

Transitioning to a Remote-First Work Environment

Transitioning to a remote-first work environment is a significant change in both process and mindset. Inclusion, connection, and effective communication are imperative to the long term success of a remote work environment and retention of remote team members. Setting up remote-first processes before your first remote hire or your transition to remote working will increase productivity and team satisfaction and minimize frustrations.

Key considerations prior to going remote

● Accessibility - Working in the cloud or having accessibility to a hosted server is required for remote work.

● Security - Having secure workstations, logins, and financial data is imperative.

● Virtual and automated project management - Streamlining team member dashboards for projects, task management, and project completion is essential.

● Communication - Implementing Teams or Slack for firm-wide and direct communication through text, video, and screen-sharing is a must.

● Expectations and Feedback - It is necessary to define expectations for workstations, hours, and productivity as well as setting a process and frequency for individual feedback.

● Connection - Scheduling daily/weekly "cameras on" team meetings, bi-weekly 1-1, and even in-person meet-ups (if applicable) will help maintain or create a culture of unity and trust.

Adopting a remote-first work environment is more than sending everyone home with a laptop and login.

A remote-first work environment requires planning and thinking differently about current processes. Implementing effective alternatives for walking to someone's desk to ask a question or calling an impromptu meeting in the hall with those physically present will lead to the success and likely improve the efficiency of your organization. If you would like more details on how DBA transitioned to a remote-first work environment, contact Rachel Dillon at Rachel@DillonAdvisors.com.