

# Section 3

## *Tips for Teleworkers*



TELEWORKER

## Excelling at Telework

### Optimize your workspace.

*If you are planning to or are working from a home office space:*

- **Maintain clear boundaries between your work and home spaces.** Ideally, work in a separate room from the rest of your home activities. If a separate space isn't reasonable, look for ways to transition your space between work and personal time. For example, you can maintain a clean desk policy and store all your work and personal papers in separate drawers, so you won't be distracted by one while being involved in the other.
- **Invest in furniture that will keep you comfortable throughout the workday.** Check with your employer or a consultant in your community for a professional ergonomic evaluation, or use one of the free self-assessments from the [National Institute of Health](#).<sup>8</sup>

*If you are planning on working offsite, but not from home:*

- **Consider the distractions in the offsite location.** Avoid places where you will be disturbed or interrupted frequently.
- If you need to be available by phone, **make sure your mobile phone number is accessible to everyone who might need to contact you.** You should schedule calls for times when you can be in a quiet place or be close enough to one to quickly take an unexpected call.

**Use headphones** to minimize distractions in busy locations.

- **Consider data privacy and equipment security.** No one should be able to see confidential data on your screen or overhear private calls during your workday. Also, think about whether a laptop will be safe if you need to step away for a moment.
- **Do not drive and telework!** Plan to work when stopped for meals or at hotels or car pool so that you are not driving while using a laptop. Make sure to use a hands-free headset if you talk on the phone while driving. Avoid scheduling very complex or heated discussions while driving. If a conversation is overly distracting, either pull over to finish the conversation or request that it be continued at another time when you do not need to divide your attention.

### Optimize communication methods and technology.

Telework is made much easier and more efficient by the communications technology that has exploded throughout society in the past few decades. Making the most of that technology will improve your telework experience and outcomes.

- **Develop contingency plans for short notice meetings.** Ask what the plan is for getting in touch with you for spontaneous meetings. If your team doesn't have a plan, help them come up with one, and then test the technology outside of those meetings. Finding that the video feed is not working and the phone has bad reception in the middle of an emergency

meeting can be very disruptive and may reduce your team's investment in including you in these meetings.

- **Use instant messaging and status indicators** (e.g., available, busy, on the phone, etc.) to inform others of whether you can be reached. This can help reduce the concern that you are not working when you are busy attending to another work task. If there are no instant messaging options at your workplace, send an email to important stakeholders if you will be out of touch for a longer time than usual.
- **Check if your organization's phones have a call forwarding option**, which will redirect calls from your office line to your offsite workplace so others don't need to keep track of multiple numbers. If a call forwarding option is not available, be clear in any voice mail messages about how to best reach you on remote workdays. Check your voice mail routinely.
- **Use electronic calendars** which offer the option to share appointments and note free and busy times. They can take some of the mystery out of when you will and won't be available. People tend to dislike having to change dates for meetings once made, so the more information they have about your availability upfront, the happier everyone will be.
- **Don't multi task during teleconferences** as this can distract you at crucial moments where you may be called upon to participate unexpectedly. Remember to mute your phone when you are not speaking, so that the clicking of keyboards or a comment to others in your environment doesn't signal that you are not paying attention.
- **Use video conferences whenever appropriate.** Make sure the space behind you and your attire are appropriate for fellow employees to see. Relocate loud animals during important phone calls or video meetings. Let others in the area know you will be on a call, so they don't walk through the area on camera or call out to you unexpectedly from another room.
- **Be an advocate and mentor for using the communications technology that allows you to telework.** Offer to show others how to get the most out of the technologies on which you rely. Don't just count on it working all the time or for an IT person to be on hand to help you out. As the remote person, others will expect you to be the most knowledgeable in the technologies you use.

### Telework Wellness

Plan your offsite workday, so you do your work when your attention and energy is best focused on it. For example, if you are a morning person, do your hardest or most creative work in the morning when your energy is high. Leave the more routine tasks for later in the day when you won't need as much attention to do a good job. Coordinate with your team, so they don't disturb you during this time and so you know to deliver what they need to get their jobs done during your focused work periods.

- **Set up a routine for eating and taking breaks.** You won't have coworkers on hand to provide you reminders to go eat or help you refresh your thinking with a break, so set an alarm

on your calendar, clock or a wellness related app instead. Similarly, sticking to this routine can keep you from overeating when food is just a short trip to the kitchen away.

- To prevent eye strain, **take breaks from the computer** wherever you are working, but especially at home where you won't have natural interruptions to give your eyes a rest. A good rule of thumb is to take two 15-minute total breaks from work as well as four five-minute pauses, evenly spread throughout your workday to rest your eyes. Or use the 20-20-20 rule. Every 20 minutes, look away about 20 feet in front of you for 20 seconds.<sup>9</sup> Don't worry about productivity during these breaks. Taking breaks can help improve efficiency, so the same amount of work can get done in less time and with less strain on your eyes.<sup>10</sup> You can also use the pauses to take a moment to strategize or plan next steps for your day.
- **Proper nutrition and hydration** can suffer if you fall too deeply "into the zone." Make sure you have water near your desk (in a safe container). Prepare healthy snacks in advance (perhaps during the time you would otherwise be commuting), so you don't get tempted to just grab a bucket of ice cream from the freezer.
- Even though working offsite provides more flexibility around stop and start times, **being consistent is still good for you** (keeping work stresses from invading your recovery time) and helps your coworkers understand that working offsite does not mean working all the time. If your start and stop times are too fluid — or you don't coordinate your start and stop times with your coworkers — you may find that you end up always being "on."
- **Establish a daily habit to transition from work to home** (e.g., change of outfit, shut down computer, step outside) to mentally indicate your workday has ended. Consider adapting habits that worked for you when you only worked onsite. For example, if you've always had a long commute, take a drive around the block to make use of old habits in new ways.

### TO CALL OR NOT TO CALL: IS THIS AN EMERGENCY?

**Important tasks** have significant effects on your overall work outcomes.

**Urgent tasks** are time sensitive and need to be done relatively soon if they are to be done to best effect, but the results may or may not be significant.

**Tasks that are:**

- **just important** need to be done, but there is still enough time to do so without disrupting normal operations;
- **just urgent** may need to be done soon, but probably aren't worth the cost in resources and morale to disrupt normal operations; and
- **both important and urgent** are worthy of disrupting normal operations and calling someone during their off hours.

However, urgent tasks can create feelings of stress that give the impression they are important. Being able to know the difference between tasks that are one, both or neither of these things is essential to proper prioritization.

## Staying on Target

- Do a time management self-assessment. There are plenty of free ones available with a quick Internet search. However, they all generally come down to a few key questions:
  - ✓ Do you regularly plan how you will use your time?
  - ✓ Do you regularly keep to those plans, despite the usual amount of distractions?
  - ✓ Do you regularly prioritize based on importance rather than urgency? (See sidebar: To Call or Not to Call.)
  - ✓ Do you regularly recover from interruptions and get back on track?
  - ✓ Is your output at the end of the day typically what you expected at the start of the day?
  - ✓ Do you usually need to work longer than you expected to achieve what you had planned?

If the answer to any of these questions is no, you should spend some time thinking about why. This is a good time to talk to a trusted colleague or your organization's employee assistance program — if you have one — or others about how to assess and improve your work habits and how you structure your time. This reflection period is also a great opportunity to engage the entire team in a discussion on how you can support each other's time management for ongoing success on and off the job.

- **Write down your work hours and tasks accomplished**, either in a journal or through regular (usually weekly) emails with your manager and/or colleagues. Being able to look back through emails that show the history of your telework situation and your accomplishments can make conversations with managers easier. It can also help them feel more connected to you and the work you are doing, even if they don't see you every day. It will also make their job easier at performance review time, providing a more reliable record of your accomplishments than mere memory.
- Although it's essential to have a core defined workspace to help separate work time from home time, **add a little bit of diversity to keep the day from becoming monotonous**. For example, taking phone meetings in another room or sitting in a different chair can help provide some additional novelty throughout the day and refresh your attention during important moments.
- **Check your computer apps for automated triggers and distractions**. Deactivate alerts that pop up during the day for things that can wait until after you are finished working or during a break. For example, if your phone alerts you to every new Facebook update posted by your very active social network, either disable that feature during the day or put your phone far enough away so that you can hear it ring in an emergency, but don't hear every buzz. Let people who regularly text you during the workday know that you need to focus during those times and that you will respond during breaks or after work, so they are not surprised by your change in responsiveness. Remember that communication technologies are there to achieve your goals. You are not there to respond whenever they buzz.

- **Create routines to help you resist distractions.** Beginning your day with a routine set of actions — like clearing email, creating a list of key priorities for the day, etc. — can help anchor you in your work mode and help shut out distractions. It is best to be deliberate about creating a routine and doing it when you first start teleworking. It will be much harder to establish a good routine later on if you find you have problems focusing, since that means both undoing a bad routine — which often takes a lot of work — and starting a good routine.
- If you have other people in the home during your workday, **communicate your routine** to them so that they can use that as a signal that you have shifted to your work mode and should be left alone as much as possible. Be clear about how you signal to them when you are working or taking a break. This way it won't feel like you are ignoring their presence all day, but, rather, communicating when they won't have to compete with work for your attention.

### Managing Relationships with Your Family and Friends

- Just like coworkers can disrupt your workflow during the day with unscheduled visits, family and friends who don't understand that you are *working* at home may also interrupt your day. Don't wait till they pop by to explain your work situation. You may not have time to keep them from being hurt by a brush off. **Before you start working from home, take a moment and explain** to them:
  - ✓ your regular work times
  - ✓ your regular break times when you would invite a distraction
  - ✓ the list of emergencies that warrant breaking into your workday
  - ✓ any non-verbal signals for when you are on and off duty

The non-verbal signals, like a closed door, a sign, background music, etc. are especially important to discuss, as these are easily confused. For example, if you work best with background music, someone else may interpret that as a sign that you are off duty and feel free to interrupt you, and then they may be hurt when rebuffed.

- **Communicate with others who must share your space** on how their activities during the day may affect your work, and collaborate on how they can do what they want while not disturbing you. Negotiate things like:
  - ✓ appropriate music and TV volume levels
  - ✓ whether your work room is open for them to pass through or spend time in, as well (such as when the computer is in a shared bedroom rather than a private office)

In any conversation where you might ask someone to change their behavior, it is always best to start by engaging them with what they want and need, and share your interests. Once your mutual goals are on the table, then you can look for ways in which everyone can continue doing what they want without interrupting you. That may necessitate change on one

or both your parts to come up with a good solution. For example, headphones for a partner who needs to listen to music while working at home when you need quiet is the kind of situation you need to resolve with conversations. These conversations are best had outside of a specific moment of conflict when you can talk about how you want things to be going forward rather than how they are flawed in the moment.

- When someone who isn't yet in tune with your offsite work arrangement interrupts you, it's important to be clear about what you are doing and when you will be free to address their concerns. A good basic response to a family member or friend trying to pull you away from your work is something like: "I would like to spend time with you, too. I work from home from 9 am to 5 pm on Fridays, and my team is counting on me to get through my work when I said I would. I'm free at 6 tonight to catch up." You should change the words to be more personal and true to your voice, but remember to include the following elements in your response:
  - ✓ Show your interest in spending time with them first, so they know it is not a personal rejection.
  - ✓ Provide a clear indication of what your unavailable work times are, so they can avoid coming back later and getting the same message.
  - ✓ Recognize that there are still people expecting to be able to contact you and counting on your productivity to get through their own workdays.
  - ✓ Suggest a time to connect later, so you don't let work distract you from making important personal plans.
- Telework can be a great boon to parents by reducing commutes and providing some additional flexibility around **managing work and child care responsibilities**. It can also be helpful for tending to a sick child who just needs his/her condition monitored throughout the day while resting. However, telework is still work, and combining it with regular child care — especially infant care — is not easy, as work and children can both demand your attention at unexpected moments. While it may be reasonable to take an occasional telework day, with your supervisor's permission, to deal with some minor child care issues, your responsibility to your employer is to be available during the times when you are teleworking. Combining telework and child care is often unfair to your employer, your children and yourself. It is generally best to secure separate child care during work hours, so that you can focus your attention on your work.

### Managing Relationships with Your Manager and Leadership

- **Be proactive with your manager.** Actively share information on a regular basis and choose to err on the side of over informing. It is much better to have your manager say: "I trust in your work. We can scale back the updates" than "I'm worried that I don't know enough about what you are doing. Can you update me more?"

- **Establish a standard method for updating your manager on your progress before you start teleworking.** Include the following in that conversation:
  - ✓ Best method(s) for updates: phone, email, regular in-person meeting when you are onsite, etc.
  - ✓ Best frequency of updates: daily, weekly, biweekly, etc.
  - ✓ Content of updates: timelines, conversations with clients, opportunities and challenges, etc.
  - ✓ Format for the updates e.g., including what you've accomplished this week and what you plan to accomplish next week for each of your major projects. If you need your manager to respond, you can indicate that with highlighting.
- Providing updates can feel like a pointless labor if you don't know how or when you will get feedback on them. Clarifying that up front can ensure that the updates are tools to advance your performance and career. **Determine how and where your manager will give feedback on your updates.** Will it be by reply email, phone or some other method? Is no response the equivalent of agreement? Or is it a sign that communication is breaking down?
- **Ask your manager(s) for their expectations** around:
  - ✓ availability (how quickly you need to respond to email and phone calls)
  - ✓ what happens if you are needed onsite on a regular telework day
  - ✓ best method for short notice contacts
  - ✓ reasonable boundaries for your workday e.g., should you accept a call an hour after your workday officially ends? After two hours? Four?

You should also consider your opinions on these things and whether they align with your manager's perspective. If the two of you don't agree, make sure to have a talk about it as soon as possible to avoid confusion or resentment later.

- **If a sensitive situation emerges** — where you or someone else may have a strong reaction to a situation — **avoid email discussions.** Request a phone or video call to add greater depth to the dialogue. Do this for both positive and negative situations. It will give you the opportunity to head off misunderstandings around bad news. For good news, a call is important to tie you and your contributions to the announcement, helping your manager remember your connection to the good news when performance evaluations come around. Sending a follow-up email with the resolution of your conversation further cements your contribution onto the official record.
- Just because you are not available for your supervisor to pop into your office for an unscheduled chat doesn't mean that you are not still expected to be responsive to impromptu phone calls or emails about the status of your projects and people. **Be ready for an unexpected phone call** by keeping your records organized and your personal logs up to date.

- **Make the effort to describe your successes and challenges to your manager** whenever you get the chance. As a teleworker, you are losing some face time that may affect his/her memory of your contributions. Plan a few key updates to give when you are onsite or during a phone meeting. Consider what kind of accomplishments to mention in meetings with other leaders to expand your network and reputation beyond your manager.
- **When you are onsite, make sure to schedule in-person meetings with your manager(s) and other key leaders and colleagues** you should be getting to know. If you need to deliver something, don't leave it in their box. Drop it by their office in person. Adding the personal touch whenever you are onsite to provide it can help tie your face and identity to the voice they hear on the phone.
- **Remember that your work can still be disrupted by unexpected and important issues that need to be addressed immediately.** Make sure to communicate issues to your manager and other relevant stakeholders, particularly if deadlines or other work processes need to be changed.
- **Remember that these agreements are not set in stone.** You should speak to your manager and other stakeholders in your work whenever you think adjustments can be made that will help one or both of you better achieve your goals.
- **Keep in mind that your manager also has work-life issues of his/her own.** Volunteering to use some of your freed time to help him/her get more time will reinforce the idea that work-flex is a "team sport." When your manager sees that work continues to get done — and both your lives are more successful on and off the job — he/she will be more likely to support telework if the continued existence of the program at your organization ever comes into question.
- **Consider the use of project management software** that can be used collaboratively with your supervisor and colleagues, such as Microsoft OneNote.

### Managing Relationships with Colleagues and Clients

- **Remember that your teammates are also affected by your telework schedule** and how it interacts with their work-life fit. Encourage mutual feedback on how the team is working together by asking for feedback on your telework. How does it affect them? Do they have the communication options they need to get their work done and to assist you with yours? Do you all have the kind of relationships you need to be collaborative with and be supportive of one another regularly and when things change?

If there are things you or your colleagues can do to help make telework more successful for everyone, discuss how you can make that a reality. Be realistic about whether the requests are easy to put in place. Remember that everyone has his/her own work, personal and family concerns. Solutions that address the interests of all stakeholders will have the greatest chance to be enacted and to endure.

- Just as with your manager, being deliberate with how you communicate (video, phone or email) can help you build better working relationships with your teammates. **Whenever**

**possible, schedule business lunches or coffee meetings to catch up on projects with colleagues** — informal connection time is important in maintaining relationships. A lunch meeting doesn't have to be in person. Though it may feel odd to do so, a video chat at your desk while you and a colleague eat lunch can be a good way to bond across long distances, especially if you otherwise communicate a lot via phone or email.

- **Colleagues in other departments also need to be considered when constructing your communication plans.** Since they are not on your team, they may not receive briefings or memos updating people on the telework process or your schedule. Lacking such information, they are more likely to complain when they need something and you are unavailable, especially if they aren't engaging in some level of telework themselves. Head off future problems by identifying key communication channels between you and other departments. Give them an explanation of how your telework will function and how to get in touch with you. For example, approach people in other departments who make regular requests with short deadlines before your telework starts. Explain the process and ask for their input on what kind of contact options (e.g., phone, email, regular meetings, etc.) and notice of your schedule they need to do their jobs. By involving them in the process from the beginning, you can avoid many future problems. If problems do emerge, having them participate in the initial design of the process will make it easier to persuade them to help you improve on your telework process rather than demanding that telework be ended all together.
- A primary complaint about teleworkers is that they are not available when needed. **It is important to manage your reputation for availability and make sure colleagues, managers and leaders all perceive you as being available when you are scheduled to be available.** Make sure to inform stakeholders in your work if you will be unavailable when they might expect you. Similarly, if you cannot respond promptly to emails and calls, give them a heads up on when you may need a longer time period to respond than usual. That includes times when you take a break, a few hours off for a doctor's appointment or a vacation or if you are going to focus on a deadline and not check email as regularly as you usually do. Make sure to mention these moments widely in staff meetings or to other stakeholders in direct conversations. That way, even if someone is disappointed in your unavailability, another coworker can remind that person that you were scheduled to be off and help reinforce your reputation as responsive even when you are not present.
- **Be patient.** Just because you tell someone you are teleworking next Friday, doesn't mean he/she will clearly remember it when that person has an emergency on that Friday and panics because you are not at your desk. **Give people time to adjust to the new situation and try a number of the communication tips several times before deciding it doesn't work for you.** Often, people need to forget and be reminded a few times before changes in work habits truly stick.

### Professional Development

- Even though you may be physically alone when you telework, you are still very present in the virtual workplace. **Reach out to other teleworkers, whether they are on your team**

**at not.** Use your telework experiences as a way to create networks that can be a source of innovation and ideas, so that teleworkers become a uniquely valued resource of 1) tips and strategies for successful telework at your organization; and 2) mentors and sponsors who are invested and experienced in advancing the development and career options of a teleworking employee.

- **Take the time to develop your own professional development plan.** Create lists of the:
  - ✓ trainings and conferences you need to attend to develop your skills and networks
  - ✓ assignments that you believe would position you for an assignment you really want or a promotion
  - ✓ people to whom you would like to be introduced in organizational leadership
  - ✓ positions you would like to be promoted to over the course of your career

Share these lists with your manager during an in-person meeting, if possible, or during an annual performance review, if there's no other appropriate opportunity to have a career discussion. Revisit this list throughout the following year. If you are not getting the opportunities that you and your manager agree are appropriate, reach out to your manager for guidance or support, as appropriate.

### Common Emotions

Telework is a different emotional experience than working in a collective worksite. The social interactions tend to be shorter, more transactional, more formal and less frequent. That can result in some less positive feelings that you will want to watch out for and defuse.

- **Isolation.** It is very normal for people — especially those who thrive on social interaction — to feel lonely at the end of one or more days of telework. Some methods for countering these feelings are to:
  - ✓ Plan after-work activities that include being around people. Note that just being out around people can be satisfying even if they are not your friends or the interactions are short. A trip to the grocery store or other task in a public place can feel refreshing after a day of working alone.
  - ✓ Use richer communication media for your work interactions, like video chats and phone calls. Interacting with a coworker in real time where you can see a facial expression on your screen or hear them laugh to a joke will be more rewarding than the same exchange on email.
- **Fear of being “out of sight, out of mind.”** You may at times feel like you are being forgotten during the planning of events or your contributions are not getting as much attention as they would if you were onsite. These are real considerations for a teleworker, especially if there are not many teleworkers in your organization. Some things you can do to stay present in your colleagues' minds are:

- ✓ Make sure to set up regular catch-up calls with key contacts onsite. Even if they are short five minute calls, these calls insert your presence into *your colleagues'* routines in a way they will notice and remember.
- ✓ Take every reasonable opportunity to attend major events like celebrations of success, project kickoff meetings and other events that are important or memorable. Even if you could provide the same contribution remotely, your presence will create stronger ties between you and your ideas and contributions to both the work and the culture of your organization.
- ✓ Recruit a meetings advocate who will make it his/her responsibility to mention you and whether you should be included in a meeting. This should be someone with whom you communicate regularly and who understands your contributions to the team. This person should ask anyone calling a spontaneous meeting whether it would be worthwhile to dial you in.
- ✓ When you are included in meetings remotely, make an effort to offer a comment, idea, question or other sign of your involvement. You will need to be more proactive in showing your engagement than if you were present. For example, if you find yourself nodding at someone's idea (which is invisible to the rest of the team), take the moment to voice your agreement. Your voice will often be all anyone can perceive of you in a meeting, so make sure to use it.

### Evaluating My Success

Don't wait for others to tell you if your telework situation is working for them and the organization. In general, people do not take the time to point out things that are going according to plan. They also tend to avoid mentioning small fixable problems until they have expanded into larger problems with a lot of negative feelings built up. Take the initiative to gauge your own success every few months by:

- ✓ asking your supervisor and coworkers directly whether things are going well and if there are any changes that would make things better;
- ✓ checking in with important stakeholders — like regular customers — to see if they are getting what they need when they need it (a good idea whether you telework or not);
- ✓ looking back through your assignments and make sure they have been completed successfully and in a timely manner;
- ✓ considering whether your technology (computer, phone, access to servers, etc.) meets your present and future needs for communication and data management;
- ✓ confirming that any concerns and or problems you or another stakeholder have raised have been fully resolved in a timely manner; and
- ✓ documenting how your telework has been beneficial for you or the organization (e.g., better customer service, faster response times, less overall stress, etc.).

Clearly, successful telework programs are more involved than simply allowing employees to work remotely. There are health and wellness, communication, performance management, and other considerations that make the difference between having telework and capitalizing on telework.

The preceding tips are a broad overview of the kinds of things the average teleworker should take into account when starting to telework. Though Sections 1 and 2 of [Workflex and Telework Guide: Tips for Anyone to Work Anywhere](#) are written for HR professionals and managers, teleworkers familiar with how to integrate the advice in all three sections of this Guide will be well positioned to use telework to achieve their goals both on and off the job.