Handbook on proposed best practices for work from home



| **ID** | **Category** | **Best Practice** |
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| BP01 | Communication | Foster personal relationships |
| BP02 | Communication | Save certain time slot for answering emails |
| BP03 | Collaboration | Set up mentoring (especially for onboarding) |
| BP04 | Collaboration | Avoid hybrid work (when possible) |
| BP05 | Collaboration | Collaboratively work on strategic decisions/documents |
| BP06 | Collaboration | Parallelize tasks and communicate status |
| BP07 | Management | Manage people oriented |
| BP08 | Management | Foster autonomous decision making |
| BP09 | Management | Establish a tangible mission and vision (e.g. by implementing OKRs) |
| BP10 | Tooling | Use appropriate and proven tools |
| BP11 | Communication and Collaboration | Foster asynchronous communication/collaboration (when appropriate) |
| BP12 | Communication and Collaboration | Set up meeting rules |
| BP13 | Communication and Collaboration | Communicate availability |
| BP14 | Communication, Collaboration  and Management | Distribute information equally |

| **BP01** |
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| **Name**: Foster personal relationships |
| **Context**:  Due to the corona pandemic and the associated lockdowns beginning in March 2020, many employees started working entirely from home. Even if now, in 2024, most employees can work in the office again, many prefer work from home. The resulting lack of personal contact causes manifold negative effects like misunderstandings, lack of identification with the team and the company, isolation and many more. |
| **Problem**:  How can the lack of personal contact be compensated in a new working environment where many people work from home entirely or come to the office only on an irregular basis? |
| **Solution**:  Short term measures:   * Plan some time for personal talk at the beginning or at the end of meetings * Set up meetings with no other content than chatting privately e.g. virtual coffee breaks * Introduce systems or apps to generate random pair remote get togethers (e.g. Donut provided by Slack)   Long term measures:  It turned out that meeting in person cannot be substituted by any virtual measure, thus, on a long term perspective it is inevitable to set up meetings in person on a regular basis even if this is only once a year (e.g. conferences, workations or team onsites) |
| **Traces in our data**: [I01], [I03], [I09], [I10], [I15]  **Example trace in our data**: “One thing that we also do is, we also now have a weekly meeting, a set time, with no agenda. [...] And that also helps tremendously.” [I03]  “For example, once a week we raffle off a so-called mystery lunch, where five people get to register and then you get a 20 EUR voucher sent to you by email if you win. And then you can talk at twelve, quasi one and a half hours with five other, randomly selected people [...] that is quite fun.” [I15]  “We could not have that obviously during the pandemic, but we are trying to move back and have those (meetings) in person again because we found that the virtual format just didn’t really work almost at all.” [I10] |

| **BP02** |
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| **Name**: Save certain time slot for answering emails |
| **Context**:   * People report to receive many more emails in a remote setting than when working in the office * Many emails reach them in Cc and thus they don’t know how to classify their urgency, importance and if there is an actual to do * Through incoming mails many employees feel disturbed in their work and are torn away from their current tasks |
| **Problem**:  How can distraction due to incoming mails be avoided? |
| **Solution**:   * Save a certain time slot per day for your mails (e.g. first hour of working day) * Communicate that you only answer mails once a day or less frequent * Turn off e-mail notifications and shut the mail program after this dedicated time * For very urgent, important news or questions people should call you or write in a chat group with a larger audience, if there are more people who could possibly help or decide |
| **Traces in our data**: [I11], [I12]  **Example trace in our data**: “I don't read my emails daily, more like weekly.”  [I11]  “Have focus times to view the mails and messages, and afterwards to put yourself on “Not available”, so that one can work [...].” [I12] |

| **BP03** |
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| **Name**: Set up mentoring (especially for onboarding) |
| **Context**:   * There is a difference in how close people want to be supported and how much synchronous communication they need * Mainly newer team members often need more of both * In a remote setting it is difficult to find the right contact and sometimes employees feel a barrier in writing their questions in an open group (due to fear of looking foolish) but also do not want to disturb people by calling them |
| **Problem**:  How can this barrier be dismantled? |
| **Solution**:   * Set up a mentoring program (especially for the onboarding of new colleagues, but also later, employees (both mentor and mentee) can benefit from such an offer) * Becoming a mentor should be voluntary * Carefully match mentor and mentee (or let mentees select from a list including profession, preferences…) * Perhaps offer special appreciation for this e.g. pay mentor and mentee common meals (can take place onsite or also remote) * Collect feedback about experiences and whether selected mentor is suitable for this task |
| **Traces in our data**: [I02], [I07]  **Example trace in our data**: “So, you have to take a lot of responsibility for yourself. So, there are also, for example, in the software projects there are sometimes, there are people, newcomers, who need more help. They have a mentor and the rest of us don't even notice what they have for meeting needs, they work that out amongst themselves. I've seen other pairings of menti and mentor where you know there's also a lot of communication in the background. And that's also important for sure, so if someone needs help and doesn't get any further, that they know who they can turn to.” [I02]  “So, I would say that particularly for junior people and or people that are new to the organization, a certain amount of synchronous contact is valuable. But as people are more senior and working more autonomously, it becomes less important to have these synchronous conversations because you're not basically giving them a task so much as letting them work it out for themselves.” [I07] |

| **BP04** |
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| **Name**: Avoid hybrid work (when possible) |
| **Context**:   * Our new working reality (since the pandemic) is hybrid: some team members work from the office, others work from home * The employees in the office tend to have closer contact and share more information than they share with team members working from home * The employees at home feel excluded and distance themselves from the team |
| **Problem**:  How can this situation be avoided? |
| **Solution**:   * When possible, try to be either all or none of the team members in the office e.g. terminate specific team onsides (every month, quarter…) where everyone is invited to work from the office * If this is not possible or does not fit the company’s agreements, work like you are distributed even if you sit together in the office as soon as one team member works from home, that means:   + communicate important information via chat   + stay on your place for meetings and dial in via your own laptop |
| **Traces in our data**: [I03], [I05], [I06], [I08], [I10], [I15]  **Example trace in our data**: “Yeah, so I've experienced that to some extent. Everybody sits in front of their laptop, and you quickly connect. That has become so the standard now. What I experienced more often before was attempts to make hybrid stories, that a part of the team is in the conference room or an individual who is connected. Partly we also had such an expensive conference system that tried to connect the team rooms with each other and so on. And for me it turned out to be the only really working method that if someone works remote all are remote and you only do conferences where everyone is equal and have the same technical access.” [I05]  “Is that why I think that and actually we did this from the beginning already that even if people are sitting in the office, we actually still work as if we all would be distributed.” [I06]  “This was the main challenges […] this hybrid work. We then have regulated for us. And then please don't sit in threes and one sits at home, but then please dial in all three separately. Because this asymmetry can lead to problems, because then you feel quickly excluded or […] you don't have it right or you are not really heard. […] We try to prevent that.” [I15] |

| **BP05** |
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| **Name**: Collaboratively work on strategic decisions/documents |
| **Context**:   * Employees who work more strategically turned out to be less satisfied with the remote/hybrid setting than others as their work needs more frequent communication and tighter collaboration where many have not found an adequate way for * Creative and “out of the box” ideas are also more difficult to develop in a remote setting than in the original “workshop way” |
| **Problem**:  How can strategic collaboration be improved in a remote setting? |
| **Solution**:   * Use collaborative documents to evolve strategic documents/decisions where everyone has access and changes can be traced back * Treat these documents like code including version control, pull requests … * Use software programs that allow collaboration similar to workshops e.g. offer shared online whiteboards, voting functions, … (e.g. miro, mentimeter) * Have your own real whiteboard in your home office |
| **Traces in our data**: [I05], [I07]  **Example trace in our data**: “The team in which I work is strategically positioned. […] In the team in which I work, I have also sought out and created situations in which I can work collaboratively with open source approaches. For example, when we wrote documents, we organized them in an open source style, so that people could comment on each other's work and contribute, and we had kind of a patch workflow where people could send changes and comment on them, and so on, together in text form. In version control system, one workflow, which turned out to be totally powerful, is to write documents in aski doc, manage them in GitLab and then work with merge requests, to not work all together on one word document, but that one really makes it in text form so that one can also, that one can track the changes and everyone can make his own comments, that one can work together, but mainly that one can also work independently of each other. And that has really turned out to be very valuable for me now. I mean, that's the way that I know from the open source community, where it's been working great for 20 years.” [I05] |

| **BP06** |
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| **Name**: Parallelize tasks and communicate status |
| **Context**:   * Depending on deliveries or answers of colleagues who are not available because they are in meetings, have different working modes or working hours hinder proper collaboration. * In a remote setting it is harder to know if the people you need to get on with your work are available which leads to frustration |
| **Problem**:  How should employees collaborate to ensure an efficient workflow? |
| **Solution**:   * Do not work on one task only but parallelize tasks if possible so that you can proceed with another task while waiting for a delivery or an answer * Clearly communicate the status of your task (what you’ve done, what you’re working on currently and where you’re stuck with) and which delivery you need from whom till when * Have this communication asynchronously and in the established communication channel (e.g. chat, mailing list...) or in a dedicated meeting (e.g. daily) * Make sure the colleagues who are working with your delivery know everything they need to know to continue with the task * Build on a relationship of trust to ensure everyone’s messages are thoroughly red and questions are answered as soon as possible (so that the questioner do not have to worry about asking again) |
| **Traces in our data**: [I01], [I02], [I03], [I08], [I11]  **Example trace in our data**: “It’s important to relay the things that the other person should know, like if you’re handing over a job or if you say like, oh, I’m only halfway done, but this is what’s working so far. This is what I still need to do. [...] So it’s really important to do these status updates of what you’ve done, what you’re working on, where you’re stuck with.” [I08]  “You would know, like after a while, you know, what time zones (your colleagues) were and when you can ring them or not or you have a system where, you know, like if I know, if I ask someone a question and I know he or she will get back to me whenever he or she gets to a computer, I don't need to worry about having to ask it again.” [I08]  “If you have stuff that depends on deliveries of colleagues, then you can just work on several things [...] in parallel. We don’t have to slow down every single track, but in general you’re still making progress, [...] even if each track blocks 50 percent of the time, it’s still okay because at least you can move one along.” [I11] |

| **BP07** |
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| **Name**: Manage people oriented |
| **Context**:  Authoritarian and hierarchical management leads to dissatisfaction and employees quitting, especially because the labor market is good and due to remote work, people are no longer tied to a specific side. High fluctuation is a hindrance to the company’s development and growth. |
| **Problem**:  How should managers lead to retain their employees in the long term? |
| **Solution**:   * Trust that every employee is doing his/her best * Give feedback and also ask for personal feedback from your employees; gratefully accept and apply this feedback * Block time to talk to your employees about their experiences, work load, personal development etc. * Create a good working environment for your employees (e.g. by providing office equipment but also by listening to problems and be cautious about indications that employees are not doing well) |
| **Traces in our data**: [I01], [I12], [I14]  **Example trace in our data**: “I think that’s actually the main work of the managers now, just to pay attention to the quality of life or the quality of work of their employees. So not in the sense of making sure that they’re delivering high quality but they have a good working environment in which they can exist in the long term without burning out.” [I12]  “[...] So that’s why you try to work hard at you, I work harder at being people oriented than technical oriented anymore.“ [I14] |

| **BP08** |
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| **Name**: Foster autonomous decision making |
| **Context**:  Hierarchical decision making in combination with remote work and the accompanying more difficult reachability of bottle necks like experts or managers slows down the decision making process. |
| **Problem**:  What should the decision making process look like to ensure fast decisions without depending on bottle necks, which is essential in an IT related company? |
| **Solution**:   * Make sure everyone has all necessary information for the upcoming decision (e.g. through establishing common communication channels like having an email thread or certain chat groups) * Decentralize decision making to the individual employee respectively to the team * Build a culture of trust and self-responsibility * Have a conference call and involve the management only if the decision cannot be made in the team or within a considerable time |
| **Traces in our data**: [I03], [I06], [I07], [I10], [I11], [I15]  **Example trace in our data**: “[...] we already have quite a lot of decision making power in the teams [...] and the data that I need for the decisions is also available.“ [I15] |

| **BP09** |
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| **Name**: Establish a tangible mission and vision (e.g. by implementing OKRs) |
| **Context**:   * When people are less in the office they tend to distance themselves from their colleagues and from their company * This leads to the feeling of being unmotivated and listless * We found that people who can identify with their company’s goals, are more motivated and efficient |
| **Problem**:  How can a high identification with the company be established and hold in the long-term? |
| **Solution**:   * Establish a tangible mission and vision (best together with employees so that they can identify with the company’s goals) * One possible option to establish and measure these goals is implementing OKRs (Objectives and Key Results) * Make mission and vision available to everyone * Orient towards the company’s mission and vision in all hierarchical levels and all aspects of the company * Improve and further work on mission and vision respectively on the derived measures after measuring their success and obtaining employees feedback |
| **Traces in our data**: [I03], [I06], [I10], [I15]  **Example trace in our data**: “I think it's because the identification with what we do is very high […] that's where everybody kind of takes pride in working for the team and feels comfortable with the team and feels that the product, the open source product, is great and everyone is proud to be a part of that […]. I think that is a very big component. There's a lot of heart and soul from a lot of people.” [I06]  “We document the OKR's in a in a central location that is accessible for everyone so everyone can see other people’s individual OKR’s, and we also have companywide ones as well. So, we are trying to provide visibility into what other people are focusing on and this way we are trying to encourage collaboration between the staff members as well and just kind of making it easier to organize work in a way to be able to work together on things and not just individually.” [I10] |

| **BP10** |
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| **Name**: Use appropriate and proven tools |
| **Context**:  Tools that worked well in a former setting where everyone was together in an office perhaps do not work in a remote setting. In distributed software development there are well established tools just like in most companies after three years of remote work due to the corona pandemic. |
| **Problem**:  Which tools are appropriate for work from home respectively for a hybrid work setting? |
| **Solution**:  There is no tool that can fully cover all requirements of the actual work situation. Thus, tools for communication (conferencing and messaging), collaboration (work processes and strategic or creative collaboration) and documentation need to be established. The tools that support the actual work situation while covering all important aspects of work are the following:  Communication   * Conferencing: Tool that allows video calls, as well as screen sharing and chat options (e.g. Microsoft Teams, Zoom) * Messaging: Tool that enables fast communication and content sharing both from person to person and within a group including a notification option (e.g. Slack, Mattermost) and mailing (e.g. Microsoft Outlook)   Collaboration   * Work process: Tool that enables asynchronous collaboration while ensuring a defined process/workflow at the same time (e.g. Github, Jira) * Strategic/creative collaboration: Tool that provides features like a white board and can be used collaboratively (e.g. Miro, Mentimenter)   Documentation   * Tool for structured documentation that is accessible to everyone and can be adapted and expanded after certain workflow rules (e.g. Confluence) |
| **Traces in our data**: [I01], [I04], [I05], [I09], [I14]  **Example trace in our data**: “For communication [...] specifically for developers we have GitHub and we do our code revues in GitHub. When we have meetings that are [...] more creative and less technical like retros or improvement meets we use miro, that’s a tool where you can draw together on whiteboards [...]. I’ve already mentioned Confluence. JIRA is, I would say, the tool for communication of requirements, [...].” [I09] |

| **BP11** |
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| **Name**: Foster asynchronous communication/collaboration |
| **Context**:  In open source software development people often work from different time zones. Additionally, they mainly do not work on the open source project full time. Consequently, collaboration and communication have to take place asynchronously. As more and more job offers are 100 percent remote and thus the place of residence does not have to be the place of work, this could be the case for any work in future. Even if employees are not spread around the world, through remote work, they can adapt their working hours to their personal needs which means that some could work in the early morning and some in the late evening. |
| **Problem**:  How could employees efficiently communicate and collaborate when they do not work at the same core working hours? |
| **Solution**:   * Have most of the conversation asynchronously (e.g. chat or mail) * In this conversation communicate clearly what you need when from whom * Keep in mind which information your colleagues need to take over a task from you and make sure they get this information at one single point of truth (e.g. mailing list, Jira Ticket) * Only have synchronous communication if something is:   + urgent or critical (to clarify as fast as possible)   + complicated to explain (to avoid misunderstandings)   + human oriented (e.g. personal development, onboarding) * In case you have synchronous communication with a part of the team document decisions on a place accessible for team members who could not attend (e.g. confluence, chat group, mailing list) |
| **Traces in our data**: [I03], [I07], [I08], [I11]  **Example trace in our data**: “I would say that particularly for junior people and or people that are new to the organization, a certain amount of synchronous contact is valuable. But as people are more senior and working more autonomously, it becomes less important [...]” [I07]  “[...] we try too little to interrupt the other, as is possible [...] To initiate synchronous communication, in principle, both parties must agree.“ [I11] |

| **BP12** |
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| **Name**: Set up meeting rules |
| **Context**:  In a remote working context, people cannot ask questions “across the table”. Furthermore, there is still a strong focus on synchronous communication. This leads to an increase of meetings in many contexts (some even talk about an increase of time in meetings of more than 50 percent). Remote meetings also tend to be worse prepared in terms of structure and moderation. There is a lack of established and proven meeting rules for virtual meetings. This means costs for the company without generating the desired output and leads to dissatisfaction of meeting moderators and participants. |
| **Problem**:  How to use meetings effectively, prepare them properly, and generate a measurable output? |
| **Solution**:  Settings:   * Implement settings or rules that do reglement meeting lengths * Have at least one fixed day free of meetings per week * Try to have as few meetings as possible   Meeting preparation:   * Focus on having the “right” people in the meeting e.g. management and experts (not the whole team) * Holistic preparation of meetings (both moderation and participation) * Have a clear and explicit meeting goal   During the meeting:   * Clear focus on the meeting goal * Have clear and explicit meeting rules (e.g. hand raising for questions) * Stay in time |
| **Traces in our data**: [I01], [I02], [I07], [I11], [I12], [I14]  **Example trace in our data**: “From 2015 to 2018, we had technical stand ups, but at [...] (our company), we have meetings twice a month instead. Otherwise, there are actually no meetings. And they’re all completely prepared beforehand as well. So, the board meeting, for example, goes over 80 reports in just half an hour because everybody looks at it beforehand and they only address the things where there’s any questions.” [I02] |

| **BP13** |
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| **Name**: Communicate availability |
| **Context**:   * People tend to no longer work on certain specified core working hours (perhaps not even in the same time zones) * Thus, colleagues might be difficult to reach * If people needed e.g. experts, managers… are not available this may lead to frustration |
| **Problem**:  How can I ensure that everyone who is needed for completing a task or making a decision is available? |
| **Solution**:   * Tight communication, about who is when available * Update your calendar regularly * Information (e.g. in the chat group) when unexpectedly / spontaneously not available * Try to proactively share all information relevant for others (view also BP06 (Parallelize tasks and communicate status), BP11 (Foster asynchronous communication/collaboration)) |
| **Traces in our data**: [I01], [I05], [I08], [I14]  **Example trace in our data**: “We've also gotten very good at letting each other know where we're at, so if somebody needs to take off, we use slack for example. They say, hey, I'm going to be out from this time to that time, you know, and things like that. So, I think the team has gotten better at communicating with each other.” [I14]  “[…] we use more calendars to see if people are available and free than we would have been in days past.” [I14]  “That's a lot easier in an open source world, because I can only do what I want and what I can do and I'm not forced to work eight hours a day if it doesn't fit in. […] But I think, there is actually still missing yes maybe flexibility or also the culture that it is okay if someone does not work in the afternoon, but in the evening.” [I05]  “You would know, like after a while, you know, what time zones (your colleagues) were and when you can ring them or not or you have a system where, you know, if I ask someone a question and I know he or she will get back to me whenever he or she gets to a computer, I don't need to worry about having to ask it again.” [I08] |

| **BP14** |
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| **Name**: Distribute information equally |
| **Context**:  Due to the remote setting and not being physically together at one single location some people have the feeling of not receiving all information they need, they are afraid to get overlooked or have to put enormous effort to stay up to date. |
| **Problem**:  How can information be distributed equally to ensures everyone’s access to all information? |
| **Solution**:   * Distribute information asynchronously (view also BP08 (Foster autonomous decision making)) * Have one single point of truth that is accessible for everyone e.g. mailing list, chat, intranet or tickets * Have clear channels or meetings and defined people for the distribution of information * Record important meetings/decisions for people that cannot attend |
| **Traces in our data**: [I01], [I07], [I09], [I10], [I15]  **Example trace in our data**: “On the one hand, we encourage everyone, if they’re having problems [...] always use the larger target audience [...]. Secondly, that’s what the Daily Standup is here for [...]. And the third [...] I and the product owner are the main responsible for the team, so to speak. We are very close in the exchange and always think about what we should and must communicate top-down, when and how quickly.” [I09]  “If the topic is not sensitive or it could be relevant for others on the team, we are just trying to make sure that we discuss as many things in the slack channels as possible as opposed to direct communication between two people or a small group of people behind closed doors.” [I10] |