



# Sustain Work-From-Home in the New Normal

Ensure work-from-home is planned, integrated, and supported during the pandemic and beyond

# Executive Summary

## McLean & Company Insight

The emergency work-from-home (WFH) program won't sustain itself: it's a significant change that requires choosing the right long-term options for your organization and ongoing efforts through supporting programs and change management.

### Situation

COVID-19 pushed organizations that were previously resistant into an immediate work-from-home experiment. Speed was the priority, so support (e.g. tools, training, and logistics) and integration into organizational and HR programs required for a successful program are lacking. The work-from-home (WFH) actions taken at the start of the pandemic were not meant to be long-term, but as time passes both employees and employers recognize there is a need for a more permanent solution.

### Complication

Not all roles are able to work from home; the ability to WFH varies throughout the organization. Organizations lack a clearly defined, unbiased approach to determine who can continue to WFH on an ongoing basis and who needs to return to the workplace. In addition, some employees want to return to the workplace regardless of whether their role can WFH.

### Solution

Sustain WFH opportunities for employees by creating a planned, integrated, and supported program that maximizes the benefits of flexibility while supporting both organizational and employee needs. Using an in-depth analysis of work duties, processes, and operational outcomes, along with the development of clearly defined program parameters, transition the current short-term emergency WFH arrangement into a successful and unbiased long-term WFH program.

# Leverage McLean resources to support each stage of sustaining work-from-home (WFH)



The information contained in this storyboard is not intended to replace legal counsel, government legislation, or public health regulations. Complement the blueprint with legal advice on considerations specific to your jurisdiction.

1

## Launching WFH in response to COVID-19

- [Emergency WFH Assessment Tool](#)
- [Bring Employees Back to the Workplace Amid the COVID-19 Pandemic](#)

This blueprint uses the organization's emergency WFH and return to the workplace plan to segment and identify work units and employee segments that are under consideration for sustained WFH programs.

2

## Sustaining WFH through the crisis and beyond



You  
are  
here

This blueprint will provide a process for organizations to transition their emergency WFH plans to WFH programs that are **sustained long term**.

Any considerations that must be made to comply with mid-term physical distancing requirements as a result of COVID-19 that may impact decisions will be called out and **indicated in green**.

3

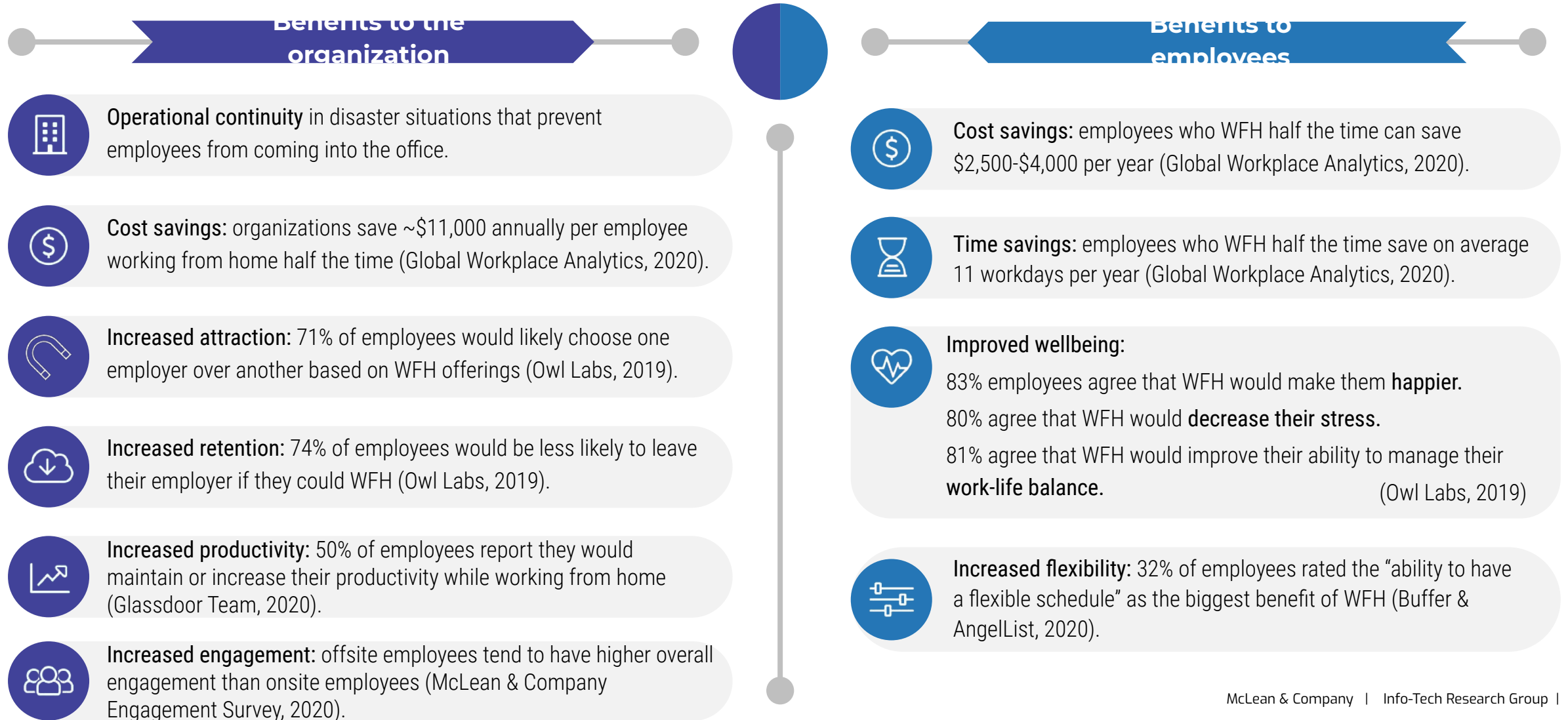
## Related resources

- [Equip Managers to Effectively Manage Virtual Teams](#)
- [Manage Poor Performance While Working From Home](#)

# Glossary of terms

Terms	Definitions
<b>Work-from-home (WFH)</b>	<p>Employees work within their homes rather than commuting to a central location for work.</p> <p>Given the current COVID-19 environment, where travel mobility is restricted, this blueprint will focus on WFH options rather than remote work, excluding guidance on asynchronous communications (where a response isn't expected immediately) and other considerations that go along with a work-from-anywhere program.</p>
<b>Remote work</b>	<p>Employees work from somewhere other than the central work location, whether from home or elsewhere (e.g. while traveling).</p>
<b>Mid-term view</b>	<p>Time period in which the COVID-19 pandemic influences decision making.</p>
<b>Long-term view</b>	<p>Post-pandemic time period where COVID-19 implications do not influence decisions.</p>
<b>Onsite</b>	<p>The physical location of the workplace, such as an office, client site, plant, etc.</p>
<b>Offsite</b>	<p>A location other than a central location of work, such as employees' homes.</p>

# Remote work programs provide many benefits for both the organization and the employee



# However, barriers to WFH have prevented organizations from implementing it in the past



## ORGANIZATIONS

- Concerns that WFH may **stifle innovation** (The Economist, 2020) likely due to the potential lack of collaboration and knowledge sharing.
- Fewer organic opportunities for **informal interaction** between employees working from home means active efforts are required to ~~foster organizational culture~~.



## LEADERS

- 42% of managers believe that **monitoring the productivity** of their direct reports is a top challenge of WFH (Ultimate Software, 2019).
  - The **lack of in-person supervision** compounded with a **lack of trust** in employees leads many leaders to believe that WFH will result in a drop in productivity.



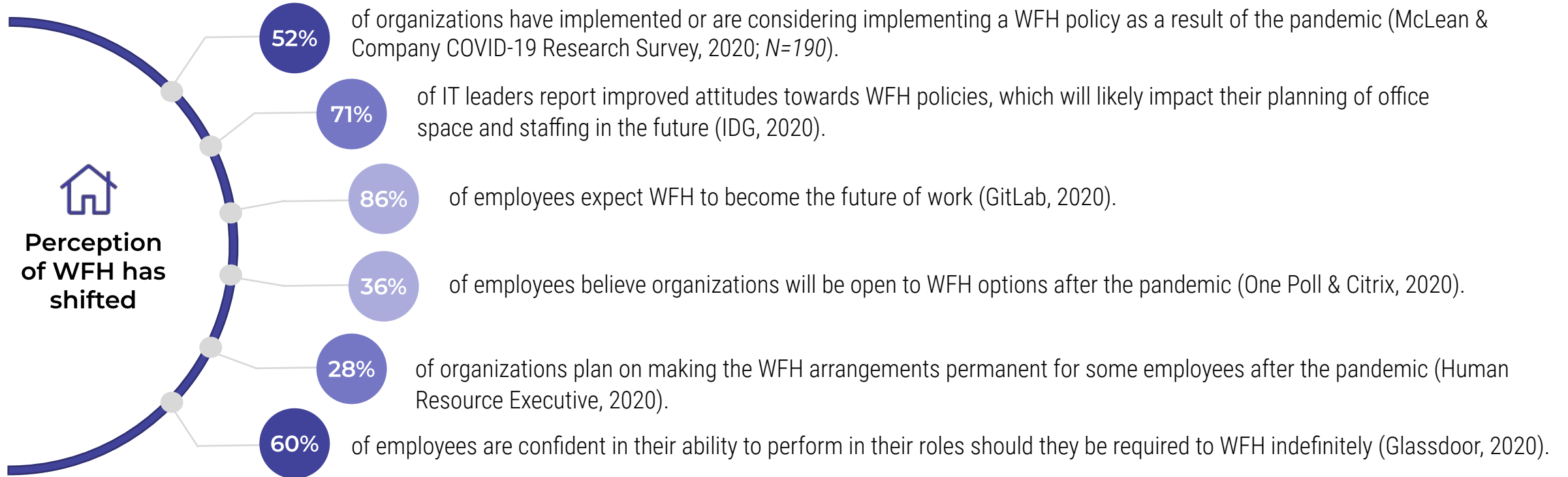
## EMPLOYEES

- 20% of employees report **collaboration/communication** as their top struggle with WFH (Buffer & AngelList, 2020).
- Employees often experience **burnout** from working longer hours due to the lack of commute, blurring of work and home life, and the perceived need to prove their productivity.

Many of these barriers can be addressed by changing traditional mindsets and finding alternative ways of working, but the traditional approach to work is so entrenched that it has been hard to make the shift.

# COVID-19 has changed the WFH landscape

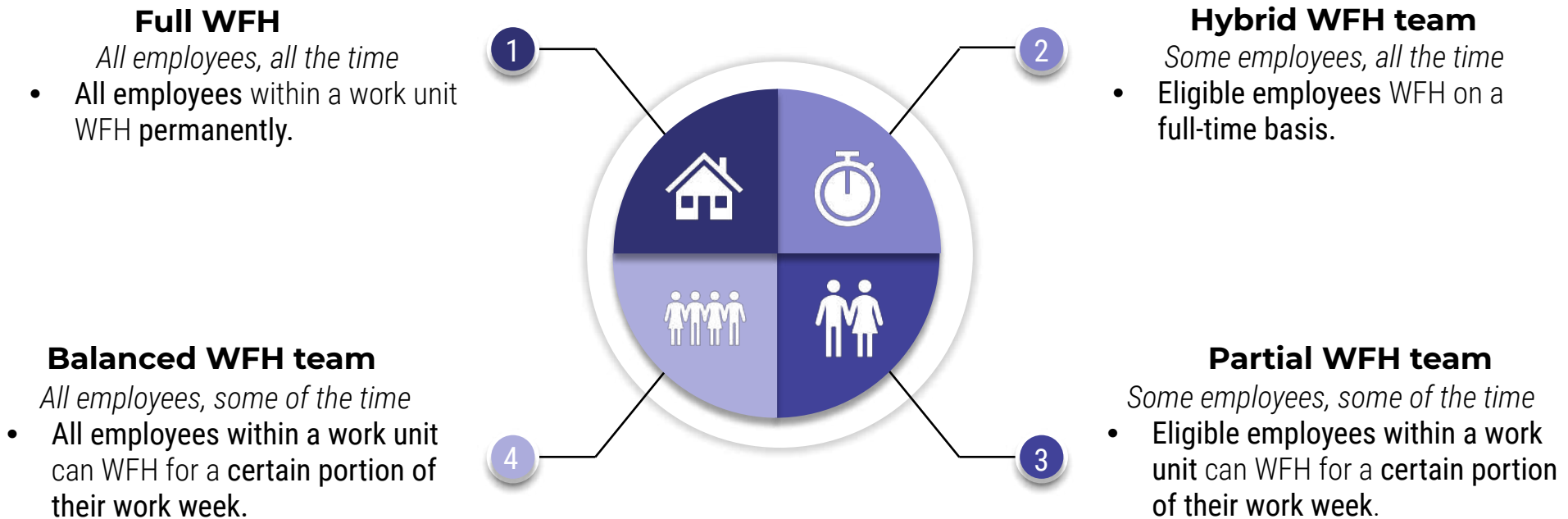
**Myths, entrenched norms, and inertia have previously curtailed the pursuit of more permanent WFH programs. However, COVID-19 has led to a 72% decline in onsite work (Aternity, 2020) and a shift to WFH, which has in turn changed employers' and employees' perceptions.**



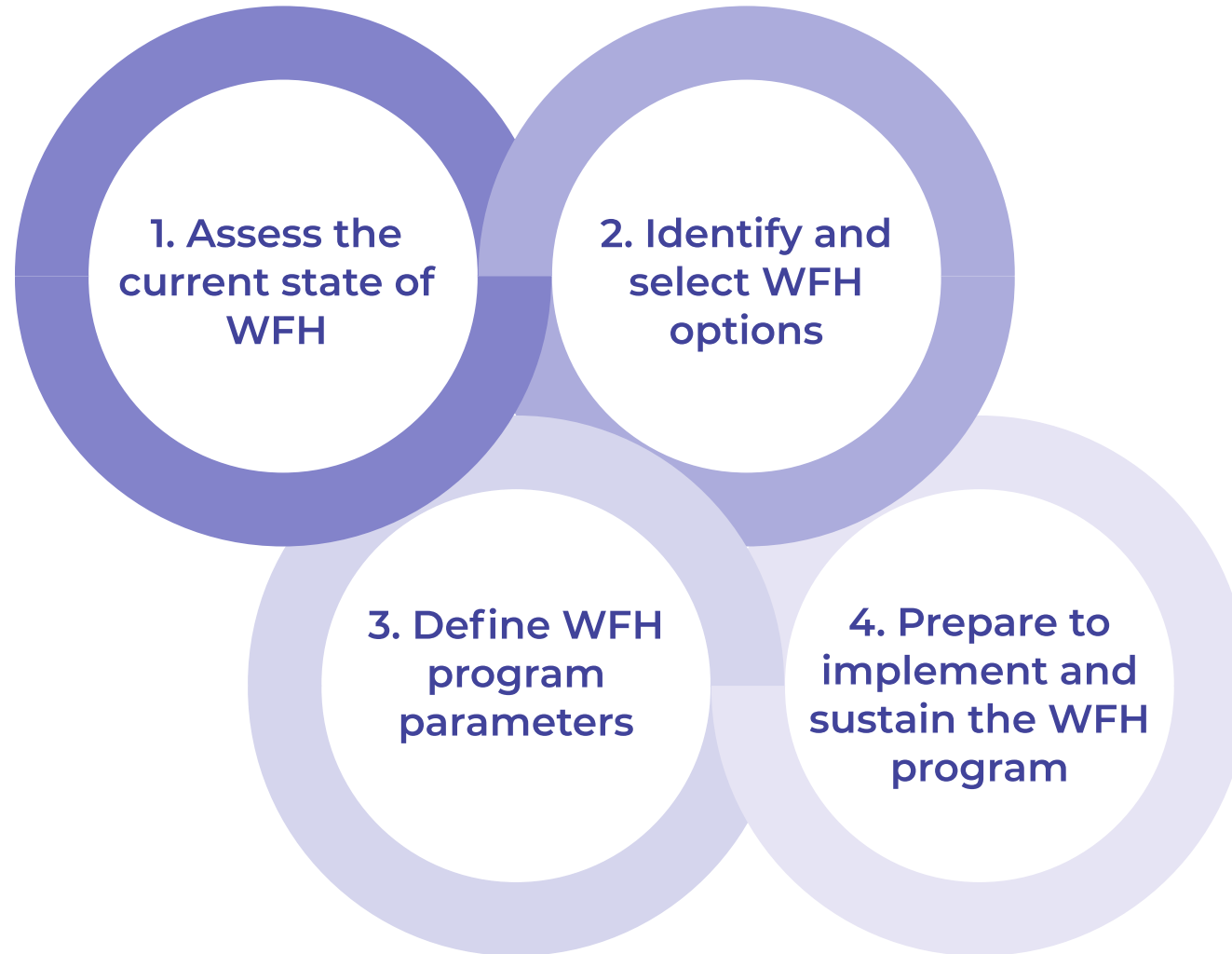
Workplace changes spurred by the realities of COVID-19 have been so seismic that it is highly unlikely things will go back to the way they were before. As a result, many organizations are looking to implement permanent WFH programs that will continue beyond the pandemic.

# There are many WFH options available to organizations during and beyond the pandemic

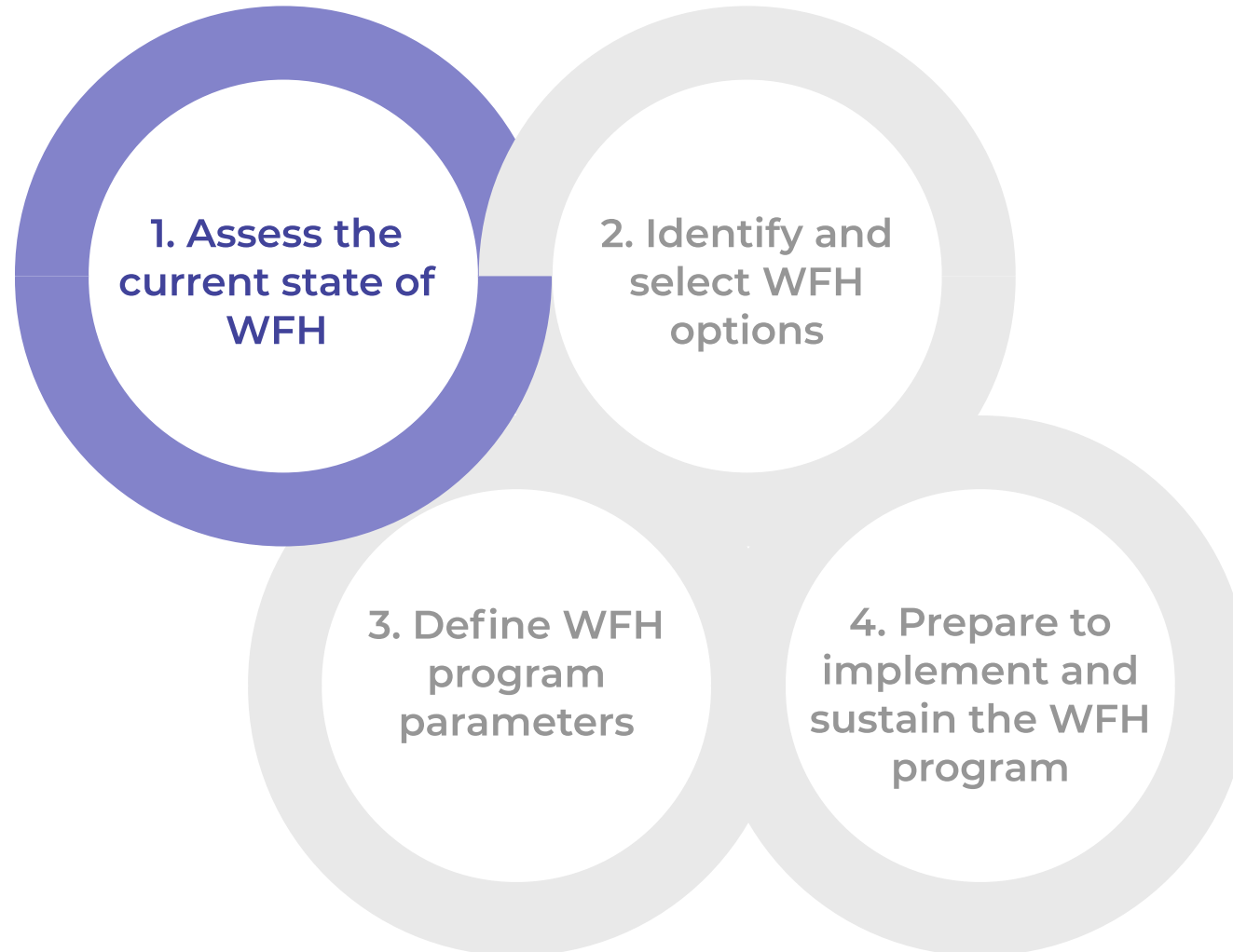
Full WFH is not always the best option for the organization or employees. Each option comes with its own benefits and cautions and will be addressed in more detail in Step 2. This blueprint will help you implement the WFH option that best suits your organizational context and balances the needs of the organization with those of the employees.



# Use McLean & Company's four-step approach to implement a sustainable WFH program



# Step 1: Assess the current state of WFH



# Step 1 Summary

Activities	Who's Involved	HR's Role	Timeline
<b>Form a planning committee</b> 1. Involve key stakeholders in the planning committee. This committee may be the same or have some of the same members as the return to the workplace planning committee.	<ul style="list-style-type: none"> <li>Planning committee</li> </ul>	<ul style="list-style-type: none"> <li>Create planning committee by consulting and involving stakeholders across various functions.</li> </ul>	1 day
<b>Assess current state of WFH</b> 1. Identify work units and roles working from home during the pandemic. 2. Assess the current state of WFH for each applicable work unit.	<ul style="list-style-type: none"> <li>Planning committee</li> <li>Work unit leaders</li> </ul>	<ul style="list-style-type: none"> <li>Share knowledge of different work units.</li> <li>Collect and document the information.</li> </ul>	2-3 days
<b>Evaluate WFH suitability and plan to track success</b> 1. Determine the suitability of each work unit to WFH. 2. Determine program goals and metrics to track success.	<ul style="list-style-type: none"> <li>Planning committee</li> </ul>	<ul style="list-style-type: none"> <li>Facilitate the discussion.</li> <li>Ensure goals are aligned with organizational priorities and desired outcomes.</li> </ul>	3-4 days

# Use the *Sustained WFH Workbook* to document decisions throughout this blueprint

Use the [\*Sustained WFH Workbook\*](#) through steps 1 to 3 to:

1

- Record planning committee members
- Document the work units and roles currently working from home
- Assess the current state of WFH for each work unit and determine suitability to sustain WFH long term
- Record program goals and metrics

2

- Record selected WFH option(s)

3

- Document program parameters at the organizational and work unit level
- Document the required resources, support, and program changes needed to enable the WFH program

The image shows a screenshot of the 'Sustained WFH Workbook' template. The top section is titled 'Work Unit WFH Suitability Assessment' and includes instructions on how to use the tab to assess the suitability of work units currently working from home. Below this, the 'McLEAN & COMPANY' logo is visible. The main title 'Sustained WFH Workbook' is prominently displayed. A detailed description of the tool's purpose follows, stating it is designed to accompany the Sustain Work from Home in the New Normal blueprint. Below the description, a list of tabs is provided, each with a brief description of its function: Tab 2. Planning Committee, Tab 3. Current State, Tab 4. Work Unit WFH Assessment, Tab 5. Goals & Metrics, Tab 6. Selected WFH Option(s), Tab 7. Program Parameters, and Tab 8. Program Enablement. At the bottom, a disclaimer states that the template is for general information only and should not be used as a substitute for professional advice.

**Work Unit WFH Suitability Assessment**

Use this tab to assess the suitability of work units currently working from home to continue to do so beyond emergency WFH.

The "work unit" column will self-populate based on the work units that were input on the previous tab as currently working from home. For each work unit, select ratings for the capability ratings selected, the work unit's WFH suitability will be automatically generated. Use the filter in the WFH Suitability column to organize work units based on their level of suitability.

**Note:** If a capability has been rated "not at all" re-examine if WFH is still feasible, regardless of the generated WFH suitability.

**McLEAN & COMPANY**

**Sustained WFH Workbook**

This tool is designed to accompany the Sustain Work from Home in the New Normal blueprint. Use this workbook to document key information and decisions while completing the blueprint.

**Tab 2. Planning Committee:** Record the members of the planning committee.

**Tab 3. Current State:** Document the current state of WFH at the organization and the unique experience of each work unit that is currently working from home.

**Tab 4. Work Unit WFH Assessment:** Determine the suitability of work units for sustained WFH.

**Tab 5. Goals & Metrics:** Record the goals and metrics to measure the success of the WFH program.

**Tab 6. Selected WFH Option(s):** Record work units that will be part of the WFH program and the associated WFH option chosen for them.

**Tab 7. Program Parameters:** Set standard program parameters at the organizational level and variations in parameters at the work unit level to create a framework for the WFH program.

**Tab 8. Program Enablement:** Document the required resources, support, and program changes required to enable the WFH program.

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# Involve key stakeholders in the planning committee

This collaborative and cross-functional committee has a long-term planning horizon and is responsible for determining how to sustain WFH during the crisis and beyond.



This committee can be the same as the planning committee for [Bring Employees Back to the Workplace Amid the COVID-19 Pandemic](#) or consist of some of the same members.

## Include representation from:

1. Human Resources (representation across HR functions and HRBPs)
2. Executive leadership team
3. Functional leaders of groups currently working from home
4. Business Continuity Planning
5. Health & Safety
6. IT (critical since WFH options are typically technology-enabled)
7. Legal
8. Risk Management
9. Communications
10. Change Management (if separate from HR)
11. Labor relations and union representatives (if applicable)



Document the planning committee on tab 2 of the [Sustained WFH Workbook](#).

## The WFH program needs to work for everyone involved. Additionally, you will need to consult:

1. Senior leaders for insight into their functions/departments or units
2. Employees for their feedback and preferences
3. Finance for budgets and expenses related to WFH programs
4. Facilities Management for WFH options where some onsite work is required
5. External partners (e.g. suppliers, vendors, outsourcing partners, contractors)

## McLean & Company Insight

Avoid the common pitfall of people assuming their perspective is the only way of thinking by creating a strategic planning team with **representation from different backgrounds** and experience levels. **This provides diverse perspectives to reframe traditional ways of thinking about work-from-home practices.**

# Identify work units working from home during the pandemic



You will need (if available):

- Return to the workplace (RTW) plan
- Workforce redeployment plan
- Emergency WFH plan
- COVID-19 protocols
- Business continuity plan



Refer to the organization's RTW plan to understand the public health requirements for each work unit. Throughout this blueprint, refer to these requirements to understand which WFH options would be realistic for the organization to offer, in terms of logistics, costs, and compliance.

1

**Determine all work units currently working remotely.** Use your RTW plan, if available, to help identify these work units. For guidance on how to identify work units, see McLean & Company's [Bring Employees Back to the Workplace Amid the COVID-19 Pandemic](#) blueprint.

A **work unit** is a functional group or division that is responsible for a discrete set of processes or capabilities (e.g. Total Rewards team). See example in [Appendix I](#).

2

**Next, identify any work units that are onsite that have some roles currently working remotely.** Refer to the emergency WFH plan to identify these roles.

- If these roles typically operate in different onsite locations (with different work environment conditions and COVID-19-related restrictions and protocols in place), identify based on role and location (e.g. Total Rewards specialists in Toronto location and Total Rewards specialists in New York location).

These roles will be **assessed in step 3** based on WFH program parameters and employee eligibility



Redeployments, upskilling, or layoffs may be necessary for roles that continue to experience decreased demand. See McLean & Company's [Streamline Your Workforce During a Pandemic](#) blueprint.

# Create a list of work units currently working from home during the pandemic

**Document all work units currently working from home, as well as roles (if entire work unit is not working from home) during the pandemic. This includes:**

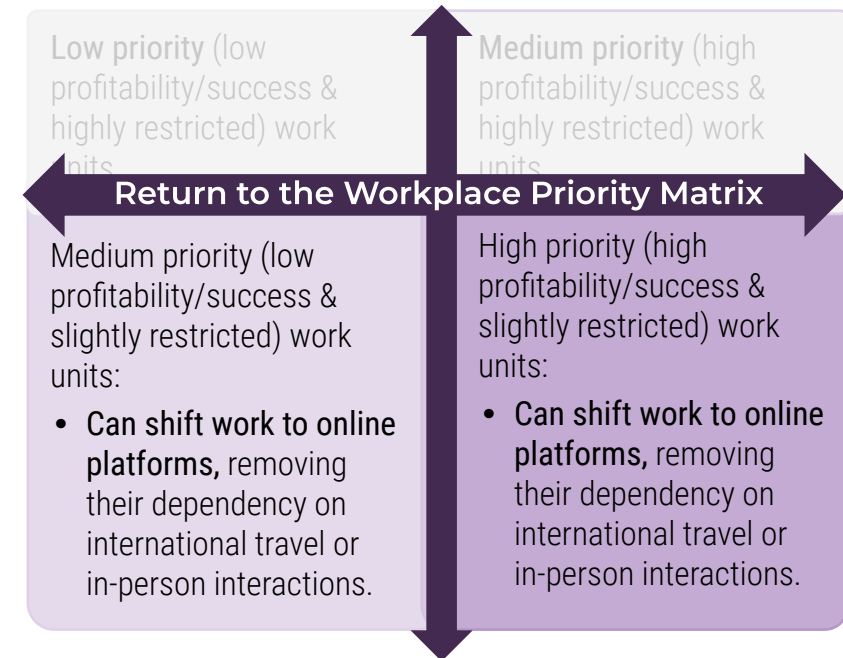
- All roles deemed **eligible** to WFH in the emergency WFH Plan.
- Work units **not prioritized** to return to the workplace in the RTW plan.
- Work units **prioritized to return to the workplace** that were assessed as having the ability to shift work to online platforms.



**Don't forget about redeployed employees.** If employees were redeployed in response to COVID-19, determine if they will be included in the WFH program or if they are able to return to their original role.

## McLean & Company Insight

Many organizations that were previously resistant were pushed into a WFH experiment almost overnight. While the immediate response required speed, it also provided a rare opportunity to learn from the experience and define an informed, sustainable, and better path forward.



Document this information on tab 3 of the [\*Sustained WFH Workbook\*](#).

# Assess the current state of WFH for each applicable work unit

Uncover the current state of WFH at the organization and the unique experience of each work unit (or role where applicable) to inform how to support WFH going forward:



Document on tab 3 of the [Sustained WFH Workbook](#).

	Stakeholders involved:	Collected from:	Discuss and record:
<b>Organizational information</b>	Planning committee and executive leadership	<ul style="list-style-type: none"> <li>Strategic documents, flexible talent strategy (if used)</li> <li>BCP, redeployment plans, etc.</li> <li>Compliance requirements (e.g. jurisdictional, guidelines from local health authorities)</li> </ul>	<ul style="list-style-type: none"> <li>Organization wide-actions to enable WFH (e.g. conversion of processes to digital, technology implementation)</li> <li>Added or changed HR programs (e.g. employee assistance programs, performance management) and policies (e.g. childcare, sick leave)</li> <li>Alignment of actions with desired culture and values</li> </ul>
<b>Employee feedback</b> This feedback will be used on the next slide to assess each work unit's suitability to WFH, as well as to inform decisions when selecting the WFH options and parameters in steps 2 & 3.	Managers and employees in work units currently working from home during the pandemic	<ul style="list-style-type: none"> <li><b>Existing data sources</b> (e.g. town halls, surveys, meetings, check-ins, Pandemic Engagement Pulse Check, etc.)</li> <li><b>Surveys distributed to employees using questions in the <a href="#">Appendix</a> or focus groups</b></li> </ul>	<b>Focus feedback on employees' experiences and challenges with the following:</b> <ul style="list-style-type: none"> <li>Work duties</li> <li>Operating processes and procedures</li> <li>Achieving operational outcomes</li> <li>Technology usage and effectiveness</li> <li>Changes required in processes, programs, and policies</li> <li>Collaboration and communication</li> <li>Team dynamics and relationships</li> <li>Individual experience and engagement</li> <li>Mid-term concerns regarding work environment (e.g. health risk, childcare, transportation)</li> </ul>

# Determine the suitability of each work unit to WFH

**Based on the feedback and data gathered, the planning committee works with leads to evaluate how suitable each work unit is to WFH in tab 4 of *Sustained WFH Workbook*.**

	Work duties	Processes	Operational Outcomes
<b>Highly suitable for most WFH options</b>	<ul style="list-style-type: none"><li>• Low dependence on onsite equipment</li><li>• Work easily shifts to online platforms</li><li>• Low dependence on onsite external interactions (e.g. clients, customers, vendors)</li><li>• Low interdependence of work duties internally (most work is independent)</li></ul>	<ul style="list-style-type: none"><li>• Work processes and expectations are or can be formally documented</li><li>• Current work processes (while working from home) are sustainable long term</li></ul>	Most or all operational outcomes can be achieved offsite (e.g. products/service delivery not impacted by WFH)
<b>Suitable for some WFH options</b>	<ul style="list-style-type: none"><li>• Some dependence on onsite equipment</li><li>• Some work can shift to online platforms</li><li>• Some dependence on onsite external interactions</li><li>• Some interdependence of work duties internally (collaboration is critical)</li></ul>	<ul style="list-style-type: none"><li>• Most work processes and expectations have been or can be formally documented</li><li>• Most current processes are sustainable (e.g. workarounds don't add work, can be supported)</li></ul>	Some operational outcomes can be achieved offsite (e.g. some impact of WFH on product/service delivery)
<b>Least suitable for WFH options</b>	<ul style="list-style-type: none"><li>• High dependence on onsite equipment</li><li>• Work cannot shift to online platforms</li><li>• High dependence on onsite external interactions</li><li>• High interdependence of work duties internally (e.g. line work)</li></ul>	<ul style="list-style-type: none"><li>• Few work processes and expectations can be formally documented</li><li>• Current processes and workarounds are not sustainable long term</li></ul>	Operational outcomes cannot be achieved offsite (e.g. significant impairment to product/service delivery)

# Determine program goals and metrics to track success

**Define 3-5 goals based on the organization's priorities and desired outcomes in sustaining WFH in the mid and long term.**

**These goals will inform the program's design and the rationale that will be communicated to leaders and employees.**

Sample mid-term goals for the duration of the pandemic:

1. Protect employee health and safety through physical distancing until vaccine is available.
2. Improve wellness by ensuring WFH options are available to all employees.
3. Reduce costs of implementing onsite COVID-19 protocols.

Sample goals for the WFH program in the long term:

1. Decrease operating costs (e.g. reduce/eliminate real estate in current locations).
2. Increase employee engagement through improved work-life balance.
3. Improve EVP and talent attraction.
4. Decrease voluntary turnover.

## McLean & Company Insight

A common goal and experienced benefit of WFH programs is increased productivity. However, the current pandemic is surrounded by complex emotions (uncertainty, fear, grief) and an unprecedented blend of personal and professional lives. The expectation of increased productivity is unrealistic, and it should not be used to rationalize working from home for the duration of the pandemic.



If guiding principles were defined in the talent strategy, use them to define goals and inform decisions (e.g. employee safety comes first).

**Identify metrics to track progress against goals and inform changes in future iterations of the program.**

Select low-effort options to evaluate progress in the mid-term:

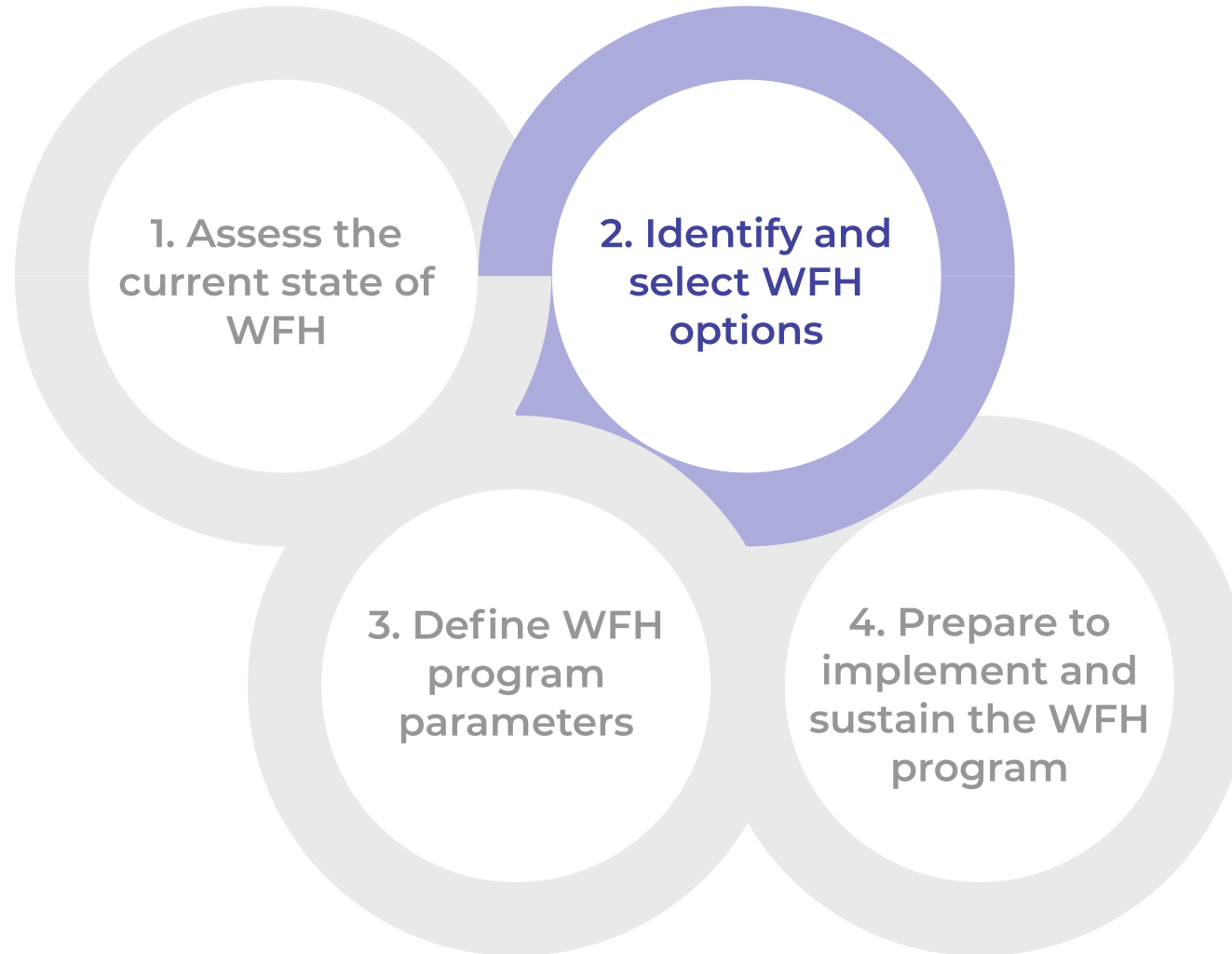
- Qualitative feedback (e.g. check-ins, open-ended comments)
- Scores on "This organization's actions support the health and wellbeing of its employees" in the [Pandemic Engagement Pulse Check](#)
- Estimated cost savings (e.g. implementing protocols, equipment, Sample metrics. See [HR Metrics Library](#) for more.

- Cost savings (due to reduction/elimination of office space)
- Increased overall engagement scores on work-life balance driver
- Comments referring to "flexible work" in the [New Hire Survey](#)
- Improvement in retention rates



Document goals and metrics on tab 5 of the [Sustained WFH Workbook](#).

## Step 2: Identify and select WFH options



# Step 2 Summary

Activities	Who's Involved	HR's Role	Timeline
<b>Select the appropriate WFH option(s)</b> <ol style="list-style-type: none"> <li>1. Review the different WFH options.</li> <li>2. Choose the WFH option for each work unit that best aligns with the organizational context.</li> </ol>	<ul style="list-style-type: none"> <li>• Planning committee</li> <li>• Senior leaders</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitate the discussion.</li> <li>• Share knowledge of different work units.</li> </ul>	1-2 days
<b>Fine-tune and confirm the choice</b> <ol style="list-style-type: none"> <li>1. Ensure consistency where possible by consolidating varied WFH options across work units.</li> <li>2. Solicit feedback to validate the choice of the selected WFH options from employees and leaders.</li> </ol>	<ul style="list-style-type: none"> <li>• Planning committee</li> <li>• Work unit leaders</li> <li>• Employees</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitate the discussion.</li> <li>• Collect feedback from employees and leaders on selected WFH options.</li> </ul>	1 week

# Review the different WFH options

Choosing the right WFH option is entirely dependent on your organizational context. The following slides will take you through the benefits, cautions, and use cases of each WFH option for a work unit. As you are going through the slides, keep the results of your current state assessment front of mind and envision whether it would be realistic to implement the WFH option for each work unit.

## Full WFH

*All employees, all the time*

- **All employees** within a work unit WFH permanently.

1

## Hybrid WFH team

*Some employees, all the time*

- **Eligible employees** WFH on a full-time basis.

2

## Balanced WFH team

*All employees, some of the time*

- **All employees** within a work unit can WFH for a **certain portion** of their work week.

4

## Partial WFH team

*Some employees, some of the time*

- **Eligible employees** within a work unit can WFH for a **certain portion** of their work week.

3



For some organizations, a **single WFH option** may seem immediately **appropriate** across the whole organization. Although having **one WFH option has many benefits**, such as easier coordination and a perception of fairness, organizations must **still assess the WFH option for each work unit** to avoid any oversights.

## McLean & Company Insight

Don't get stuck in thinking that WFH options are only available to knowledge workers. Technology developments have enabled more flexibility in WFH options for less traditional applications.

# Decide if a full WFH option is appropriate



**Full WFH** describes a program where all employees within a work unit, or the whole organization, WFH permanently.

At Organization A, the entire sales team **works from home within the same geographical location** to ensure synchronous communication is available. **Weekly team video conferences** and **quarterly in-person company meetings** help create a sense of belonging to the organization. As well, **annual employee retreats** help build **coworker relationships**.

Employees are given a **yearly budget** to set up their workspaces at home and expense work supplies such as pens, paper, and printer ink.



## Benefits

- **Reduces/eliminates real estate and utilities costs** based on the need for fewer or no desks/workspace.
- Improves performance for employees who work better outside of a traditional office setting.
- Reduces/eliminates commuting time for employees.
- **Increases career opportunities** for diverse talent, such as individuals with family care responsibilities and people with disabilities who have difficulty commuting to or working in an onsite workspace.
- **Improves talent attraction** with expanded talent pools to source from (e.g. diverse employees, millennials).
- Enables the **operational continuity** required if the pandemic follows an oscillating scenario.



## Cautions

- While communication technologies can help, employees may feel some degree of **social isolation**.
- Difficulty building **coworker relationships** and a **sense of belonging**, especially for new hires.
- **Expensive to implement technology** and train employees if it is not already in place.
- Employees lacking the workspace to WFH effectively (e.g. no space for a desk or office chair).
- Managers finding it **difficult to assess performance and potential**, impacting promotions.
- Some dissatisfaction among employees who prefer not to WFH permanently. If this option is pursued, make sure it aligns with work unit or the organizational culture and preferences.
- Performance management (PM) that is **highly subjective** and not based on measurable results.



## Sample use cases

- **Organizational functions can be performed** without an office or in-person interactions.
- Organization is **able to invest in technology** to support the remote operation of the organization.
- Organization is looking to **reduce or eliminate operational costs**, including real estate.

# Decide if a hybrid WFH option is appropriate



**Hybrid WFH** describes a program where **eligible employees** within a work unit or the organization WFH on a **full-time basis**.

At Organization B, most employees within the research team work onsite due to the many interdependencies of their work duties and to support the large amount of collaboration required within the work unit.

However, several employees have **significantly more independent work** and their roles typically require **less collaboration** with the rest of the team. These employees **WFH on a full-time basis**. No stipend for home office setup is provided to these employees, as it is understood during the recruitment process that the role will be remote and having a space to work is required.



## Benefits

- **Supports employees' preferences** for WFH opportunities by providing a formal WFH program without mandating it for the whole organization.
- **Increases career opportunities** for diverse talent, such as people with disabilities who have difficulty commuting to or working in an onsite workspace.



## Cautions

- **Inconsistent communication and knowledge sharing** between onsite and WFH employees.
- WFH employees **missed for career development opportunities** (promotions, stretch assignments, etc.).
- WFH employees having **difficulty building relationships** and **developing a sense of belonging** with the rest of the organization.
- Some employees becoming **envious** of others who are provided the opportunity to WFH, especially during the pandemic when people may feel uncomfortable returning to work. To avoid this, organizations must clearly communicate the rationale behind eligibility.



## Sample use cases

- Organizations in which **some employees within work units are able to WFH** full time but not all.
- Organizations **interested in eventually offering full WFH** but want to pilot it on a small scale first.
- Organizations who have many roles that are hard to fill due to specific skill sets and need to be able to **broaden their talent pool**.
- Organizations who want/need to bring some of their employees back to work during the pandemic but require other employees to continue to WFH in order to comply with public health and government regulations, such as physical distancing requirements.

# Decide if a partial WFH option is appropriate



**Partial WFH** describes a program where **eligible employees within work units** can WFH for a **certain portion of their work week**. This work option requires organizations to clearly decide who is eligible and how frequently employees can WFH in a week.

At Organization C, eligible employees within the Marketing Team are given the **option to WFH up to two days per week**. Eligible employees are defined by their tenure, with the requirement that they have been in the position for **at least six months**.

The team leader allows employees to select the days they will WFH provided there are no important meetings or other responsibilities that require them to be onsite that day.



Partial WFH may not always be presented as an option for employees but rather mandated by the organization. For example, during the COVID-19 pandemic, organizations may need to determine who works from home and when in order to align with physical distancing requirements.



## Benefits

- Provides the **greatest amount of customization** to determine which employees WFH and how often.
- **Supports the preferences of employees** by providing a formal WFH program while still maintaining in-person work interactions.
- Potential **cost savings** due to a decreased need of onsite workspace.
- Improves **ability to build networks** and **develop work relationships** by providing employees with some onsite, in-person interactions.



## Cautions

- Feelings in **unequal treatment** among employees if different work units are given different WFH options. Provide clear rationale for these differences to minimize this potential concern.
- More **complex to manage and maintain** due to the increased flexibility of program parameters. This invites more opinions into the decision-making process, making it harder to reach a decision.
- More **complex to implement** as organizations must alter programs to support employees working both onsite and from home.
- If real estate is reduced, hoteling for employees will have to be implemented, which has upfront costs and may result in backlash from employees who want their own working space.



## Sample use cases

- Organizations who want to **maintain some onsite presence** while recognizing that their emergency shift to WFH during the pandemic may have adjusted their employees' desires for more WFH opportunities.
- Organizations interested in **eventually offering full WFH** that want to pilot it on a small scale first.
- Organizations looking to **improve their attraction, retention, and employee engagement** rates.
- Organizations where **physical distancing guidelines** or reduced real estate requires staggering of employees in the workplace. This is especially useful if the days specific employees can come into the office are regulated.

# Decide if a balanced WFH option is appropriate



**Balanced WFH** describes a program where **all employees within a work unit** can WFH for a **certain portion of their work week**.

This WFH option requires organizations to determine the amount of time employees are able to WFH (e.g. one specified day of the week, two times a week without specified days, etc.)

At Organization D, all employees within the Sales Team are encouraged to WFH **as many days of the week as they choose**, with the option to work from one of the organization's offices when they want. This **meets the preferences of all employees**, regardless of where they like to work.

Furthermore, the team has monthly meetings that employees are encouraged to attend in the office and mandatory in-person quarterly meetings. These meetings help ensure **that in-person connections are maintained** among all employees on the team.



## Benefits

- Provides the benefit of WFH to all employees in some form which helps manage the **perceived fairness** of WFH options by employees.
- **Supports the preference** of employees by providing a formal WFH program while still maintaining in-person interactions.
- **Reduces costs** as less real estate is required.
- **Easier for leaders to manage** as it applies to all employees rather than some.
- **Easy to revert to full WFH** should lockdowns be reinstated.



## Cautions

- **Not all job functions will be conducive to WFH.** When selecting this option make sure you have carefully examined each work unit's feasibility to WFH.
- If real estate is reduced, hoteling for employees will have to be implemented, which has its own upfront costs and may result in backlash from employees who want their own working space.
- If implemented to meet physical distancing guidelines, **significant coordination and planning is required.**



## Sample use cases

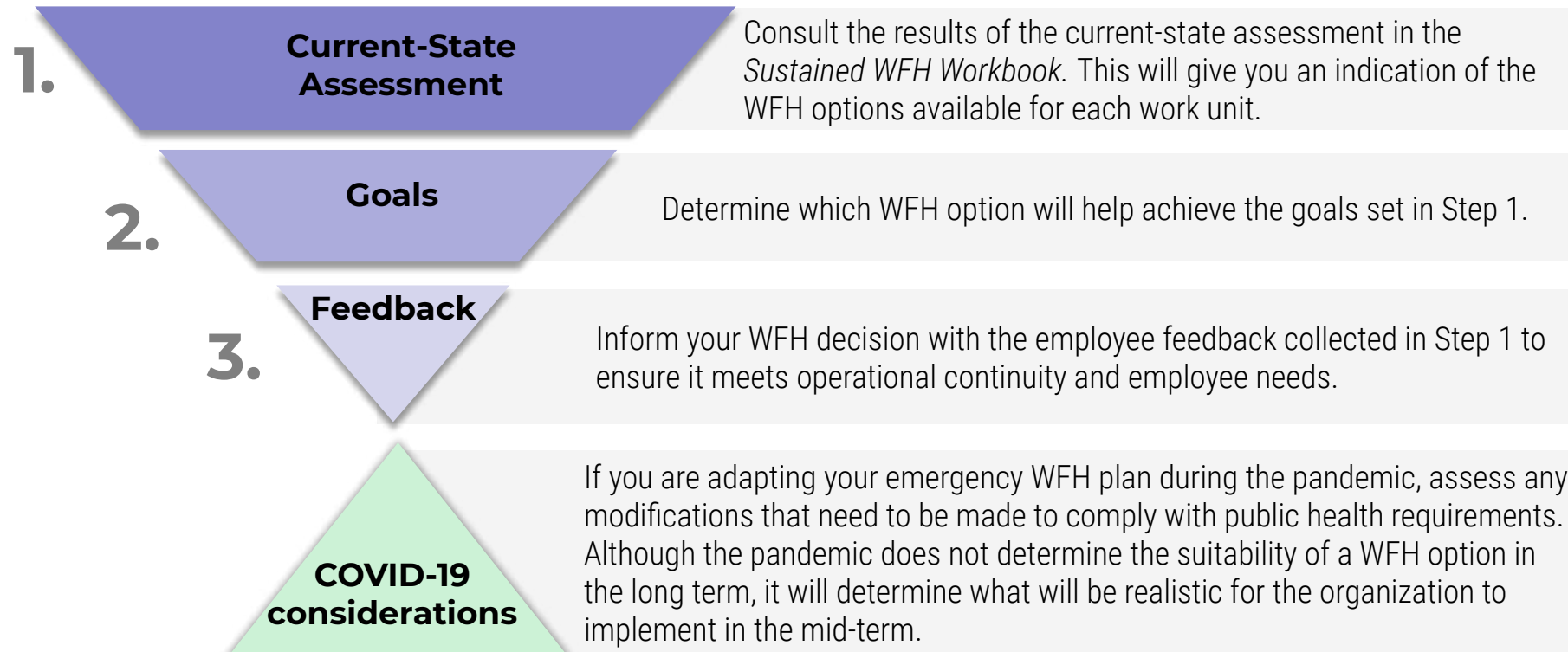
- Organizations who have determined that **whole work units are able to WFH** to some extent without significant barriers.
- Organizations who need to **reduce operation costs** but still want to maintain some form of in-person interaction and recognition of employee work preferences.
- Organizations looking to **improve their attraction, retention, and employee engagement** rates.
- Organizations trying to stagger employees in the workplace to **comply with physical distancing guidelines**. This is especially useful if the WFH option regulates the days when specific employees can work onsite.

# Choose the WFH option for each work unit that best aligns with the organizational context

HR and senior leaders must determine the most appropriate WFH option for each work unit by reviewing the following three sources of information:



Document selected WFH option on tab 6 of the [\*Sustained WFH Workbook\*](#).



During the pandemic, senior leaders must take a prescriptive approach by choosing the WFH options available for work units. This helps manage the flow of employees required to maintain physical distancing guidelines. However, post-pandemic, managers may be more involved in program decisions.

Based on this information, **determine the WFH option appropriate for each work unit.** At this point, assess whether the same WFH option can be offered across the organization.

# Ensure consistency where possible by consolidating varied WFH options across work units



## Benefits of consolidating WFH options

- Mitigate subjective decision making and perceptions of unfairness.
- Maintain a **unified** organizational culture and approach.
- Reduce program management burdens of coordinating the parameters of multiple WFH programs including associated policies, procedures, and administrative requirements.



This refers to options chosen (e.g. balanced WFH), not variation in how they will be applied to each unit (e.g. which days). This will be defined in the next step.

## McLean & Company Insight

The best way to accommodate unavoidable variation in employee preferences and needs in a WFH program is to select the options that provide the greatest flexibility to employees while being feasible in the organizational context.

## To check for opportunities to minimize variation of options, review the following (based on your context and needs):



Identify which selected WFH option **provides the most flexibility** to employees to choose where they work and when they WFH.

- For example, the balanced WFH option provides the most flexibility to employees compared to the full remote option identified for some units



Determine why this option may not be **appropriate for other units**:

- Do any units vary significantly on the assessment criteria (e.g. dependence on onsite equipment or in-person interaction)?
- Do any units operate under different work environment conditions (e.g. locations with different COVID-19 protocols)?



If options need to vary across the organization, determine whether they can be consolidated across:

- Location



If necessary, update the WFH options on tab 6 of the [Sustained WFH Workbook](#).

# Solicit feedback to validate the choice of the selected WFH options from employees and leaders

Although not required, gathering feedback has **many benefits**, including:

- Revealing critical **insight into how employees need to be supported** to adopt this new program.
- **Empowering employees** by communicating that their voice and opinions are valued.
- **Encouraging transparency** in the decision-making process. During uncertain times, clear communication on any changes being made to employees' working conditions will be appreciated. Be clear about why the feedback is being collected and how it will inform decisions.
- Creating an opportunity for the organization to **customize the WFH program to employees' needs**, which will **encourage buy-in** during implementation.

It's important to be very **intentional about the questions asked in the feedback**, whether through **focus groups or a questionnaire**. This is an opportunity for employees not to accept or reject the selected WFH option but rather to provide insight into what they need to make this change successful and to feel supported through the transition.

Some **sample questions** include:

- Do you **anticipate any significant challenges** to completing your job responsibilities as a result of this WFH program?
- What **additional tools and resources** will you need to WFH effectively?

Gathering feedback for the selected WFH option **may not be appropriate for every organization**. Before collecting feedback, assess the following:

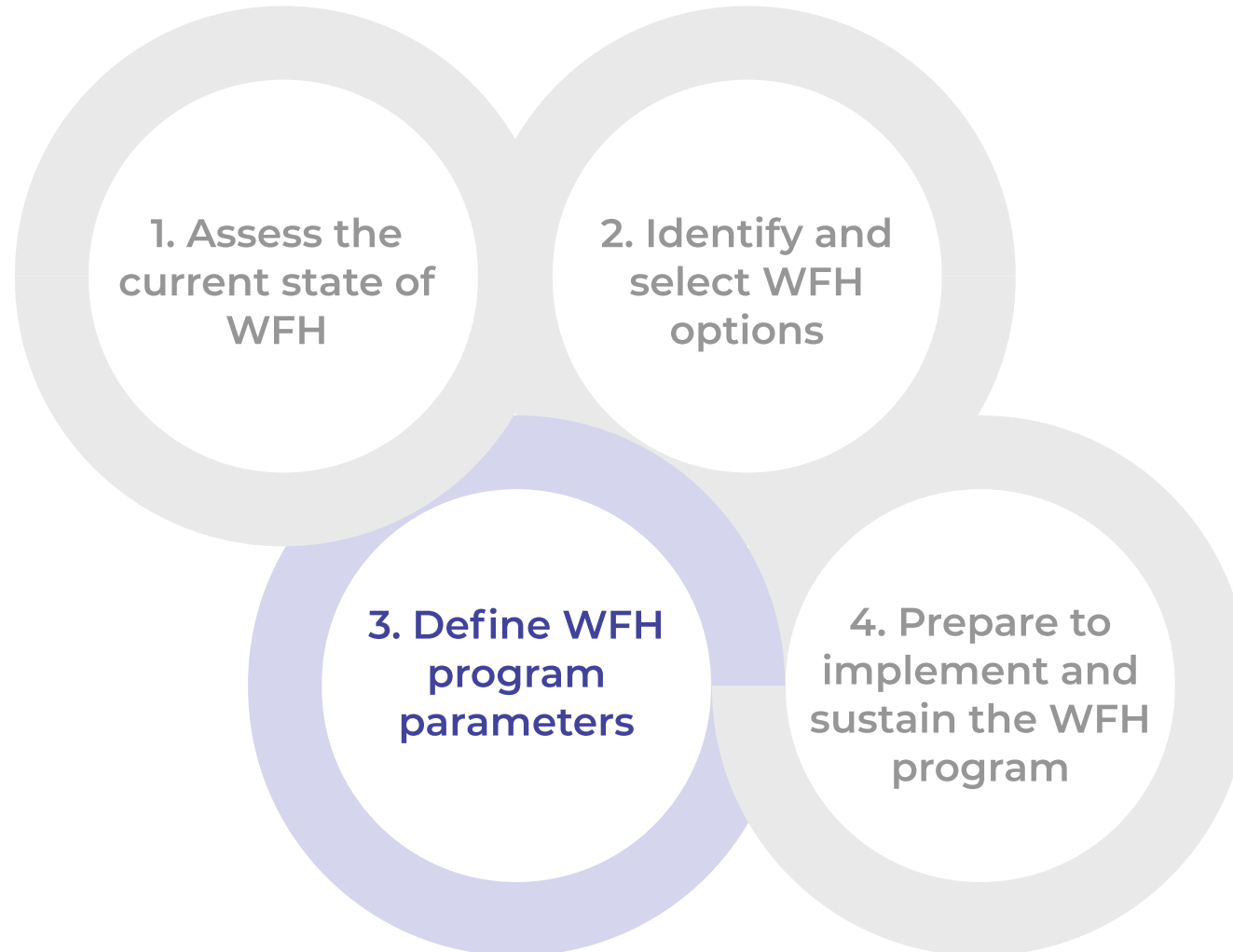
**Time constraints.** Some organizations may not have the luxury of time to gather and incorporate feedback before they must implement WFH programs. As well, **rushing through this feedback** may make the organization come across as insincere and **not truly caring about employee input**. **Be realistic** with what the organization can accomplish given time constraints. If needed, limit the feedback collected to managers to reduce the scope and, therefore, the time required to analyze the feedback.

**The organization's culture.** In order to receive meaningful feedback, **trust must exist between employees and senior leaders**. If this trust is lacking, more communication around anonymity and how the feedback will be incorporated may be necessary to encourage employee participation.

## McLean & Company Insight

While feedback is not gathered as final approval on WFH options from employees, **severe negative reaction** to the proposed programs is cause for concern. Dig into the root causes of such reaction and determine whether **more details on the program will address employee concerns** or if the **program needs to be modified**.

## Step 3: Define WFH program parameters






# Step 3 Summary

Activities	Who's Involved	HR's Role	Timeline
<b>Set the parameters of the WFH program</b> <ol style="list-style-type: none"> <li>1. Define employee eligibility parameters for the WFH program.</li> <li>2. Define time parameters for the WFH program.</li> </ol>	<ul style="list-style-type: none"> <li>• Planning committee</li> <li>• Work unit leaders</li> </ul>	<ul style="list-style-type: none"> <li>• Facilitate discussion and establishment of program parameters.</li> </ul>	3-4 days
<b>Develop and update policies</b> <ol style="list-style-type: none"> <li>1. Create a WFH policy outlining the program parameters.</li> <li>2. Update related guidelines and policies to support the WFH program.</li> </ol>	<ul style="list-style-type: none"> <li>• Planning committee</li> <li>• Legal counsel</li> <li>• Policy owners</li> </ul>	<ul style="list-style-type: none"> <li>• Develop WFH policy outlining the program parameters and relevant policy terms and guidelines.</li> <li>• Facilitate review of relevant guidelines and policies and incorporate any changes to HR policies.</li> </ul>	3-4 days
<b>Review supporting programs</b> <ol style="list-style-type: none"> <li>1. Determine the resources and support required to enable the program.</li> <li>2. Plan modifications to identified organizational programs.</li> </ol>	<ul style="list-style-type: none"> <li>• Planning committee</li> <li>• Program owners</li> </ul>	<ul style="list-style-type: none"> <li>• Review and update HR-related programs and help identify other organizational programs to be updated.</li> </ul>	3-4 days

# Set the program parameters of the selected WFH option(s) to create a framework for the program

The following slides are organized by parameter category (employee eligibility and timing). Define program parameters by addressing the decisions listed below, using the following slides for more guidance.

Relevant WFH Option	Parameter Category	Decision
 <b>Full WFH</b>	N/A	No parameter decisions required as all employees WFH all the time.
 <b>Hybrid WFH</b> <b>Partial WFH</b>	<b>Employee eligibility</b>	Which <b>employees</b> will be eligible for WFH?
 <b>Partial WFH</b> <b>Balanced WFH</b>	<b>Timing</b>	How much <b>time</b> must be spent onsite versus offsite?  Which <b>days</b> will be onsite versus offsite?

**Stakeholders involved:** Planning committee and work unit leaders will define parameters.

**Note:** Managers, employees, and HR will be responsible for applying and using WFH options within the provided parameters.

## McLean & Company Insight

Defining program parameters is necessary to ensure consistent application of key standards the organization wants to maintain. However, over-engineering the parameters can stifle flexibility and autonomy of managers and employees in their application.

**For each decision, set parameters at either or both of the following two levels:**



### Standard program parameters at the organizational level

- Standard parameters **apply across all work units** using the specified WFH option(s). *E.g. all employees must be onsite at least twice a week regardless of their work unit.*




### Variable parameters at the work unit or employee level

- Variable parameters are **set by leaders of work units** rather than being standard across the organization. *E.g. leaders of eligible work units are responsible for determining the amount of time spent onsite for employees within their work unit.*
- These variations will inform work unit level communications and guidelines provided to managers and employees within the units.




Document all parameters on tab 7 of the [Sustained WFH Workbook](#).

# Define employee eligibility parameters for WFH program

Related WFH options	Decision point	Critical considerations in selecting employee eligibility criteria
Partial WFH Hybrid WFH 	Which employees will be eligible for WFH?	<ul style="list-style-type: none"> <li>Employee eligibility is <b>defined by role</b> and, in some cases, individual criteria (see next slide for cautions).</li> <li>At minimum, you will <b>need to define employee eligibility</b> for these options <b>by work duties within the role</b>.</li> <li><b>Use the fewest number of employee eligibility criteria</b> possible to minimize restrictions on employee choice.</li> </ul>

Eligibility criteria	Applying the eligibility criteria	
<b>Work duties within roles</b> Employees in roles with duties more suitable to WFH are eligible.	<p><b>01</b> Document all roles within each work unit where the partial or hybrid WFH options apply. Look for:</p> <ul style="list-style-type: none"> <li>Work units with some roles that have returned to the workplace and some offsite (identified in Step 1).</li> </ul> <p><b>02</b> Determine each role's suitability to WFH based on work duties using parameters established by the organization or <b>McLean &amp; Company's suggested parameter considerations below</b>. Use information gathered in Step 1 and recorded data in the <i>Emergency WFH Assessment Tool</i>, if used.</p>	<p>This is the <b>only employee criteria that is mandatory</b>.</p> <p>It also mitigates decision-making biases.</p>

Standard parameter considerations	Variable parameter considerations	
<ul style="list-style-type: none"> <li>Dependence on onsite equipment</li> <li>Degree to which work duties can be completed with online platforms and/or technology (i.e. can work be carried out on portable technology? are there security concerns or logistical challenges?)</li> <li>Degree of <b>impact to external stakeholders</b> if this role is offsite</li> <li>Degree of <b>impact to internal stakeholders</b> if this role is offsite</li> </ul>	<ul style="list-style-type: none"> <li>Other criteria specific to the work unit (e.g. dependence on onsite paper-based documentation)</li> </ul>	<p>Take steps to ensure equitable treatment and inclusion of onsite employees and remote employees alike in work practices (e.g. collaboration) and programs (e.g. PM). See McLean &amp; Company's <a href="#">Ideas Catalog: Sustain Work-From-Home in the New Normal</a> for more information.</p> 

Related information continues on the following slide

# Use caution if defining additional eligibility criteria

The following employee eligibility criteria may be set as a standard parameter or as a work unit variation. Before implementing, however, review the cautions to fully understand the implications of adding the criteria to your WFH program.





Eligibility criteria		Cautions for using the criteria
ROLE	<b>Criticality of role</b> Critical roles are eligible as an attraction and retention tool	<ul style="list-style-type: none"><li>• Requires well-defined and unbiased critical role identification in the workforce plan</li><li>• If critical roles are leadership roles, increased divide between leaders and reports</li><li>• Employees in non-critical roles may be disengaged by perceived unfairness</li></ul>
	<b>Performance or productivity</b> Employees are eligible based on a performance threshold	<ul style="list-style-type: none"><li>• Appeals to leaders and organizations with a traditional mindset</li><li>• Requires well-defined, communicated, and developed PM practices</li><li>• Risks inconsistent and biased performance assessment and application</li><li>• Restricts WFH options for managers of poor performers</li></ul>
INDIVIDUAL	<b>Tenure</b> Eligibility is based on tenure in the role or organization	<ul style="list-style-type: none"><li>• New employees for socialization: often redundant unless team members are onsite</li><li>• Tenure in role: disincent and limits internal mobility</li><li>• Tenure in organization: can be a retention perk but may be perceived as unfair</li></ul>
	<b>Equipment/setup to WFH</b> Employees are eligible for WFH if they have a specific setup only (e.g. dedicated room)	<ul style="list-style-type: none"><li>• Use only minimum requirements that can be reimbursed (e.g. Wi-Fi)</li><li>• High risk of discriminatory application (e.g. socio-economic status), increased liability, and perceptions of unfairness</li><li>• May be restricted by jurisdictional legislation (e.g. requirements to cover expenses)</li></ul>



**Challenge the need** for these employee eligibility criteria, as they restrict choice and autonomy. They are often an excuse to avoid updating relevant programs or to maintain the status quo.

**Instead, partner with your employees by educating, supporting, and trusting them to self-select** if they are less productive or do not have the setup to WFH.

# Define time parameters for the WFH program

Related WFH options	Decision point	Sample considerations		Sample mid-term-only considerations
Balanced WFH   Partial WFH 	How much time must be spent onsite versus offsite?	Standard program parameters	Work unit variations	<ul style="list-style-type: none"> <li>Maximize time spent offsite due to increased risk of exposure associated with travel to site (e.g. public transportation) and being onsite (e.g. physical distancing, airflow).</li> </ul>
		Reduced <b>real estate capacity</b> (e.g. available space and equipment onsite will impact the extent to which employees can work onsite).	<b>Work duties for each work unit that require onsite presence</b> (e.g. dependence on onsite equipment, in-person interaction).	
Balanced WFH   Partial WFH 	Which days will be onsite versus offsite?	Common organization events	Common work unit events	<ul style="list-style-type: none"> <li>Protocols on reduced location capacity, health &amp; safety risks, and physical distancing that require employee presence onsite to be rotated.</li> <li>Degree of community impact, including infection rates and disruption to services.</li> </ul>
		(e.g. quarterly company meeting, biannual event) where all employees will be onsite post-pandemic.	that facilitate team dynamics, <b>interdependent duties</b> (e.g. weekly team meeting) or <b>external duties</b> (e.g. onsite delivery of client service) post-pandemic.	



**Consult with facilities to understand any space constraints that would impact the time parameters established.**

# Create a WFH policy outlining the program parameters



Use McLean & Company's [Work-From-Home \(WFH\) Policy](#) to record the WFH standard program parameters and relevant policy terms and guidelines. In addition, include information about decisions leaders must make regarding variations at the work unit level.

The policy outlines the purpose, scope, and policy statements relevant to the organization's WFH program.



If a balanced WFH option was chosen for all units in one location while a full remote option was chosen for another location due to different work environment conditions, create a separate policy outlining the program for each location.

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**Policy Statement**  
Describe the rules that govern the scope and complexity of the policy to your organization in the New Normal.

**WFH Options**  
[Organization's name]

Balanced WFH option  
Eligible employees include:  
• Research at [List Work Unit]  
• [List Work Unit]

Partial WFH Option  
Eligible employees include:  
• [List Work Unit]  
• [List Work Unit]  
• [List Work Unit]

All employees are required to maintain mandatory team meetings.

Not all work units are required to have face-to-face interaction.  
• [List Work Unit]  
• [List Work Unit]  
• [List Work Unit]

**Eligibility Criteria**  
Note that this policy is identified as a standard communicated by management.

**Employee eligibility**  
• Dependence on [List Work Unit]  
• Degree to which [List Work Unit]  
• Degree of interaction [List Work Unit]  
• Degree of [List Work Unit]

**Additional criteria for communicating any [List Work Unit]**

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**Work-From-Home (WFH) Policy**

**Introduction: How to Use This Policy Template**  
This customizable policy template allows you to set guidelines and the scope of the WFH program. To use this policy template, simply replace the text in dark grey with information customized to your organization. When complete, delete all introductory or example text and convert all remaining text to black prior to distribution.

Policy Title	Work-From-Home Policy
Policy Owner	Name the person/group responsible for this policy's management.
Policy Approver(s)	Name the person/group responsible for implementation approval of this policy.
Storage Location	Describe physical or digital location of copies of this policy.
Effective Date	List the date that this policy went into effect.
Next Review Date	List the date that this policy must undergo review and update.

**Purpose**  
Describe the factors or circumstances that mandate the existence of the policy. Also state the policy's basic objectives and what the policy is meant to achieve.

In the interest of providing employees with the benefits of more flexible work options, [Organization name] has implemented a work-from-home (WFH) program. All eligible employees are expected to employ the practice of working at home.

The WFH policy outlined in this document is subject to change.

**Scope**  
Define to whom and to what systems this policy applies. List the employees required to comply or simply indicate "all" if all must comply. Also indicate any exclusions or exceptions (e.g. those people, elements, or situations that are not covered by this policy or where special consideration may be made).

This policy applies to all regular [full-time and/or part-time] employees at [Organization name].

**Definitions**  
Define any key terms, acronyms, or concepts that will be used in the policy. A standard glossary approach is sufficient.

Work-from-home: Employees work within their homes rather than commuting to a central location for work.

Core Business Hours: Period during which all employees must be present at the workplace or their home office. Unless otherwise specified, core business hours at [Organization name] are [9am-5pm]. The standard work week is [40] hours.

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# Update related guidelines and policies to support the WFH program

## Communication guidelines

To ensure consistent information and knowledge transfer, update existing communication guidelines to ensure all employees understand communication best practices while WFH. See McLean & Company's [Virtual Communication Best Practices During COVID-19](#) research for more information.

## Health & safety policies

Determine the organization's liability for health & safety when employees WFH. Review the organization's liability policies to understand whether employees' homes are insured. Some employees may also be insured by their personal home insurance policy.

In addition, ergonomics policies must be updated to reference employees' new working spaces. For more information on ergonomic WFH spaces, see McLean & Company's [Ergonomic Workspaces Infographic](#).

If employee eligibility is influenced by health & safety requirements, update the organization's health & safety policy to document these details. See McLean & Company's [Health & Safety At Home Infographic](#) for more information.

## Expense policies

Determine if and what the organization will be reimbursing for a WFH setup and update expense policies accordingly. For more information on this, see the [Ideas Catalog: Sustain Work-From-Home in the New Normal](#).

**Update additional supporting policies** to align with the WFH program, such as:

- [Sick Days Policy](#)
- [Paid Time-Off Policy](#)
- [Child Care Policy](#)

Consult with the organization's legal counsel to ensure all necessary policies are updated with the required information to avoid any legal risks and ensure compliance (e.g. duty to accommodate for life circumstances such as health and risk status, dependent care, etc.).

# Determine the resources and support required to enable the program

Use the feedback gathered in steps 1 and 2 and the knowledge of leaders in the planning committee to determine the resources needed to support the WFH program and employees.


Coordination

What level of coordination is required to support the WFH program?

- The WFH option chosen, as well as the reasons it was chosen, will influence the level of coordination needed. For example, if the organization is reducing real estate, then coordination of hoteling and equipment/office sign-outs must be managed.
- Multiple WFH options for different work units will require significantly more coordination than a single WFH program organization-wide. Based on the organization's size, context, and current capacity, **a dedicated program coordinator and/or updates to HR technology may be required.** Alternatively, if capacity allows, these responsibilities can be added to an HR coordinator or HRBP.

**Coordination considerations in the mid-term**

In the mid-term, a **more coordinated approach from the organization and HR is recommended** to ensure COVID-19 protocols are followed, risks are mitigated, and the **safety of all employees is prioritized**. This includes the coordination of **scheduling** to accommodate reduced building capacity requirements, implementation of **physical distancing measures** in shared spaces, and **sanitization of equipment**. Refer to the protocols created in your RTW plan or see McLean & Company's [Idea Catalog: Bring Employees to the Workplace](#).

 Document the required resources and support on tab 8 of the [Sustained WFH Workbook](#).

Technology

What technology is required to support the WFH option(s)?

- Identify technology required to enable the WFH options (e.g. communication, work processes).
- Determine whether existing technology is currently meeting the needs or if additional technology will be required.

What are the data risks for the WFH option(s)?

- Assess whether the organization's data policy and technology covers employees working from home.
- If employees handle particularly sensitive data (e.g. personal employee information), consult relevant stakeholders to determine how data can be kept secure and identify any associated costs.

People

Do employees have the knowledge and skills for this WFH option?

- Identify any areas where employees will need training, such as learning new technology to enable virtual communication or improving manager capability around managing WFH employees. See McLean & Company's [Equip Managers to Effectively Manage Virtual Teams](#) for best practices in this area.

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# Plan modifications to identified organizational programs

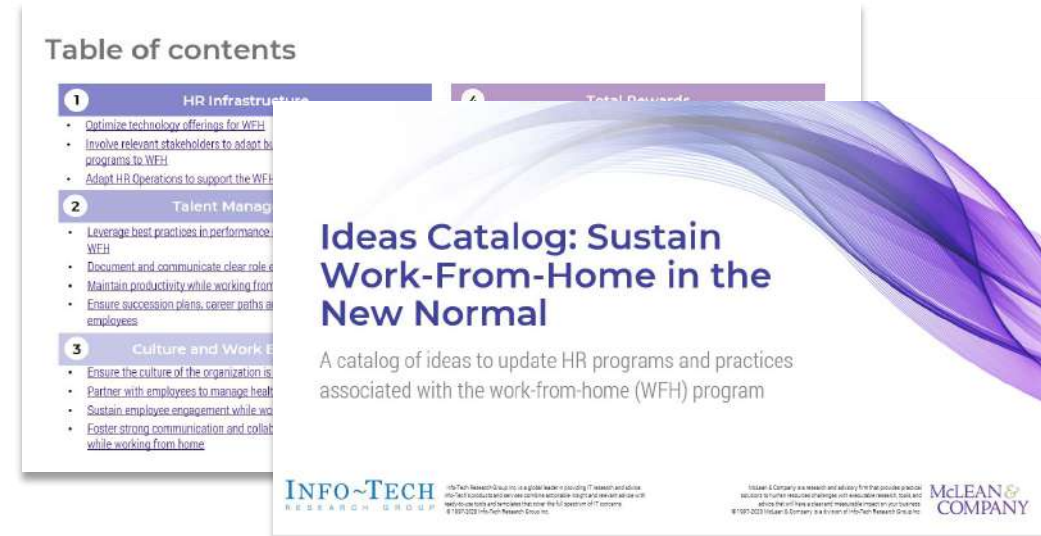
HR must update its **programs to reflect the organization's new WFH environment**. Use the [\*Ideas Catalog: Sustain Work-From-Home in the New Normal\*](#) to review some of the **changes** that need to be considered in the **following areas**:

- HR Infrastructure
- Talent Management
- Culture and Work environment
- Total Rewards
- Learning & Development
- Talent Acquisition

Ensure that **changes required to HR and non-HR programs** are identified and assigned to the appropriate owners as indicated by the planning committee.

- For example, if new technology needs to be implemented to support WFH programs, involve IT to manage those changes.

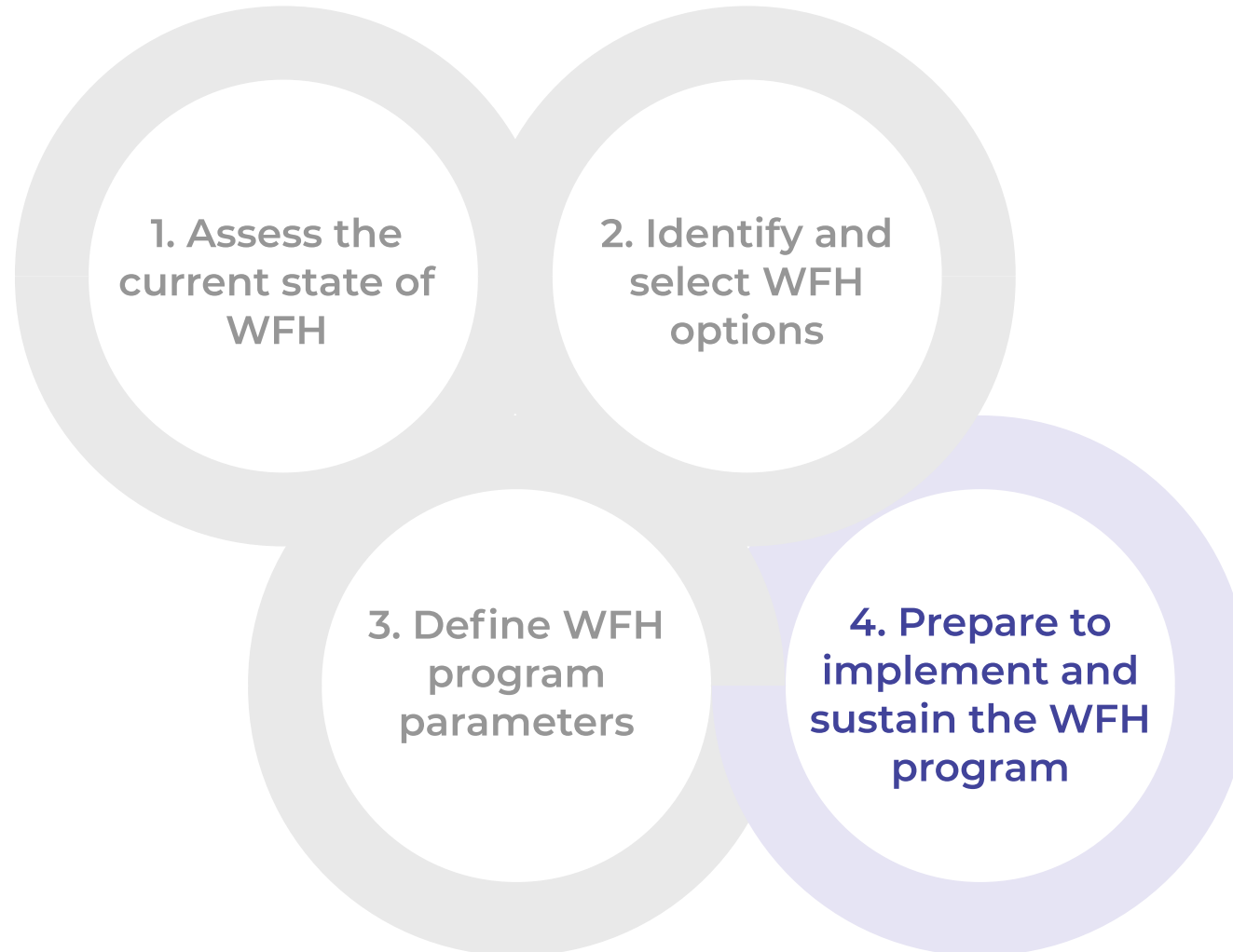
 Document all planned modifications on tab 8 of the [\*Sustained WFH Workbook\*](#).



**Keep track of the costs associated with these modifications.**

Although it is likely that a lot of major costs would have already been realized during the emergency WFH stage, senior leaders will want to be aware of any additional costs before approving the program in the following step.

# Step 4: Prepare to implement and sustain the WFH program



# Step 4 Summary

Activities	Who's Involved	HR's Role	Timeline
<b>Prepare for program rollout</b> <ol style="list-style-type: none"> <li>1. Solicit required approvals on the WFH program.</li> <li>2. Create a program rollout schedule.</li> </ol>	<ul style="list-style-type: none"> <li>• Planning committee</li> <li>• Executive leadership</li> </ul>	<ul style="list-style-type: none"> <li>• Gather information to present to the executive leadership to solicit required approvals.</li> <li>• Determine the schedule for operationalizing the new process.</li> </ul>	2-3 days
<b>Plan for change management and communication</b> <ol style="list-style-type: none"> <li>1. Use change management tactics to support the transition to the WFH program.</li> <li>2. Communicate the WFH program internally and externally.</li> </ol>	<ul style="list-style-type: none"> <li>• Planning committee</li> </ul>	<ul style="list-style-type: none"> <li>• Share knowledge on change management best practices and support transition until the change becomes “business as usual.”</li> <li>• Share knowledge and guidance on key messaging and communication best practices.</li> </ul>	Ongoing
<b>Continually iterate the program</b> <ol style="list-style-type: none"> <li>1. Evaluate and iterate the program on an ongoing basis.</li> </ol>	<ul style="list-style-type: none"> <li>• Planning committee</li> </ul>	<ul style="list-style-type: none"> <li>• Gather and act on metrics and feedback from employees working from home.</li> </ul>	Ongoing

# Solicit required approvals on the WFH program

Although there will be senior leadership representation in the planning committee, it is important to gain approval from the CEO and buy-in from the rest of the executive leadership team.

- 1 Present the rationale of shifting the organization's emergency WFH situation to a long-term program.**
  - Explain the benefits of working from home and the shift in employee preferences for more flexible work post-pandemic.
- 2 Outline the details of the WFH programs, including:**
  - The WFH options available for each work unit or the one WFH option available to the whole organization.
  - The standard program parameters determined by the planning committee and work unit leaders to be applied across the organization.
  - The variations of program parameters to be determined by work unit leaders.
- 3 Review any additional resources and costs:**
  - Outline changes required to policies, technology, resources, and HR and organizational programs to enable the WFH program and the costs associated with those changes.



# Create a program rollout schedule

## Pilot

Implement a pilot first to a few work units and then roll out the rest of the program after evaluating the pilot's success and addressing any issues. Depending on the WFH option selected, this could be rolling out different programs to different units or one program for the entire organization.

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The program can also be rolled out **in conjunction with the RTW plan**. In this case, follow the same phased approach of the RTW plan with the WFH program rollout.

2

## Full-scale rollout

After assessing any kinks in the program from the initial pilot, roll out the program to the remaining work units. For more information on evaluating and iterating the WFH program, continue working through this step.



If an organization is operating according to its emergency WFH plan, the pilot would include transitioning people to work onsite more than they were previously working (i.e. transitioning from full WFH to hybrid WFH).

# Use change management tactics to support the transition to the WFH program

## Gain leadership buy-in to the program by involving leaders wherever possible

- Include leaders in key decisions from the start to improve their engagement with the program and reduce resistance.
- Solicit their feedback on their expectations for the program and on what is or isn't working with existing WFH processes.

## Support managers as they lead their teams through the change

Strong leadership is key to ensure the program succeeds. Provide managers with the necessary context and training so that they are able to support their employees. This can include providing the following:

- Manager guide or handbook with documentation of important process changes and advice.
- Online training on managing through change and managing remote employees and their performance.
- Any additional support and resources to help them support their employees through the change and beyond it (e.g. FAQ document, monthly training).

“ If you don't plan, prepare, manage, and reinforce it, then things go awry. ”

– Erin O'Flynn, Head of HR, Ontario College of Pharmacists

## Do not expect a successful implementation overnight

- Even if emergency WFH was implemented due to the pandemic, the shift to a permanent program is a big change. Allow time for employees to adjust to the changes and ensure there are channels open for them to voice any concerns throughout the implementation.

## Establish a strong communication plan using communication best practices

- Communicate in a **timely manner**, providing substantial warning before the implementation of any changes and sharing updates shortly after decisions are made.
- Establish a set of key messages that will guide all project communications to present a **consistent, unified, and straightforward message**.
- Use **two-way communication** by incorporating feedback loops and soliciting stakeholder feedback on the change.
- Ensure communications are **transparent, accurate, and empathetic**.

See the next slide for advice on the content of the communications

# Communicate the WFH program internally and externally

1

## Communicate to managers

- The WFH option available to their work units
- The standard program parameters across the organization
- The variations in program parameters that impact their work units



See Info-Tech's [Internal Communications Plan](#) for additional advice on internal communications.



Document the communication plan in tab 4 of McLean & Company's [HR Action and Communication Plan](#).

## External communications

Determine whether customers, vendors, and suppliers need to be informed about the WFH program.

2

## Communicate to the organization

After program parameters have been determined by managers, communicate the WFH program to the organization through a **town hall**. Have the **CEO** or another senior leader explain:

- **Program purpose:** Explain the high-level purpose of the program, including why the program is needed and why now. E.g. the emergency WFH program highlighted the benefits of remote work to the organization and employees, indicating a need to implement a longer-term program.
- **Business rationale for the program:** share the benefits of working from home and the program goals identified in Step 1.
- **WFH option selection process:** Be transparent about the process followed to select the WFH options and program parameters available for work units. This is especially important if WFH options differ between work units.
- **WFH option and eligibility:** Explain the WFH options available for work units and the program parameters (including any eligibility criteria selected and the amount of time available to WFH).
- **Approval not guaranteed:** Explain that WFH is not guaranteed and that it will differ according to each employee's role or other relevant objective criteria.
- **Shared responsibility:** Highlight the importance of everyone working together to make the program a success.
- **Next steps:** Share next steps and how employees gather information on the WFH options available to them (i.e. through managers, especially if there are variations in work units, or an organizational database). Also refer employees to any resources available on WFH best practices.
- **Ongoing communications:** Provide employees with continuous communications about any changes to the program through mediums such as a town hall meeting, emails, or online or paper postings.

# Evaluate and iterate the program on an ongoing basis

01

## **Continually monitor the results of project metrics.**

- Track progress toward goals and metrics set at the beginning of the project to gauge the success of the program.
- Analyze metrics at the work-unit level to highlight successes and challenges in the WFH option and the parameters around it for each impacted unit.

02

## **Regularly gather feedback on program effectiveness using questions such as:**

- Has the desired culture been effectively communicated and leveraged, or has the culture changed?
- Is productivity or collaboration being impacted? (Negatively or positively?)
- Are employees satisfied overall with the program? E.g. is it fair, are they supported, do they feel isolated?
- Are there particular work units that are struggling more than others? E.g. do they have the tools to do their job, is team communication effective?

Collect feedback through regular channels (e.g. manager check-ins) and set up a cadence to survey employees on the program (e.g. three months after rollout and then annually).

03

## **Determine if changes to the program or its parameters are needed (organizationally or at the work-unit level).**

- Revisit the selected WFH option and the parameters discussed in this blueprint. If a significant number of the cautions under the WFH option are being experienced, it may be necessary to select a different option or adjust the parameters to mitigate the common challenges.

04

## **Assess if additional work units should be considered for sustained WFH.**

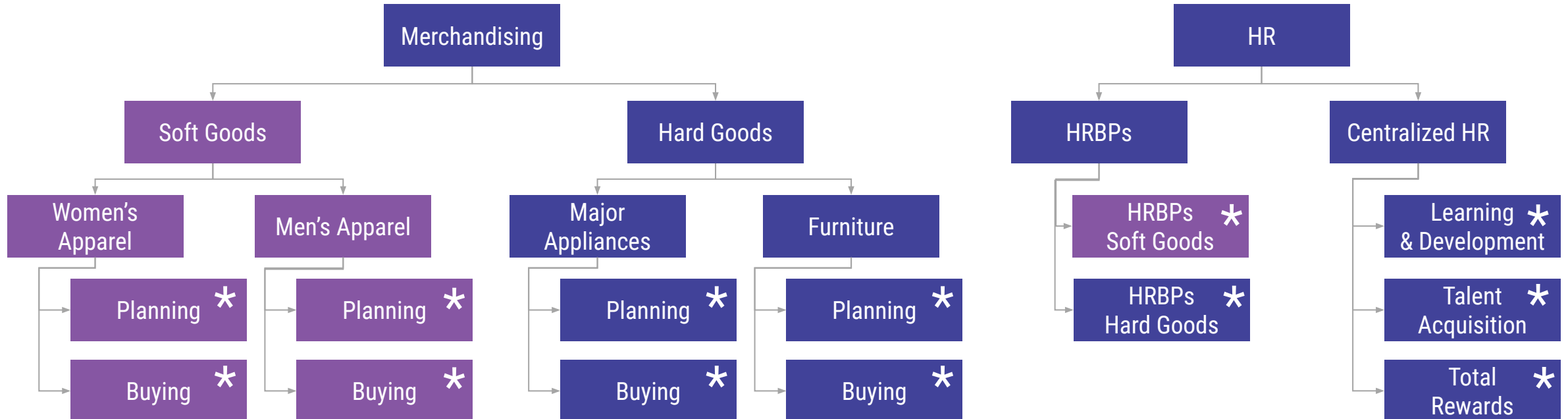
- Are there additional work units that were able to WFH during the pandemic but have since returned to the workplace?
- Are there any work units that never moved to WFH but could once the appropriate infrastructure is put in place?

### **McLean & Company Insight**

It doesn't have to take a pandemic to transform mindsets. Continue to challenge assumptions around who can WFH and the amount of flexibility provided to them with every iteration of the program.

# Appendix I: Example Work units

This example is based on a fictitious retail organization that appears in [Bring Employees Back to the Workplace Amid the COVID-19 Pandemic](#). The organizational charts for the Merchandising and HR departments are shown below. Work units are denoted by a “\*”. When the *soft goods division* (light purple boxes) returned to the workplace, so did the HRBPs dedicated to the soft goods division. However, the HRBPs supporting the hard goods division, which has not yet returned, are currently working from home and will be assessed for suitability for sustained WFH.



# Appendix II: Sample survey questions

1

What do/did you like the most about working from home? What do/did you like the least?

2

Has it been more or less challenging to complete your work duties while working from home?

3

Are the operating processes and procedures clear and simple to navigate?

4

Have you been able to achieve your goals while working from home? Why or why not?

5

Do you have all the technology required to do your job effectively from home?

6

Are there any processes, programs, and/or policies preventing you from working effectively?

7

Do you think collaboration levels have remained the same since moving to WFH?

8

How has the frequency and clarity of communications, both formal (e.g. organizational announcements) and informal (e.g. instant messaging with team members), impacted your ability to perform in your role? How has it impacted your feelings of connectedness?

9

Has there been a change in team dynamics and/or relationships?

10

How have your engagement levels been while working from home? If they have changed (positively or negatively) was it a direct result of working from home?

11

What challenges have you experienced with your current work environment?

# Key insights

## Insight 1

Many organizations that were previously resistant were pushed into a WFH experiment almost overnight. While the immediate response required speed, it also provided a rare opportunity to learn from the experience and define an informed, sustainable, and better path forward.

## Insight 2

The best way to accommodate unavoidable variation in employee preferences and needs in a WFH program is to select the options that provide the greatest flexibility to employees while being feasible in the organizational context.

## Insight 3

It doesn't have to take a pandemic to transform mindsets. Continue to challenge assumptions around who can WFH and the amount of flexibility provided to them with every iteration of the program.

**If you would like additional support, have our analysts guide you through other phases as part of McLean & Company workshop.**

Contact your account representative for more information.

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# About

McLean & Company is a research and advisory firm providing practical solutions to human resources challenges via executable research, tools, and advice that have a clear and measurable impact on your business.

Our research team uses a rigorous research process to identify and hone best practices; create practical tools, templates, and policies; and supply clients with the insight and guidance of our subject matter experts. McLean & Company applies this proven research approach to both human resources and company management teams, creating complete solutions that supply the tools you need to get each project done right.

McLean & Company analysts bring real-world experience to the table and apply their knowledge to solving the challenges faced by our clients on a daily basis. This process is informed by the participation of a client base that includes over 30,000 members and by an evolving client-driven research agenda.

McLean & Company is a division of Info-Tech Research Group Inc.

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# McLean & Company offers various levels of support to best suit your needs

## DIY Toolkit

"Our team has already made this critical project a priority, and we have the time and capability, but some guidance along the way would be helpful."

## Guided Implementation

"Our team knows that we need to fix a process, but we need assistance to determine where to focus. Some check-ins along the way would help keep us on track."

## Workshop

"We need to hit the ground running and get this project kicked off immediately. Our team has the ability to take this over once we get a framework and strategy in place."

## Consulting

"Our team does not have the time or the knowledge to take this project on. We need assistance through the entirety of this project."

**Diagnostic and consistent frameworks are used throughout all four options.**

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