must spend hours analyzing data and creating a presentation for an upcoming meeting, an agile-focused company would contract a data analyst to crunch the numbers and a PowerPoint specialist to design presentation slides. This would free the VP to focus on work only they can do.

Maintaining control during unpredictable times

In the next few months, agility will likely become a top priority for business leaders, if it isn't already. Before recent events, change was already happening at a breakneck pace. And chances are, the pace will speed up as uncertainty prevails.



Rethinking How We Work

From these examples, you can see how remote teams helped start-ups to global industry leaders scale quickly, optimize resources, and be more agile. Thanks to technologies increasing efficiencies and making it easier for companies to engage the world's best talent, the myths around remote talent are fading into the past.

With so many advantages and current workplace shifts caused by COVID-19, remote teams may soon become the preferred standard for getting work done. Why not start now?

How Upwork Can Help

Due to COVID-19, successfully building and managing remote teams is more important than ever. For more best practices, tips, and how-tos, visit Upwork's [Remote Resources Center](#).

And if you'd like to learn more about how Upwork can help your business navigate this challenging time, please [request a demo](#) now.

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