

PLANNING THE TELEWORK PROGRAM

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INTRODUCTION

To insure that the implementation of teleworking policies is a success, your telework program planning should be as all-inclusive as you can afford, and seen to be both equitable and reactive to feedback. Otherwise, you may have to deal with suspicion, resentment, anxiety, disillusionment or maybe sabotage in its various forms.

The distribution of work away from the traditional office environment of a physically and socially close group of people – a sub culture – can have a profound effect on their lives and on their perceptions of what work is. Managers especially will benefit from teleworking, because poor managers learn to become much better managers, and already good managers become even better managers!

In this white paper I will set out a systematic approach that will help to redirect and refocus apprehensions, related to telework, before they become excuses for inaction. I will provide a comprehensive checklist of telework related factors for you to include in your assessment and planning process. Some of the factors may not be worth in depth deliberation, but they are worthy of consideration even if you choose to ignore them.

1. Who needs to be involved?

The team should be led by the telework "Champion" in the organization. This is usually, but not always, the person who helped to establish the Business Case for telework in the first place. Ideally, this person, if (s)he does not have a "C" in his or her title (CFO, CIO, CTO etc.), should have an open channel of communication with someone who does have.

The Stakeholders need to cover the following disciplines or activities, even if such a department doesn't exist:

- HR – important because 1.) They think that their empire is threatened – it isn't, it will grow in importance. 2.) Their involvement will be critical in the establishment and adjustment of policies and procedures. 3.) They will be carrying out an indispensable activity – training.
- Employees (Unions, if applicable) – important because 1.) Intellectual Capital is your most valuable asset. 2.) You don't have to recruit them, but it would cost you dearly to have to replace them.
- Finance – important because 1.) They won't believe your numbers unless they are involved in producing them. 2.) They can apply the needed activity-based cost identification systems. 3.) They are the ultimate repository of all budgets.
- Facilities/Real Estate – important because 1.) They think that their empire is threatened – it isn't, it will grow in importance as office space use becomes more flexible. 2.) They can bring about the genuine, not notional or projected savings in RE, which can bring the biggest bottom line benefits.
- IT – important because 1.) They can determine the most cost/effective solution that will provide the connectivity needed to get the job done in terms of speeds, levels of security and type – synchronous, asynchronous, via a WAN, VPN, wireless modem and so on. 2.) They will be a great booster for telework – this is their baby!
- Managers – important because 1.) They often feel their authority is threatened by not knowing how to control out of sight staff and therefore that telework will stop them getting the job done. 2.) They feel uncomfortable about the prospect of having to manage by results. 3.) They can make or break a teleworking program.
- Legal/Risk Management – important because 1.) They can identify activities that might go out of control, regarding issues related to insurance, FSLA, OSHA, IPR, software licensing, unofficial teleworking etc. 2.) They will be reviewing the policy changes and agreements needed to articulate the program.

- External "Clients" – important because 1, 2, & 3.) They justify the organization's existence; "No customers, no money...no food." Jeffrey Gitomer, the sales Guru.
- Internal "Clients" – important because 1.) They may fear that they will have to carry more workload. 2.) They could harbor feelings of resentment and jealousy because they are not having money and attention invested in them. 3.) They can make or break a teleworking program.

2. Assessing Organizational Resources & Deficiencies

A WORD (or two) OF WARNING!

When assessing organizational readiness, you should avoid becoming a victim of "Paralysis by Analysis"! Much of what follows will be intuitive knowledge to smaller organizations (up to maybe 15-20 employees) because of the daily contact between almost everyone employed and because nearly total knowledge of the organization's assets, strengths and weaknesses will be known in detail by 2 or 5 key decision makers.

However, the larger your organization is, the more impossible it is to be as omniscient and so a more and more formal assessment will be needed. Your project team must determine where it reasonably needs to be on the analysis continuum to be able to have sufficient information to meet senior management's expectations, and to manage and control the project without paralyzing it with paperwork!

2.A. Benchmarking or Auditing your Resources - physical, technological, human, financial and goodwill.

Determining what you have is the first step in conducting a "Gap Analysis." Then while keeping in mind the extent and type of program you ideally need, you can more easily identify and quantify the new resources needed or those that require reallocation in order to meet your program's objectives.

For each of the items listed below, or whatever otherwise applies to your organization, you need to find out what is used in the main offices to get the job done and what is already available or needed at the remote locations (home/telework center/satellite office etc.). Then you can draw up a schedule of what has to be purchased or relocated. This schedule will be used in the build up of your budgets, which then feed into your cost/benefit analysis.

Furniture/Equipment

Surge Protectors
 Backup power supply
 Desk
 Lighting
 Ergonomic Chair
 File Cabinet
 Bookcase/shelves
 Voice phone line - residential
 Voice phone line - business
 Data phone line - residential
 Data phone line - business
 VoIP phone
 Voice Mail
 Call forwarding
 3-way calling
 Cell phone/'Blackberry'

Computer Hardware

PDA ("Blackberry" type device)
 Laptop/Desktop
 -- "PC"
 -- Mac
 -- Laptop docking unit
 Modem – Dial-Up
 – DSL
 – Cable
 -- Satellite
 -- WiFi/WiMax
 Fax
 Printer - Ink Jet (B&W)
 Printer - Ink Jet (Color)
 Printer - Laser
 Printer/Copier/Scanner – Multi-Function
 Hard Firewall

Computer Software

Graphics/Design
 Collaborative – Google Docs
 Calendar/Scheduling
 MS Word
 Salesforce.com
 MS Excel
 IM
 MS Project or =
 MS PowerPoint
 MS ACCESS
 Lotus
 IE/FireFox
 Anti-virus/spam etc
 Video Conferencing
 NetMeeting or =
 VPN

Caller ID	In-Home Wireless	Soft Firewall
Videoconferencing camera	Remote Data backup (disk/CD/on-line)	
Soft PBX	Servers/LAN/WAN	
Smoke detector		

A caveat: some organizations, not wanting to invest in what might be regarded as "**just** a pilot", will be tempted to choose the least cash cost alternative, which generally translates into including amongst the first phase only those who already personally own what is considered the equipment required. Such a policy carries with it the potential of exposure to issues of unfairness and discrimination. Also, organizations that are involved in a product or service that is based on value add from Intellectual Property Rights (IPR), should check with legal council for clarification, because it can be argued that the ownership of IPR-based products may follow the ownership of the equipment on which they are produced.

A friendly word of advice: the schedule of what is needed at the remote location can easily become a wish list! Look especially hard at requests for copiers and laser printers. However, high-speed access is no longer a luxury, especially if you want to use VoIP phones. Insisting on dial-up can seriously damage productivity if your employees use high speed connectivity at work.

Benchmark/Audit attitudes to identify & assess the intensity of any concerns or fears both within & outside the organization. Include attitudinal questions that will identify what training, guidance and support is required to provide the skills, disciplines and working knowledge of the tools needed to make a program successful. You should also seek to determine, on a 360° basis, what your manager's and their staff's attitudes are towards each others' business-related abilities or lack of them. Quantify the intensity of opinions on these issues, say on a scale of 1-10 (rather than simply satisfactory/unsatisfactory), so that later you will be able to detect small shifts in opinion and so judge more accurately what's working, what's not and what changes you might need to make to fine tune your training and support.

Try to find out what affect adopting a Telework strategy might have on:

Management Issues:

Quality of work	You must decide what determines "Quality"
Quantity of work	You will need to develop metrics for this one.
Productivity	Ditto
Labor Turnover	How much might telework reduce recruiting needs & costs?
Sick Leave	How much do the respondents think telework will affect it?
Teamwork	Ditto
Internal Communications	Ditto
Corporate Identity	Ditto
Colleague Stimulation	How much do colleagues stimulate good actionable ideas?
Security	How much might information/data/records be put at risk?
Smoking	How much time is spent on "Smoke Breaks"?
Loss of Control	How big is the "Out of Sight, Out of Control" fear?
Management Style	Level of comfort with using results oriented management
Loss of "Empire"	How big is the fear of losing status if staff is not visible?
Accessibility of Staff	How big is the fear of being unable to contact needed staff?
Delegating Work	Will telework make this easier or more difficult?
Work Information Flow	How much will having remote workers affect workflow?
Work Support	Will telework mean more or less of a workload for non-teleworkers?
Office/Travel Expense Control	What affect will teleworking have on these cost centers?

Environmental Impact	How much might teleworking help the environment?
Ability of Disabled to Work	How much might teleworking help the disabled to work?
Disaster Recovery/Avoidance	Extent teleworking will help you avoid/recover from disasters?

Personal Issues:

Opportunity to be Promoted	Do respondents think teleworking will hurt their chances?
Work Support	Will telework mean more or less of a workload for non-teleworkers?
Management Style	Comfort level working under results oriented management?
Office/Secretarial Duties	How willing or able to do own clerical work?
Colleague Stimulation	How much will this change for better or worse?
Isolation	How much will loss of workplace social contact matter?
Self-Discipline	How hard will it be to start work, be able to stop working & to not lose focus?
Disruption to Work Concentration	Will this be easier or more difficult than at the office?
Leisure Time	How much will your leisure time be affected by telework?
Family Time	Will teleworking give you more or less?
Time with Friends/Neighbors	Ditto
Environmental Impact	How much might teleworking help the environment?
Commuting Time	How much will telework have a positive or negative affect?
Commuting Costs/Subsidies	Ditto
Meal & Beverage Costs	Ditto
Clothing/Personal Grooming Costs	Ditto
Personal Health	Ditto
Stress Levels/Morale	Ditto
Flexibility to Set Own Work Hours	Ditto
Design of Work Space	Ditto
Dress Code	Ditto
Smoking	Do you?
Unfamiliarity of Teleworking	How much employees fear the unknowns of remote work?
Loyalty to Employer	How much might telework stop you seeking another job?

Client (both Internal & External) Issues:

Complaints	Monitor how much they change over time?
Response Times	Ditto
Category of Complaints	Ditto
Seamless Service	Have clients had cause to notice adoption of telework?

Environmental Issues:

Increasingly, employers are awakening to the realization that benefits accrue not only to society, but also to their own bottom lines by being seen to be proactively striving to contribute positively to the environment. Investment groups are seeking out "green" organizations, and people prefer to be associated with environmentally responsible employers, their products and services. Consequently, if you want to be included in this group, you should start by quantifying the factors that will demonstrate how you have contributed to the environment over time. Specifically, benchmark employees' travel patterns to find out:

- How far they travel to the office each day?
- How many times per week do they travel to the office?

- If they transfer between modes of transport, what is the mileage for each mode?
- If they travel alone or share a vehicle, and if shared, with how many others?
- How often do they stop on the way to or from work to run errands/shop?
- On the days that they work away from the office, how many miles are driven running errands/shopping?
- What is the size of the engine of their commuting vehicle?
- What is their home's postal/zip code?

From your findings you can calculate gallons of gasoline saved. From these, when multiplied by the official vehicle EPA/DOT emissions for your employees' cars, you can compute the decrease in airborne gases (CO, NOx, Pb, and other VOCs etc) and particulate matter (PM10, PM2.5), which contribute to ground-level ozone and smog. Also, how much the life of tires & vehicles will be extended, and traffic related accidents & deaths avoided by your employees not being exposed in traffic.

2.B. Conduct a cost/benefit analysis

Now you have the information, to be combined with some assumptions that you will need to make, you can generate a cost/benefit analysis.

The most important assumption to be made relates to the value of employee time. You traditionally would assume that the value is the total cost of an employee (basic salary + employment taxes + benefits + overhead) divided by the number of hours worked. However, this costing basis would be a significant understatement of the true cost of an employee while they are being unproductive for whatever reason. **The true cost is the MISSED contribution to the organization that is NOT being made because of the different factors identified as impacting productivity.**

The easiest way to calculate this contribution is to divide the net sales per person generated by the relevant cost center/dept/division by the number of hours worked. You are concerned here with quantifying how much will be contributed to the bottom line, and having that contribution released to you is what matters. Employees who don't specifically produce sales, i.e. computer programmers, marketing strategists, finance analysts, etc., will still be associated with a profit or budget center, so the principle applies. For government organizations, the contribution calculation should be based on their budget totals (their national sales number).

2.B. (i) Effortless Productivity Increases:

You should estimate what percentage of the savings from the following factors will come through to you as increased work time and so become contributions to your bottom line:

- Commute time avoidance.
- Absenteeism/sick leave reduction.
- Office distractions/interruptions avoided.
- Business travel days avoided (use of videoconferencing & IT collaborative tools).
- Smoking breaks become anytime, anywhere events away from the office.

2.B. (ii) Savings:

You must be sure that these savings move from paper to reality!

- Real Estate (sublet of office & parking spaces)
- Common area costs (catering, vending, cleaning, insurance, utilities etc)
- Subsidies towards commuting costs (metro/bus/van pooling/mileage or car allowances)
- Business travel (use of videoconferencing & IT collaborative tools).
- Health insurance - negotiate savings as employees move to a "wellness" program.

2.B. (iii) Additional Costs:

Costs you may have to incur: (some of these are unavoidable and some are negotiable)

- Telework Project Team Manager unless you can divert an employee with equal commitment & status.
- Benchmarking and Resource audit surveys.
- Implementation training/briefings for all levels. Training is one of the key elements to success.
- Capital to enable telework (furniture, hardware, software, support desks & networks).
- Ongoing operational costs for extra line charges, "Hoteling" software, FedEx/UPS fees to transfer physical items (files, supplies, spare parts), and home office allowances; to contribute towards the extra costs of working from home such as the beefing up of electrical circuits to carry added loads, additional lighting and security, and the increased use of HVAC, and insurance riders
- The "Opportunity Cost" of having staff involved in the project team, during which time they will not be contributing (remember that one!) to your bottom line. You can include or ignore this one, depending on how rigorous your analysis needs to be.
- Policy writing, Union negotiations, Regulatory compliance (OSHA, FSLA etc.), and insurance riders to cover the remote work locations, their equipment & software.
- Support, which can include, besides training & guidance, field and system engineers, clerical services and help desks. Support has been identified by the Gartner Group as one of the top 10 non-technical reasons that telecommuting programs fail.
- Periodic program assessments to compare practices against previous survey results. Focus group meetings can reconfirm conclusions drawn from the findings.
- Making policy & procedural adjustments to the program in light of experience and survey findings.

When you finally net out all these costs & savings, do it in terms that are sure to integrate with your other management control systems -- bring your calculations back to \$'s per budget cycle.

3. Assessing Alternative Teleworking Models to suit your activities and budget restraints

There are four main types of telework that will result in different configuration requirements, and will enable work either from home, from a telework center/satellite office or as a "road warrior". Keep these models in mind during your decision process.

I am assuming that an appropriate work environment is a given for each of these, except the poor road warrior!

- **The Casual Teleworker** (sometimes called Episodic teleworker) usually teleworks irregularly on a special project, in the evenings, to avoid traffic congestion or at weekends. They will need a basic desktop or laptop, a modem to access files or to do research. The biggest issues with this type of teleworker are providing support after hours and security of data and the network associated with getting at that data. Also, because these activities are often done on an ad hoc basis, there is an element of risk control required to prevent the employer being exposed to potential liability.
- **The Formal Teleworker** works at least 1-3 days per week from home. They will need at least a mid-priced desktop or laptop with connectivity at a speed that makes videoconferencing possible, the use of a VoIP phone, and to work with large files & graphics. Because they will be making regular and lengthy calls, a second phone line will be needed. Again, support and security are big issues.
- **The Telework center/Satellite Office-based Teleworker** again works at least 1-3 days per week from these locations, which are usually only a short drive from home. Alternatively, they can be used when project teams are away from the main office for short periods. Their needs can be a blend of A & B above, depending on the scope of their activities.
- **The Mobile/"Road Warrior"** works away from the office and will usually only go to the office for special & infrequent meetings, leaving directly from home or their hotel to visit clients and attend meetings. (S)he can be on the road for most of the week. To do all this, a powerful laptop with good communications capability, which can be used anywhere, is called for. Wireless/cellular modems now make this possible. Support and security are big issues.

4. Determine what resources need to be acquired or redeployed to implement the teleworking model(s) selected.

By now you have made an assessment of what your assets, strengths and weaknesses are, and what the shape of your telework program might need to be to meet the various activities that can be teleworked. You are finally in a position to add in to the cost/benefit analysis the schedule of resources that you have to purchase to fill the gap between what you can redeploy and what your analysis tells you is needed to get the job done.

5. Tips on making a successful program -- the good, the bad and the ugly.

- Avoid "Paralysis by Analysis"- gather sufficient information for decision-making, but don't become buried by excessive paper. However, it is important to pull together a comprehensive database, because you will need it later to fine-tune your program and as a basis for making the decision on how quickly and by how much to roll out telework to more of your organization.
- Be sure to include all "Stakeholders" in the planning process.
- Don't let the determination of what is needed to enable teleworking degenerate into a wish list. You should establish guidelines early on.
- When valuing the cost of lost productivity, it is the MISSED CONTRIBUTION to the bottom line that counts, NOT the traditional employee loaded cost.
- Be generous with your training and support budgets. They are the keys to success.

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