LISETTE SUTHERLAND

and K. JANENE-NELSON

foreword by JURGEN APPELO

WORK *together* ANYWHERE

A HANDBOOK ON
WORKING REMOTELY
—*successfully*—
FOR INDIVIDUALS,
TEAMS & MANAGERS

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How to Use This Book

GENERALLY stated, to work remotely successfully calls for a particular combination of tool set, skill set, and mind set. More specifically, different settings and contexts call for different combinations of tool set, skill set, and mind set. To help you determine which combination best suits your needs, this book is organized into four parts to guide you—be you employee or employer—straight to the information that will help most now, whether you're just considering working remotely, ready to start out, or perfecting your game.

If the concept of working remotely is new to you, begin with Part I, which relays the primary reasons why both employees and employers have opted to go remote. The Part I EXTRAS are geared toward those uncertain of just how to be effective in the virtual realm; there you'll find both answers to frequently asked questions and an at-a-glance view of some essential benefits of working on-site—as well as how to replicate them online.

Part II focuses on the details applicable to individuals working remotely. For those just contemplating the leap into remote work, chapter 3 begins with a section on deciding for yourself—after which it addresses what you need to get started. The Part II EXTRAS further the exploration with a questionnaire to help you determine if you're ready to work remotely—the results of which specify what you'd need to do to get ready. There is also guidance on taking your decision to the next level, be that convincing your boss (or team) or seeking remote employment. Chapter 4 expands the scope to discuss wider concerns: how to work well for yourself, as well as how to work well with others.

Part III begins the consideration of the remote option from the managerial perspective. For companies or departments first venturing into the virtual realm, chapter 5 shares how to prepare for the expansion, while chapter 6 and the Part III EXTRAS cover how to hire remote employees.

Part IV outlines the full range of what it means to manage remote teams. It walks you through how to make the experience productive, effective, and fun for everyone—from assessing how to translate your on-site needs to the online realm to crafting a team agreement on how everyone will work together. Chapter 10 also includes guidelines on running effective meetings, how to experiment in iterations—even how to scale up when the time comes to grow. Among the Part IV EXTRAS is the Manager's Action Plan, which consolidates the action steps discussed in the individual chapters.

Following the conclusion chapter, the extensive RESOURCES section identifies where to head next, whether you seek details on the plethora of technology & tools available or need more ideas on a wide range of topics, from etiquette and HR to icebreakers and Retrospectives.

Another note: because much of the material relayed here applies to a variety of readers and situations, there is some necessary overlap. So, some information appears in more than one spot and in more than one way. As it happens, those points of overlap emphasize the most important aspects of how to work together well, and so are worth repeating.

Join me in exploring the wonderful world of remote working!

Foreword

TODAY'S meeting with my Agility Scales team was a good one. In the first five minutes, we discussed the most fashionable carnival costumes for our kids. (This season, it's LEGO ninjas, apparently.) The discussion was part of our mandatory chitchat ritual, which both forbids us from immediately diving into work mode and challenges us to be more human and personal with each other. For five minutes.

After the chitchat, we had a vigorous discussion about how to describe the nature of our online product, as well as what terminology to use to best explain it to our customers. We also talked about the priorities of new product features, the role of our user community, and several important decisions we had to make. It was a delightful conversation, one in which everyone participated equally and which felt like a strange mix of marketing and existentialism.

We finished the meeting after precisely one hour, which is how we like it. As usual, we finished with our return on time invested (ROTI) ritual. At the count of three, everyone signals how useful the meeting was by holding up between one and five fingers. Everyone rated the meeting a five—except Kirill, who offered a four. An almost-perfect rating! We joked that we'd never invite Kirill again, and he joked back that he hadn't been invited; he had just shown up to annoy us. A big laugh followed, and then I clicked the LEAVE MEETING button.

I took off my noise-canceling headphones, put away my Android tablet, looked around the airport café to see if anyone had stolen my stuff during the meeting, and then gathered my belongings to go and find my departure gate.

I am a remote worker. I can do my work anywhere.

In my opinion, work is something you do, not a place where you go. This attitude requires a particular way of thinking, a different approach to organization, and a bit of planning.

Where do you keep your documents when your office is wherever you happen to be? How do you work as a team when you rarely get to see each other face-to-face? What are the best tools for online meetings, schedules, workflows, design, and development? And how can you do your work when you're in an environment that's not conducive to focused, creative thinking?

The world of business is not used to this style of working. In fact, the terms that people in "normal" companies use for my kind of work life are all inept, in my view. Why do they call it "remote" working? My company has no office, so there's no central place for me to be "remote" from. And what's the deal with "virtual" teams? Is our team not "real" because we're not physically colocated? And don't get me started on IRL (in real life). I think I enjoy more of a real life than do most office workers, who are slowly dying between four gray walls.

Speaking of both "virtual" and "office" workers, in 2013 I hired Lisette Sutherland to be the virtual team manager for Happy Melly, a global professional happiness association dedicated to helping people be happier at work. Considering that I wanted to build a company without a physical office, and since Lisette was a pioneer in this realm, it made sense to let her do all the learning and exploration and then ask her to show us all the tips and tricks. It turns out that was a great decision. Now Lisette has done the same all over again: she's done all the learning and exploration about virtual work life and teamwork—and now she can teach you everything you need to know to also be a success in this arena.

I started writing this text at Toulouse–Blagnac Airport in France. I'm now completing it in one of my favorite coffee bars in Rotterdam, the Netherlands. In between, I've been writing to you from Düsseldorf, Brussels, and Amsterdam. At the same time, I've also been remotely managing distributed teams spread out over a dozen or more countries on four continents. I'm sure you didn't notice all the smooth transitions.

Does it all sound unfamiliar or challenging? Don't worry. Lisette is here to tell you how you can organize this for yourself and for your teams. So stop going to work; start doing the work!

—JURGEN APPELO, author, speaker, entrepreneur

Introduction

IN 2006, I lived in California and belonged to a social community interested in technology, the future, and staying healthy. Every Sunday we went hiking together. One person in the group particularly interested me because he was working on a peculiar start-up idea: he wanted to eradicate death.

I learned there are a lot of longevity devotees out there experimenting with and researching anti-aging: rocket scientists, theoretical physicists, entrepreneurs, software developers. Some practice calorie restriction. Some research cryonics. Some work on nanotechnologies. Through his networks, my death-defying hiking friend was introduced to others working toward the same goal—but no one was talking regularly or sharing data. So he dreamed of building an online project-management tool to enable longevity scientists from all over the world to collaborate and solve the problem of aging.

It was an aha! experience for me. For centuries, employers have hired the most qualified workers who were able to convene at a central location. The location was by necessity the constant; the variable was the most qualified workers able to convene. That didn't necessarily mean the team was populated by "the best and the brightest"—just the best who were nearby or willing to relocate. Of course, that's the employer's view. From the employees' view, the job offers they accepted were the best they could get at the time—whether or not those jobs made them excited to get up in the morning.

But if instead we found a way to make location the variable—indeed, immaterial—then we could have the constant be the far more important concern: qualification, including enthusiasm. Employers could hire the best, the brightest, and the most dedicated—wherever those workers happen to be.

I love this concept. I've held a job that I took on because it was a "good job"—despite the fact that it didn't excite me. And every day, when I arrived at what I called my gray cube (a cubicle like in a *Dilbert* cartoon), a part of me thought, *Ugh. This is not the life I envisioned for myself.* After several years,

being rather young and naive, I quit my stable, good-paying job and pursued work that allowed greater self-expression, work that made me feel more alive. It wasn't glamorous and it didn't pay well for a long time, but I eventually found my niche and my own version of success.

It just thrills me to think that technology could make it so that everyone can engage in work that jazzes them. So I started talking to others who were thinking this way too, and I found a lot of people to talk to. I've interviewed directors and managers from more than eighty companies whose business models *depend* on successfully bridging distance—companies that, for example, provide consulting services, outsource work, and offer training courses. In addition I've talked with hundreds of people—from software developers to HR directors to neuroscientists. Everyone had a lot to say about how they make working remotely work for them or their teams. Some things I already knew or had guessed, like the need for regular contact and team building. Some things really surprised me, like how much connection can be created just by turning on the video camera, as well as how reluctant we all can be to try new things.

One of the biggest takeaways I got from all those conversations is that there is no "one solution fits all" for remote working, no single formula to follow. Each person, each company, will need to experiment with various tools and processes to find what makes him, her, or them most productive. But what are the tools available? What processes are effective for different kinds of remote teams? I rustled the virtual bushes to learn everything I could about how to make working remotely not just workable, but undeniably productive—and, in some cases, even preferable. All that and more has been collected in these pages.

To best help you navigate this terrain, this book is divided into parts and chapters suited to different kinds of readers at different stages in the going-remote process. (Please forgive this repeat if you've already read "How to Use This Book.") If all this is completely new to you, start with Part I, which offers a bird's-eye view of the current landscape of remote working, detailing some of the who, what, where, and why of it all. Part II is for individuals, whether you're considering going remote or you're ready to start out (chapter 3), or you're perfecting your game (chapter 4). Parts III and IV are

for team leaders and managers/owners: those transitioning to the remote option (chapter 5), those hiring remote workers (chapter 6), and those looking to perfect their game (chapters 7 through 10). Following the chapters in each part are Part EXTRAS: additional resources particularly applicable to that group. After Part IV is the RESOURCES section, which includes additions applicable to many—especially "Technology *&* Tools." And for those who would benefit from more personalized guidance, you'll also find information about the Work Together Anywhere Workshop, which is available both online and in person.

Be sure not to miss the conclusion, where I wax poetic about how people from all corners of the globe have figured out how to flourish working remotely—and how in so doing have achieved marvels previously thought impossible. And, finally, I want to give a shout-out to the remote-working experts I interviewed for the Collaboration Superpowers podcasts—which as of this writing has aired its 175th unique episode. In the "Interviewees" section I share a bit of what each professional has to offer—as well as information on how to further your acquaintance should you wish to learn more.

ONE of the premises of this book is that to be better informed is to be better prepared. So I strongly recommend that you at least skim the portions written for those you'll be interacting *with*. The more you understand their perspective, and they yours, the better you'll be able to forge something undeniably productive together. This broader perspective magnifies everyone's understanding of how to make it all work well.

For those who haven't yet made the leap, the prospect of going remote can feel daunting—but it doesn't have to. Whether you're an individual, a manager, or an owner, in the pages that follow you'll find all you need not just to get started but also to get ahead. The information collected here paints a bright picture of the possibilities available to us today. Plus, given that businesses are constantly adapting, and the technology of remote collaboration is always improving, the future looks even more promising.

As I continue to interview people who work remotely, I meet ever more people from all over the world who actively pursue work they love. When I think back to my gray days in that cubicle, I think about all the people

who currently view their work equally dimly. But they don't have to—the technology exists to bridge distance between a dedicated worker and a job worth getting up for in the morning. In the pages to come, I'll share how to do just that.

By the end of our journey, it's unlikely we'll have eradicated death, as my ambitious colleague aspires to do. But with the tips, tools, and to-do lists that follow, I hope to open your eyes to the possibilities that exist right now for working remotely—and to inspire you to do great things too. Just think of what we could accomplish when we get the right people working together!

PART I
SETTING THE SCENE

Some of the Who, What, Where, and Why of Remote Working

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As noted earlier, Part I aims to succinctly convey the terrain in which remote workers and employers find themselves—as well as a bit of what brought them there. Chapter 1 takes the viewpoint of the worker, sharing just what makes the remote option so appealing. (In a word: flexibility.) Chapter 2 demonstrates what a win-win for employers that flexibility can be. And for the more skeptical readers—or those who answer to more skeptical figures—that chapter shares both some common concerns about the remote option and possible solutions. The Part I EXTRAS section continues that discussion with "Frequently Asked Questions," whose answers cross-reference where in the book more information can be found. And "At a Glance" encapsulates some of the many ways to replicate online the benefits of working on-site—material covered in detail in chapter 8.

As for further down the road, individuals ready to move forward can head to Part II—Individuals Working Remotely. Managers ready to move forward can head to Part III—Successful Remote Teams 101: Transitioning and Hiring. Those managers already in remote waters can seek out Part IV—Successful Remote Teams 201: Managing Remote Workers and Teams.

CHAPTER 1

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Why Are Individuals Going Remote? Workplace Flexibility

"A lot of what we're looking at is not new. It's just that technologies make working from anywhere possible for a lot more people."

—Pilar Orti, *director, Virtual not Distant*[1]

Most of this book tells you how you can make a success of working remotely, whether you're a team member, a team leader, or flying solo. But before we get into that, some—especially managers—might wonder how it's possible to get *valuable* work out of unsupervised employees. The answer to that question has multiple aspects, the most significant of which hinges on why workers seek remote employment options in the first place. We'll return to both questions later in this chapter. But to best understand the full picture, let's take a look at what kinds of people work remotely.

Some Terminology on Remote Working

Individuals who work remotely can be full-time telecommuting employees, contract freelancers—even digital nomads. [Note that all terms identified by bold italics are included in the glossary.] They typically fall into one of three "employee" types: telecommuter, self-employed, and business owner.

A ***telecommuter*** is someone who works remotely (usually from home), either full time or part time, on a fixed team for one company. According

to research firm Global Workplace Analytics, a typical telecommuter in the United States is forty-five or older, college educated, and works as a salaried, non-union employee in a professional or even management role. He or she earns about $58,000 a year and most likely works for a company with more than one hundred employees. (In addition, 75 percent of employees who work from home earn more than $65,000 per year, which puts them in the upper eightieth percentile of all employees, home or office-based.)[2]

Many remote workers are ***self-employed freelancers***. They run mainly service-based businesses and usually work with more than one remote client, whether simultaneously or consecutively. (As noted in the sidebar to follow, Upwork and Freelancers Union define ***freelancers*** as "individuals who have engaged in supplemental, temporary, or project- or contract-based work within the past twelve months."[3])

Some self-employed freelancers are also small business owners, whether ***solopreneurs*** or entrepreneurs (with a few remote employees or contractors).

Any of the above could also be a ***digital nomad***: those who use portable technology to maintain a nomadic lifestyle.

The Five Types of Freelancers

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Originally, the term "free-lancer" described a medieval lancer for hire, one not sworn to defend a particular lord. Today there are five main types of free-lancers, defined by Upwork and Freelancers Union as "individuals who have engaged in supplemental, temporary, or project- or contract-based work in the past twelve months."

INDEPENDENT CONTRACTORS (40 percent of the independent work-force/21.1 million professionals): Rather than having a steady, full-time employer, these "traditional" freelancers do project-based freelance, temporary, or supplemental work.

MOONLIGHTERS (27 percent/14.3 million): Professionals with a primary, traditional job might also moonlight doing freelance work—perhaps for lower-paying non-profits whose missions they support.

DIVERSIFIED WORKERS (18 percent/9.3 million): Some cobble together a living from a mix of employers. For example, someone who works steady hours as a part-time receptionist might also wait tables, drive for Lyft, and write freelance articles on the side.

TEMPORARY WORKERS (10 percent/5.5 million): This category includes those with a temporary employment status, whether that be one day as a film shoot makeup artist, several weeks as an office or warehouse temp, or several months as a business consultant.

FREELANCE BUSINESS OWNERS (5 percent/2.8 million): A freelancer can also be a solopreneur (with no employees) or an entrepreneur who employs others (usually between one and five employees or subcontractors).

Source: Upwork and Freelancers Union, "Freelancing in America: 2017."[4]

Though working on-site is still the norm in certain sectors, not all tele-commuters are seen as an anomaly in their department. Indeed, some companies have turned the concept of "normal" employee on its head, and have teams partially—or even entirely—made up of remote workers.

Remote teams are groups of people who work together on a project: sometimes for the same company, sometimes as a group of freelancers, and sometimes as a combination of both. They typically fall into one of the four following categories, often determined more by location than by function. In some teams several members work together in the same location ("*colocated*"), while others work remotely; this is what's meant by the term "*partly distributed*." In some teams everyone works remotely, regardless of location; this is also known as being "*fully distributed*." Expanding to the company level, some companies are made up of several teams in different locations. And, of course, there are global organizations with offices in different locations. To follow are some examples.

IN PARTLY DISTRIBUTED COMPANIES, SOME WORKERS ARE CO-LOCATED, AND SOME ARE REMOTE. Targetprocess is a company of about eighty people. The majority of the team—90 percent—works together at the company headquarters in Minsk, Belarus; the remaining 10 percent is

spread across the world. For Suitable Technologies it's more of a 40/60 split: roughly 40 percent of its staff commutes to the headquarters in Palo Alto, California, while the other 60 percent beams in to drivable robots.

IN FULLY DISTRIBUTED COMPANIES, ALL WORKERS ARE REMOTE. Happy Melly is a global professional happiness association that provides access to resources promoting job satisfaction and professional development. The members of its remote team—myself included—work from Belgium, Canada, Finland, India, the Netherlands, Russia, Slovenia, Spain, South Sudan, and the United Kingdom.

StarterSquad develops software for start-ups, all care of their international team of highly skilled developers, designers, and "growth hackers." Their team has an interesting "How did you get together?" story. A client with a software development project hired various freelancers using the online working site Upwork (formerly Elance). Though they didn't know each other before the project started, over time the team clicked—so well that, when the client unexpectedly ran out of money, the team members weren't ready to part ways. They've operated as a self-organized team of entrepreneurs ever since.

SOME COMPANIES WORK WITH SEVERAL TEAMS IN DIFFERENT LOCATIONS. Before starting his own company, Ralph van Roosmalen worked at an office in the Dutch city of 's-Hertogenbosch, where he managed three teams based in three countries: the Netherlands, Romania, and the United States. The partners at Radical Inclusion also live and work from three different countries: Belgium, Brazil, and Germany.

Geographic and Cultural Definitions

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Geographically speaking, remote teams can be in the same location, near-located, or far-located. ***Near-located*** generally means that team members are within driving distance of each other. ***Far-located*** teams include one or more people who are far enough away that getting together in person

requires planning. (The farthest far-located prize goes to the six people who work on the International Space Station, which orbits the Earth once every 90 minutes at a distance of 250 miles from our planet. Back on Earth, a team works to support them remotely at NASA—the National Aeronautics and Space Administration—themselves working from all over the world.)

Another aspect of remote working involves different cultural characterizations, which are often referred to as "near-shoring" and "off-shoring." When people from countries with a similar language and/or culture work together, it's called ***near-shoring***, such as a team with members in Europe, Scandinavia, and the United States. When people from countries with rather different languages and/or cultures work together, it's called ***off-shoring***, such as a team with members from Colombia, Europe, Pakistan, and the United States.

The Face of Remote Working

What about the individuals working in these capacities and configurations—what kind of people seek work outside the traditional office setting? A wide range, actually. Since working remotely usually requires some sort of technology, one might imagine such workers are mostly members of the millennial/Gen Y generation or younger (namely those born after 1985). Globally this is likely true; according to the 2018 Payoneer Freelancer Income Survey, more than 50 percent of respondents—21,000 people in 170 countries—are under age thirty.[5] But in the United States the average skews higher. According to 2017 State of Telecommuting in the U.S. Employee Workforce report, half of telecommuters are forty-five or older.[6]

In August 2017, the online employment resource FlexJobs, which specializes in professional flexible employment, published the results of its annual survey of those in the United States seeking flexible employment—5,500 respondents. Baby Boomers and "Gen-Xers" (together, those born between 1945 and 1984) comprise nearly three-quarters—72 percent. And the survey pool self-identified as a diverse group of working parents and entrepreneurs, students and retirees—the vast majority of whom (81 percent) sought to telecommute for their entire workweeks.[7] (See the sidebar to follow.)

Stats from the 2017 FlexJobs "Super Survey"

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RESPONDENTS (5,500) SELF-IDENTIFIED AS

- Working parents (35%)
- Freelancers (26%)
- Entrepreneurs (21%)
- People living in rural areas (15%)
- Stay-at-home moms (14%)
- People with chronic physical or mental illness (14%)
- Digital nomads (12%)
- Caregivers (9%)
- Students (9%)
- Retirees (8%)
- Super-commuters (8%)
- Military spouses (2%)
- Stay-at-home dads (2%)

AGES/GENERATIONS

- Gen X (41%)
- Baby Boomer (31%)
- Millennial/Gen Y (21%)
- Silent Generation (6%)
- Gen Z (1%)

QUANTITY OF WORK SOUGHT

- Telecommuting 100% of the time (81%)
- Flexible schedule (70%)
- Telecommuting some of the time (46%)
- Part-time schedule (46%)
- Alternative schedule (44%)
- Freelance contract (39%)[8]

Such a diverse group has numerous reasons for preferring to work remotely. For many it's about schedule—specifically, the ability to maximize the time spent with their families. Indeed, a separate 2017 FlexJobs survey found that parents rank work flexibility (84 percent) ahead of even salary (75 percent).[9]

For some, the answer concerns their SITUATION, such as stay-at-home parents or adults caring for their parents, and military spouses—who appreciate not having the family's next deployment disrupt their own employment. Retirees are also keen remote workers. Entrepreneur, speaker, and author Leslie Truex notes that "a lot of people are looking at how they can supplement their retirement. Or they are already retired or want to retire sooner—and know they need an income to do that."[10] Writer and career development expert Brie Reynolds agrees, sharing: "Both my parents are in retirement now. They want to stay active, but they don't want to commute every day—and they don't want all the office politics. What they *do* want is to apply the knowledge and the skills they've learned across their lifetimes to something meaningful in retirement."[11]

But one of the biggest reasons remote working is on the rise derives from sheer opportunity. With the proliferation of online work websites (like Freelancer.com, SimplyHired, and Upwork), there are ever more opportunities for contract work. The survey "Freelancing in America: 2017" notes that "71 percent of freelancers say the percentage of work they have obtained online has increased over the past year," and that 77 percent of those "who have found work online" start projects "within a week." Indeed, at the "current growth rate, the majority of the U.S. workforce will be freelancers by 2027."[12] As for the income from that work, in early 2018 annual freelancer earnings on Upwork.com reached the $1.5 billion mark.[13]

An additional factor within sheer opportunity is how working remotely allows an employee to test out a new position *before* relocating. As financial services executive Jeremy Stanton puts it: "There's a lot of risk taking a job, especially when you have to uproot your family and move. What if you get six months in and it doesn't work out? That's an awful conversation to have with your spouse. If you start remotely, there's more room to ramp up into the company, and everybody gets a chance to see if it works out."[14]

And many seek remote employment in the face of insufficient in-office opportunities. Leslie Truex reports: "Though some people are scared to become freelancers because they want the salary and benefits they're used to, we're seeing that more and more employers are cutting benefits, even if they aren't going out of business. The idea that the in-house job is the safe route isn't necessarily true anymore."[15] In other words, many freelancers feel they have more stability working for themselves—because they don't rely on one company for their income. I faced this scenario myself. One company I worked for went out of business overnight because their one and only investor was involved in a scandal. I was at my next job for two years until the company was sold, leaving me unemployed again. That inspired me to stop looking for "regular jobs" and instead take things into my own hands; essentially, I switched to full-time freelancing for job *security*.

An additional, widely shared reason for preferring the remote option concerns COMMUTING. For some, it isn't so much that they don't want to work on-site—it's the getting there that's the problem. As SourceSeek cofounder Dave Hecker puts it, "The world is changing. A lot of people don't want to come to the office anymore."[16] Among my own interviewees, the number-one reason people want to work remotely is to end the dreaded commute. Around the world, commuting times vary, from a few minutes to a few hours per day. According to the 2016 "PGi Global Telework" Survey, the majority of surveyed "non-teleworkers" commuted thirty to sixty minutes round-trip per day; the figure exceeds an hour for one-third of those in the Asia Pacific region.[17] Every minute we commute is a minute we aren't working or doing something we love—or being with someone we love. On top of that, the journey itself is often stressful, rife with traffic jams, crowded buses and trains, delays, smells, and noise. The world over, a large number of workers feel a bad commute can ruin a great job.

Another factor about commuting concerns expense, both of the commute itself as well as the cost of living within a decent commuting distance from work. Several of the people I interviewed appreciated being able to enjoy a metropolitan income while also residing in a region with a low cost of living.