Functionly

The COVID-19 Work Survival Guide

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Everything... **CEO** is changing.

Contents

Part 1

An Organization's Survival Guide to the COVID-19 Global Pandemic

This year is getting off to a rough start. COVID-19 is spreading quickly and fears are growing. Organizations are being forced to evaluate their processes, spend, and strategic plans. Events are being cancelled, stocks are nosediving, and sales are collapsing. Teams of all sizes are going to have to make big changes, quickly.

But, as history has proven, great things are born out of adversity! So while this is a difficult season for many, the folks at Functionly are turning this into an opportunity to build better systems and processes, and reevaluate 2020 plans.

Using business functions as a lens, we have compiled some of the best advice and tools coming out of the SaaS community, as well as other industries, to evaluate organizational spend, maximize an existing workforce, create agile processes, and manage organizational crisis. Are you shifting to a remote team overnight?

We have a separate resource which covers how to transition to a remote organization here best practices for remote teams here.

1.1 Reduce Organizational Spend & Improve Cash Flow

Given all the anxiety and uncertainty that a global pandemic can create, this might be a time to evaluate the risk appetite and organizational limitations that may arise with potential pressures on revenue – this could include client churn, delay in accounts receivable or capital becoming more challenging to raise.

TIP: Evaluate Spending

Manage and evaluate your cash flows. Examine whether your capital spending plans are sensible in a more uncertain environment. It might be better to hold-off on expenses or delay for a quarter, until you are more certain of economic reactions. Moving fast and being agile is great, but your organization needs to make sure your strategy is not impacted unintentionally by overreacting or over-correcting.

→ Approve All Future Expenses

Freeze auto-approval for non-essential spending. Review each purchase, hiring need or spend decision, and make sure every dollar counts. Put processes in place to grab hold of those costs.

→ Forecast & Reforecast

Build a scenario forecast that shows potential negative economic impact on the business, and have a plan in place if your customer comes under pressure (e.g. payment plan, delayed billing process, cancelling contracts, etc.).

→ Review Spend

Create a "products and services to keep" list for your worst-case scenario forecast. Consider cancelling any non-critical product or service.

→ Review Cash Collection

Review your organization's cash collection process and make sure your approach to cash-collection is supporting healthy customer relationships. You want to make sure your approach encourages your organization to be on the top of their "products and services to keep" list. Your customers will be impacted by a change in business as well, so keep that in mind as you request payment.

→ Assess Your Current Headcount & Growth Plans

If your forecast requires a change in headcount to remain sustainable, then this can be hard for the entire team. Below, we have tips on how to reduce headcount and optimize your current workforce, if you need to do a hiring freeze or reduction.

Tools

Blissfully
Gives you automated visibility into your SaaS apps, usage, and spend, along with powerful workflows to manage change.

Fathom
Comprehensive financial intelligence, performance reporting, dashboards and consolidations.

Wise-Sync
Can help you capture many efficiencies across your business, giving you an up-to-date, real-time indication of your financial situation.

Xero
Accounting software that helps small businesses.

Resources

Coronavirus Implications for Business

Coronavirus: The Black Swan of 2020

What Coronavirus Could Mean for the Global Economy

1.2 Create Agile Processes & Optimize Your Workforce

Given all of the above is likely to place stress on finances, this might be a time to critically evaluate whether you can do more with less.

TIP: Evaluate your Operational Maturity

In times of crisis, leadership focus will shift significantly from normal day-to-day operations. How you did something yesterday may not be relevant today, especially if you are forced to create a remote team overnight. In order to ensure processes are agile during a crisis, organizations will need to evaluate their operational, or functional maturity. The process of highlighting operational weak spots and cross-functional friction can surface opportunities for improvement that will ensure business is not negatively impacted. When assessing functional maturity, focus on processes that your team owns or participates in heavily, as they will have the most impact.

Good questions to ask include:

→ **Which processes will yield the greatest returns by undergoing a process improvement exercise?**

→ **How much effort/resources/ time would it take to get processes where they should be?**

→ **Where might external resources be needed?**

→ **Where does your organization have too many resources, energy or effort?**

Tools

Resources

ProfitWell
Outcome-centered products that reduce churn, optimize pricing, and grow your subscription business end-to-end.

7 Agile strategies for managing remote teams

Stripe
A software platform for running an internet business.

Custify
Reduce Customer churn and grow revenue.

1Password
Save your passwords and log in to sites with a single click.

1.3 Maximize Team Output &/or Reduce Headcount

TIP: New operating climates, such as those being experienced with the coronavirus pandemic, present an opportunity for organizations to review how their business functions and the effectiveness of their current operating model.

This type of assessment allows you to identify near term opportunities to manage resources, while positioning yourself to be ready for future market shifts. Reducing your staff may be a decision you'll need to make. However, organizations that have done reductions without understanding and reviewing how work is done, could find themselves in a worse situation than before. t

Here are some questions to ask in order to help you determine your options:

→ Duplicated Work
When work is siloed, it is oftentimes duplicative. Are there processes that are being duplicated by multiple teams/employees? Do you have embedded functions siloed within a team? Can business functions and processes benefit from simplification? Can you centralize those business functions? Can a shift in resource allocation or ownership improve effectiveness?

→ Align to Strategy
Resources can be aligned to outdated strategy and should be redeployed on mission-critical work. What current business functions or processes do not align with your organization's strategy?

→ Focus on Core Activities
Identify what your critical "core" work is – the work that only your employees can and should do. What work is not "core" work? Are there partners, vendors, contractors that could do that work for you in a way that allows you to manage costs differently?

→ It's Tough, Be Human
If there is a need to reduce your workforce, be as honest as possible ASAP. How can you stay connected to employees you would like to have return in the future? What are the risks of each role leaving and how do you best mitigate the risk? How can we treat people with respect and have them leave well?

Tools

Functionly

A work design platform that provides the tools and visibility you need to lead transformational change. Analyse functional gaps, assign responsibilities, export real-time Job Descriptions and more.
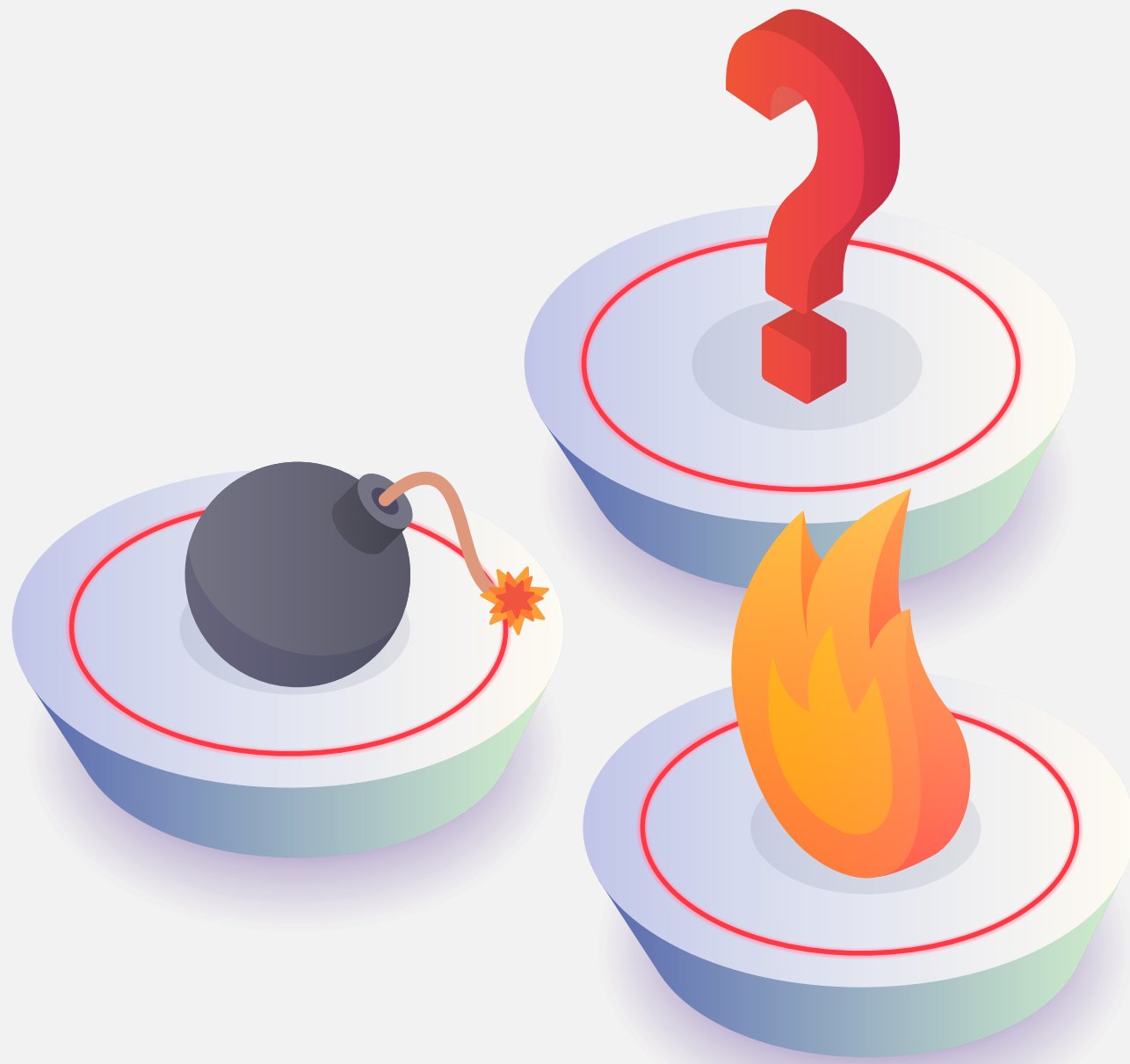
Process Street

Simple Process and Workflow Management

Resources

Employment Downsizing and its Alternatives

Maximize Team Output

1.4 Culture-Focused Crisis Management

TIP: Your most important tool in your toolbox during a crisis is communication. Your priority should be to reduce anxiety in your staff.

During times of stress, employees look to their leadership team to keep them informed, translate what the impact means to the organization and employees, and to create a plan for the way forward. But, what do you communicate and how do you frame the messages when there isn't a "playbook" for the crisis you're in? Consider some of the following approaches:
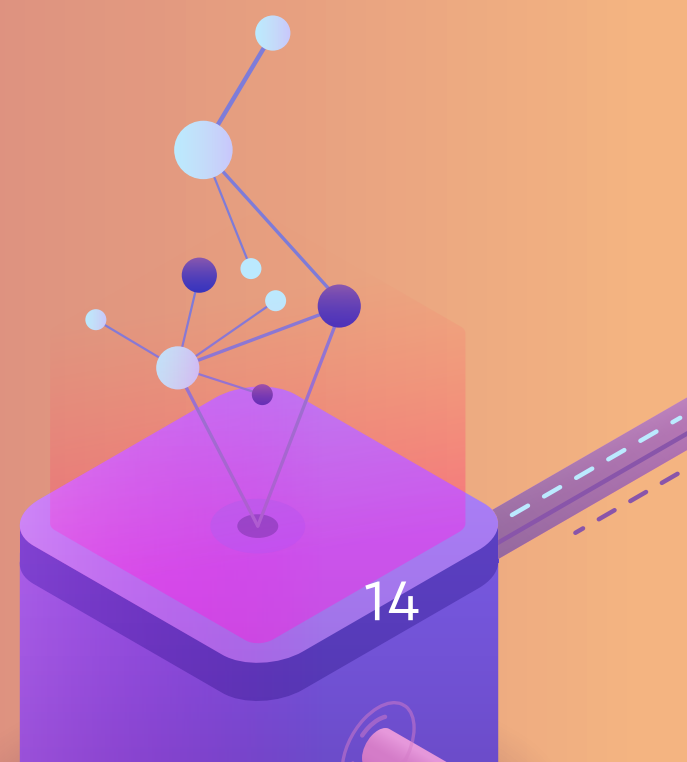
→ Communication

Create a regular channel to update employees – even if the update is "no new news". Remember, your job is to reduce anxiety, not add to it.

→ Transparency

Try to be as transparent as possible and take steps to limit inaccurate information, speculation and fear. If the way your organization works needs to change, keep employees informed and include the "why". It's important to give employees clarity on their work even when the work shifts quickly.

→ Digital Channel

Create a channel for employees to send in concerns, questions, ideas.

→ Two-Way Communication

Encourage your employees to be transparent with their personal travel or health.

→ Community

If remote working is new to your organization, how do you make in-person rituals virtual? (e.g. stand ups, coffee time, etc.) See our tips here.

Tools

Hey Taco
Lightweight Slack Plugin encouraging employee engagement and gratitude

OfficeVibe
A simple platform that helps managers to enhance performance, leaders to understand their people, and organizations to thrive.

Resources

Lead Your Business Through the Coronavirus Crisis

The Startup Foundations Builder Newsletter

Embracing Remote Culture Part 1: Understanding the Impact of Remote Work

Part 2

Steps to Transition Your Traditional Office to Working From Home / Remote Overnight

Are you planning to transition your traditional workforce to a distributed remote team due to the Global Pandemic COVID-19? As an organization that has been distributed from day one, and has staff operating across eight different time zones, we thought we'd share some strategic initiatives to help you get started on your transition.

The contained steps are outlined to assist your executive and HR teams in the transition to being an effective remote workforce.

Best working from home practices for organizations, team leaders and employees can be found <u>here.</u>

2.1 Evaluate Operational Efficiency for Maximum Team

How you previously operated in-office may not be relevant or efficient to your work as a remote team. To ensure processes are agile during a transition to remote work, you will need to evaluate operational, or functional maturity.

The process of highlighting operational weak spots and cross-functional friction will surface

opportunities for improvement to ensure your business is not negatively impacted. Gaps in processes, or duplicated responsibilities within organizational processes, cause huge issues across modern teams.

In order to evaluate your organization's functional maturity, you will need to focus on processes that your team owns or participates in heavily, as they will have the biggest impact.

Good questions to ask are:

→ **Are there processes or activities that are unnecessarily duplicative?**

→ **Do you have embedded functions within siloed teams? Are there manners to centralize those business functions?**

→ **What business functions and processes would benefit from simplification?**

→ **Read: <u>4 steps to evaluating operational efficiency and effectiveness here</u>**

2.2 Establish Your Remote Software Platforms

See our list of tools for remote teams/organizations here.

→ **Create Digital Workspaces**
Create a dedicated virtual community for your people, and individual teams. A lot of organizations will already have tools such as Slack set up for instant communication, which can easily be utilized for remote work. If you don't have virtual communication channels set up, evaluate the benefits of using Slack, or research alternatives that may suit your organization.

Pro Tip: Set up a handful of daily rituals like checking in and sharing blockers, but also make sure you include announcements, celebrations, employee recognition and knowledge sharing. Each team, pod, squad, and large projects should have their own communication channel to reduce the noise for other employees.

2.3 Set Remote Work Schedules

Strategically, you will need to set schedules for the whole organization, or let teams define it for themselves. Cross-reference your work policies and standard employment contracts to ensure you're not breaching any of your own policies before you announce any changes or expectations.

2.4 Support Remote Workspaces

Consider providing a stipend to cover the cost of Wi-Fi and other home office expenses. Everyone on your team will have different needs for space and work environments. Not everyone will have a home office set up for remote working, and you may need to prepare some informative guidelines around healthy home office setups. Think ergonomics, natural light, work away from sleeping areas, etc.

You may find some team members will struggle with the lack of peer-to-peer interaction. If skeleton staff at an office is not an option for your organization, other alternatives include coworking spaces or coffee shop meetings.
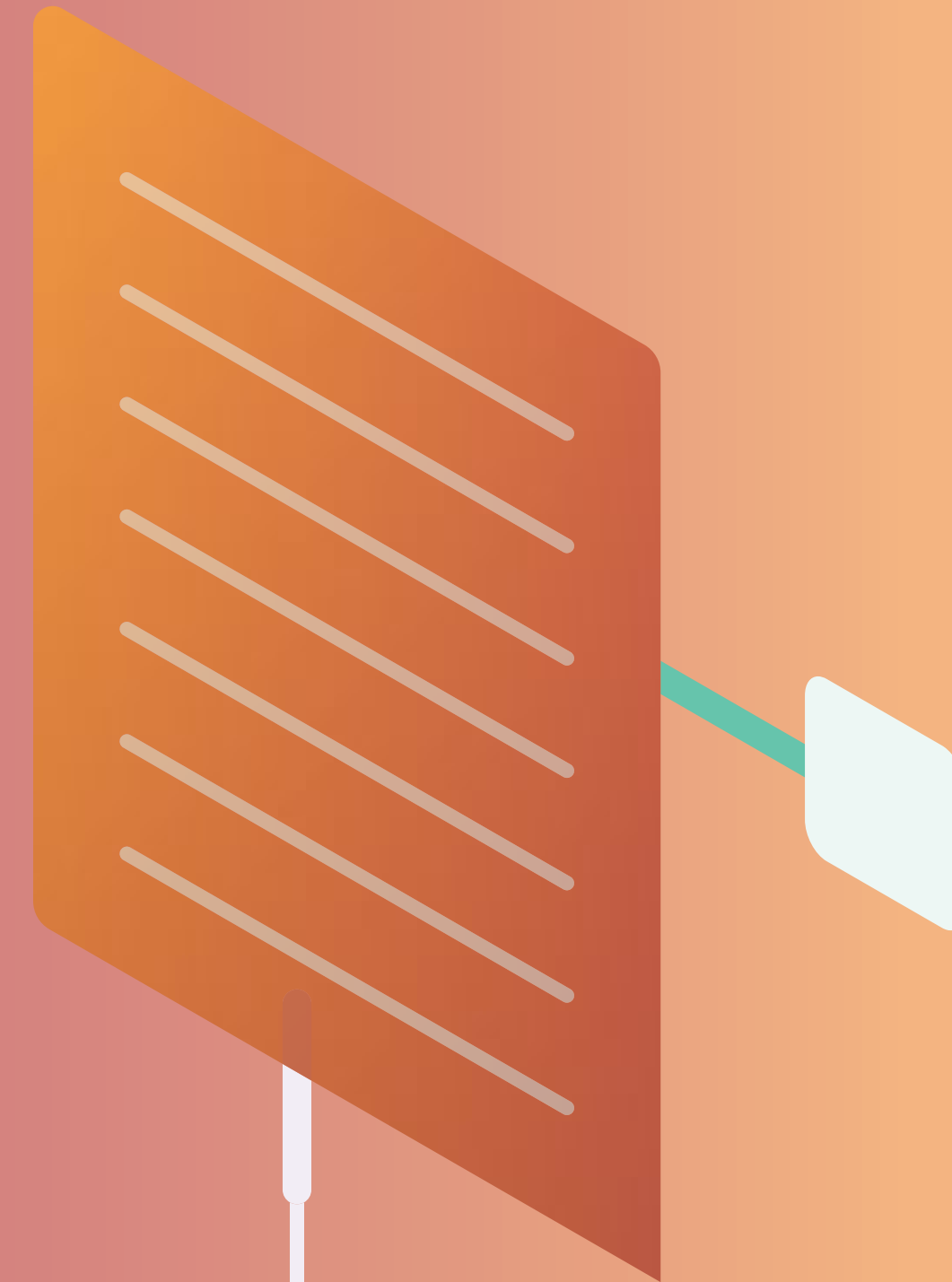
2.5 Establish Expectations for Team Leads

When working in close proximity in an office, it's easy to have insight into what your team is working on. When you transition to working remotely, you will lose spatial proximity which makes it easy to do a quick face-to-face check-in. Your organization will need to make sure there is a process aligned to share and track responsibilities, and communication tactics for expectations around

transparency and accountability of tasks (e.g. how should your team communicate progress upwards? Do you establish daily team meetings?). These expectations will need to be easily understood and accessible online for quick reference.

2.6 Establish Expectations for All Staff

Having every team understand their mission and accountabilities is great, but when you transition to a remote workforce, it is important for all employees to clearly understand their responsibilities and how they fit in the team. Most organizations will use traditional Job Descriptions (JD) and/or an Org chart to establish a shared understanding of who does what. However, Functionly

understands that in most companies the common JD has never been updated or reviewed since the employee began. Therefore, we suggest having a conversation with each of your team members to be sure everyone has clear documented responsibilities. If you think managing people in the same room is challenging at times, going remote adds a whole new level. Remote working has a tendency to decrease clarity of understanding around each team member's role and contribution to the team.

2.7 Remote Meetings

Select a provider. Google Hangouts, Zoom, etc.

→ **Teach the technicals**
There will be technical challenges for our staff. You need to give time, and plenty of guidance on how to get set up with tools and technology.

→ **Teach (and model) the importance of consistency & etiquette**
You need to create content and guides specific for your organization. This could include meeting etiquette like: all meeting attendees must be on camera, mute when not speaking, avoid background noise, make sure the meeting isn't 100% business, or allocate time for catching up and chatting about non-work activities.

→ **Set ground rules**
After a few minutes of catching up, the meeting leader should set ground rules about what the format will be, when to speak, and how to contribute, so people don't try to talk over each other, and everyone will have a chance to contribute.

→ **Record content**
A lot of virtual meetings could be recorded and shared with other team members if you wanted to make the content all available afterwards.
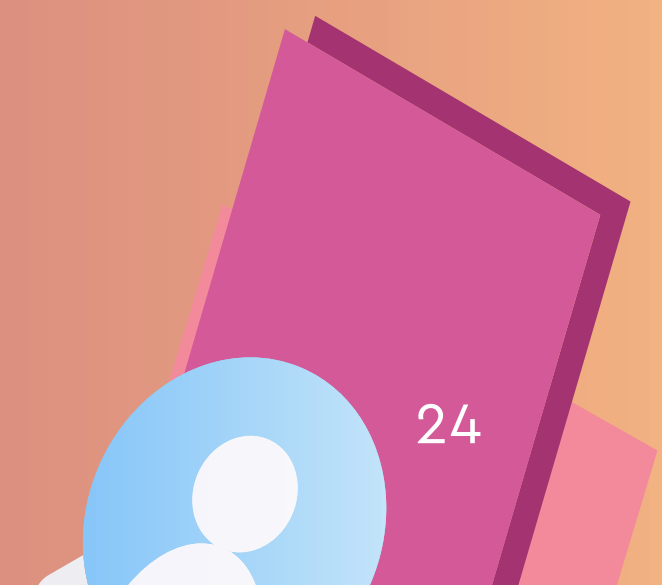
2.8 Bring Team Together for an Onsite/Internal Conference

If you end up making the permanent switch to a remote workforce, you will need to think about bringing your people together. Consider an all team conference at least every 12 months, or even more frequently to ensure your teams stay connected and aligned to your organization's vision and strategic initiatives.
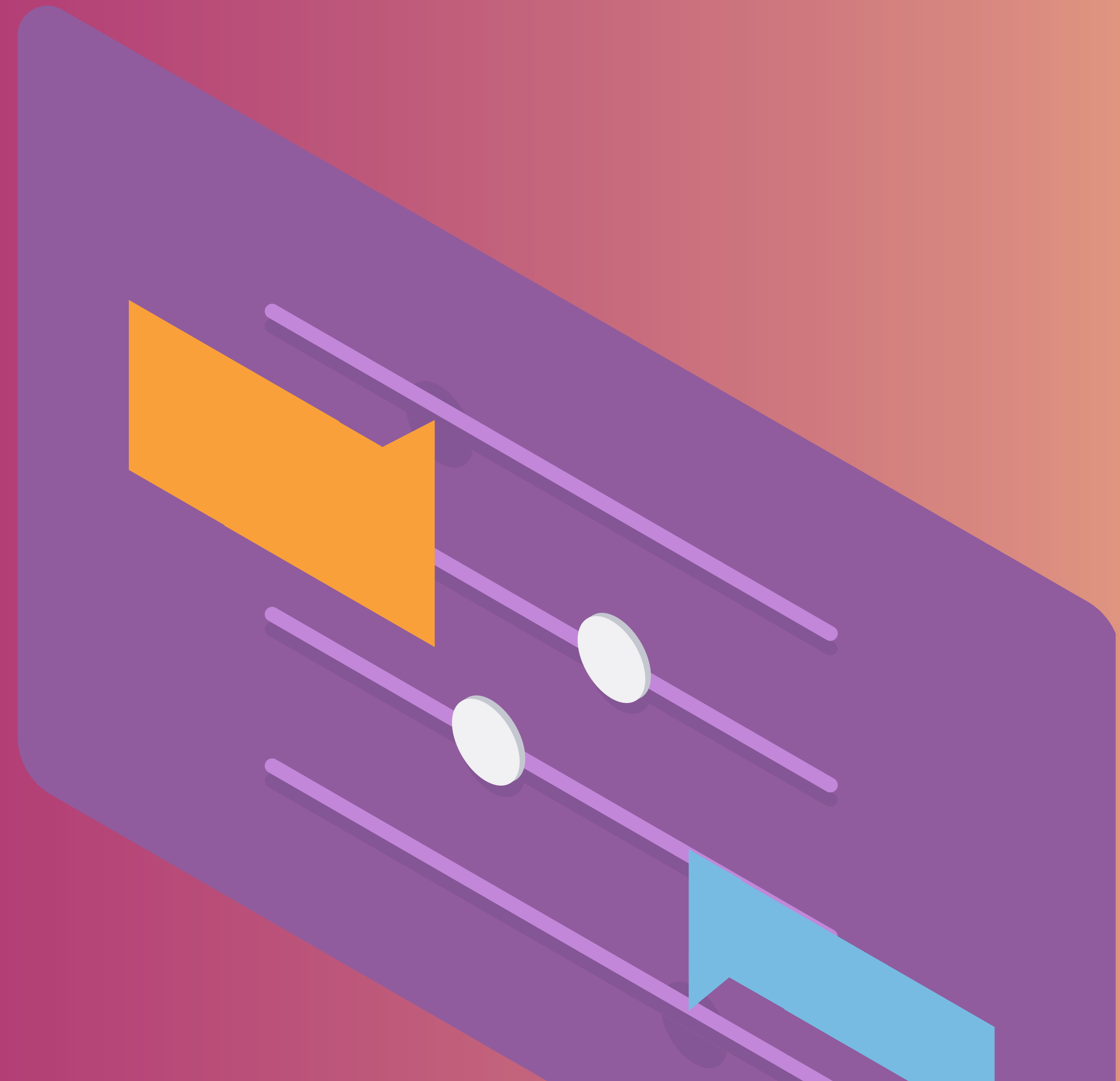
Part 3

Tips, Tricks & Tools
for Any Remote
Organization
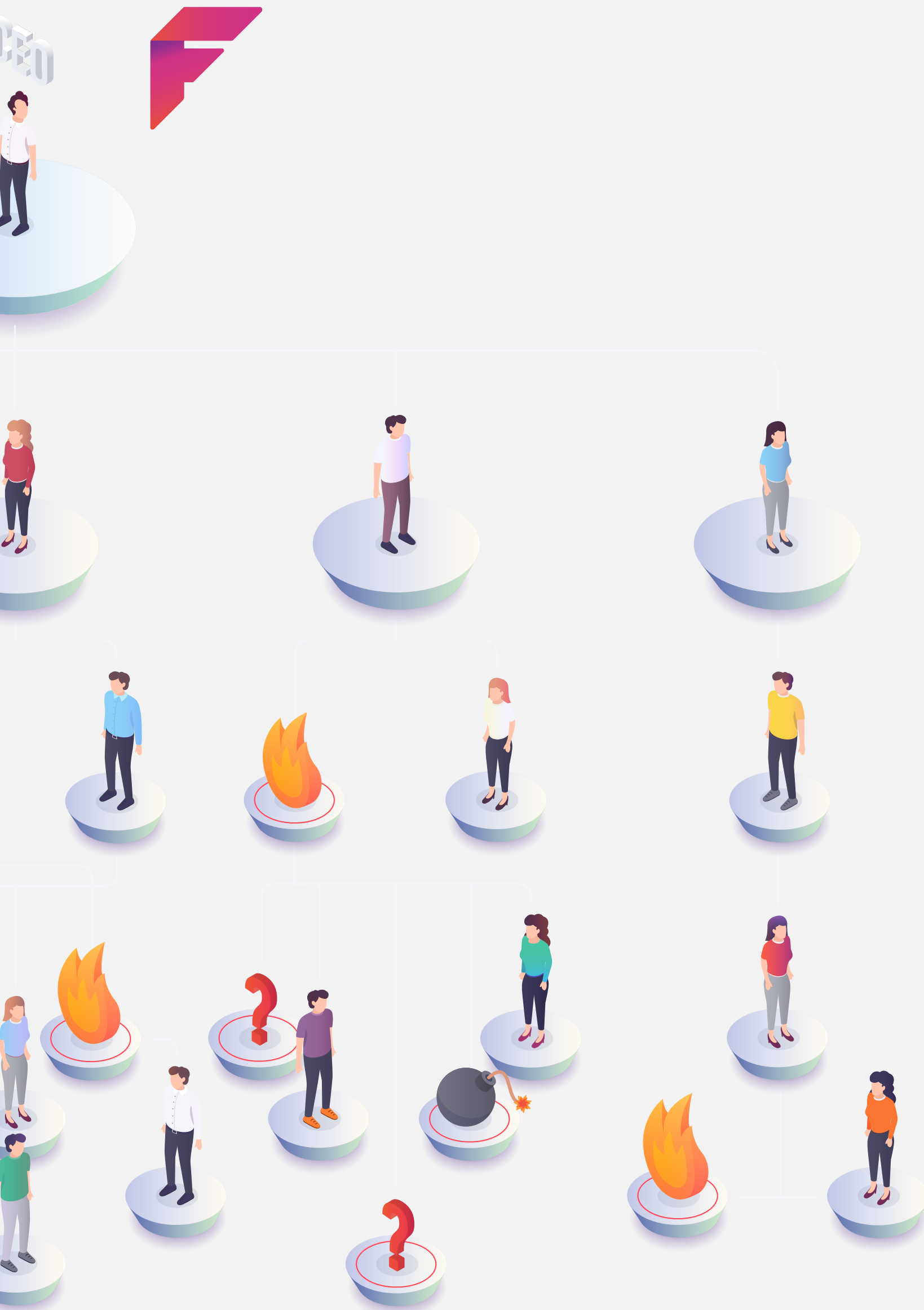
Did your workforce become remote overnight!? As an organization that has been distributed since day one, and has staff in 8 different time zones, Functionly is here to help! See below for our tips, tricks, and tools to help you and your organization transition to an effective remote workforce.

"The future of Performance Management lies in placing ownership in the hands of employees and teaching managers to coach rather than police."

– Denison Consulting

3.1 Remote Personnel Management Output

Transparency & Accountability
The number one reason why organizations hold off on working remotely is the lack of transparency and trust. "Intentional Transparency," – a phrase coined by Victor Wu – is one of the best ways to counter those feelings of doubt and fears associated with trusting staff to work remotely. He says, "Information/status in your

business should be accessible self-service, on-demand. [...] Modern tools make it easy to work and serve on-demand status at the same time." Remote teams only work well if they can trust each other completely. Set a timeline for every commitment made, communicate progress and hold each other accountable.

Team Meetings
Have a daily team virtual "stand-up" to share priorities for the day. Check-in again at the end of the day and share roadblocks/challenges to any priorities.

Communication
Communicate often and publicly. It is impossible to over-communicate in a remote organization. Try to communicate how others need you to communicate – especially when it comes to projects and deliverables.

→ Don't Micromanage

The best way to measure work is based on individual or team output. Communicate expectations and manage a shared list of tasks and expectations, not hours worked.

→ Use Emoticons

Emoticons are really important when staff cannot see facial cues. The burden is on you to make sure people understand your brand of humor (or lack thereof).

→ Constructive Feedback

If you have constructive feedback to give, do it over a video call. Virtual communication gone rogue can breed misunderstandings and hurt feelings.

Tools

Confluence
A team workspace where knowledge and collaboration meet to achieve great things.

Flare
Eliminate manual HR administration, increase onboarding efficiency, and improve employee retention.

TimeDoctor
Track time and watch your productivity soar!

Toggl
Free and simple time tracking. Powerful reporting.

Resources

Buffer: The 2020 State of Remote Work

How to Manage Teams When Working Remotely

3.2 Remote Project Management

Tools
Choosing the right project management tools can either super power your team or stunt their efforts. You probably already have a number of systems in place within your toolbelt to power your team to work collaboratively while being distributed. Most organizations already have deployed a set of cloud solutions to work across remote environments.

Operational Processes
Let these systems do the hard work, but tweak your internal processes to serve as the single source of truth for task updates, account information, project status or as a workforce community. Having lightweight frameworks that lean into the existing tool system automation is critical for setting up your team for success.

Task Management
Task management is the core of effective remote project management. Ensure there is alignment in common goals or current projects,

Tools

Accelo – Cloud-based software that manages all client work in one place, making business more profitable and less stressed.

Airtable – All-in-one collaboration platform. Part spreadsheet, part database, and entirely flexible, Airtable gives you the freedom to arrange your work just the way you like.

Asana – Work management platform to stay focused on goals, projects, and daily tasks that grow business.

Dropbox – A modern workspace designed to reduce busywork-so you can focus on the things that matter. Sign in and put your creative energy to work.

Slack – Real time messaging, file sharing and powerful search.

Google Docs – Brings documents to life with smart editing and styling tools to help you easily format text and paragraphs.

Google Drive – File storage and synchronisation service.

Lucidchart – Online Diagram Software & Visual Solution

Monday – Work OS that powers teams to run projects and workflows with confidence.

ProductBoard – Get the right products to market, faster.

Smartsheet – A cloud-based platform that allows organizations of all sizes to plan, capture, manage, automate, and report on work across the business, empowering you to move faster, drive innovation, and achieve more.

Sococo – An online workplace where distributed teams come to work together each day, side-by-side.

Trello – Trello's boards, lists, and cards enable you to organize and prioritize your projects in a fun, flexible, and rewarding way.

Unblocker – Understand how you work and act on missed tasks across all meetings, chats, and collaboration tools

Workfront – Teams have one central application platform to share ideas, create content, manage complex processes, and do their best work.

Wrike – Cloud-based collaboration and project management software that scales across teams in any business.

Zoho – Cloud based project management solution that scales with your team

3.3 Remote Teams

"I guess we're about to find out which meetings could have been emails after all." – Unknown.

Technology makes it easy for business to continue as usual. Some tools, however, can mask the intention and humanity of the people involved. Best practice says that unless every person is in the same physical room, all meetings should be held over a video call.

Teach the Technicals
There will be technical challenges for your staff. Make sure to give them time, and plenty of guidance on how to get set up with your tools and technology.

Teach Etiquette
Create content and guides specific for your new virtual workplace rather than relying on the tools help docs. This could include meeting etiquette such as; all meeting attendees must be on camera, mute when not speaking, and avoid background noise.

Set Ground Rules
Make sure the meeting isn't 100% business. Allocate time for catching up and chatting about non-work activities. After a few minutes of catching up, set ground rules about what the format will be, when to speak, and how to contribute, so people don't try to talk over each other, and everyone has a chance to contribute.

Record content
A lot of virtual meetings are recorded to make the content available to all after the event.

Tools

Google Hangouts
Meet face to face with coworkers and customers for free.

Jell
Daily Standups, Task Management & OKRs For Technical Teams

Run the World Today
Bring like-minded people worldwide together to accomplish great things.

Zoom
Modern enterprise video communications, with an easy, reliable cloud platform for video and audio conferencing, chat, and webinars

Resources

Running Awesome Company/Team Offsites/ Meetings

XPLANE's Top 25 Tips and Tricks for Remote Collaboration

3.4 Remote Culture Management & Development

"To win the marketplace, you must first win the workplace."
-Doug Conant, Rise

As humans, we naturally crave personal interactions. One of the key challenges that remote teams face is the sense of loneliness and lack of belonging. Creating a space and environment to intentionally

Happy teams = Productive Teams

As an organization, you need to be intentional in your processes, communication and team dynamics, and it must be valued and adopted from the top down.

Here are some of the key things we do to help develop a sense of connectedness when working remote:

→ Digital Workspaces
We have created a dedicated virtual community space. For announcements, celebrations, employee recognition and knowledge sharing.

→ Maintain Relationships
We're sure to encourage our team and set time aside to maintain relationships with our coworkers. It's very important that our interactions with our colleagues are not purely transactional.

→ Water Cooler
We utilize online "water coolers" for business and social communication.

→ Coffee Dates
We enjoy a virtual "Coffee" with our colleagues.

Tools

Hey Taco
Lightweight Slack Plugin
encouraging employee engagement
and gratitude

OfficeVibe
A simple platform that helps
managers to enhance performance,
leaders to understand their people,
and organizations to thrive.

Resources

Embracing Remote Culture
Part 1: Undestanding the
Impact of Remote Work

How to Embrace Remote
Work

Your Startup Can Help Fix
the Loneliness Epidemic

Help Your Remote
Employees Build Stronger
Personal Connections
Through Randomness

3.5 Work Schedules

"My hour for tea is half-past five, and my buttered toast waits for nobody." – Wilkie Collins, The Woman in White

Set a schedule, have a routine and stick to it.There will always be work to do. The lack of a physical office may result in staff being unable to easily transition from work time to personal time. This results in unbalance.

→ **Working Hours**
Set working hours for you and your team. Add your working hours to your calendar settings. Be sure to encourage your team to block out times to eat, and take breaks. Sometimes those little nudges will help them remain in balance.

→ **Prioritize Your Health**
Make sure to set time to take care of yourself. Schedule time to do what you love, but also for important appointments.

→ **Stay on top of all notifications**
There's no need to reply immediately, but make sure you're checking platforms a couple of times a day. This doesn't mean you need to react to everything, we know not everything can be done instantly, but be sure to respond in a timely manner clarifying what you will do and when.

Tools

Workflowy
 – Super simple, yet powerful to-do list management
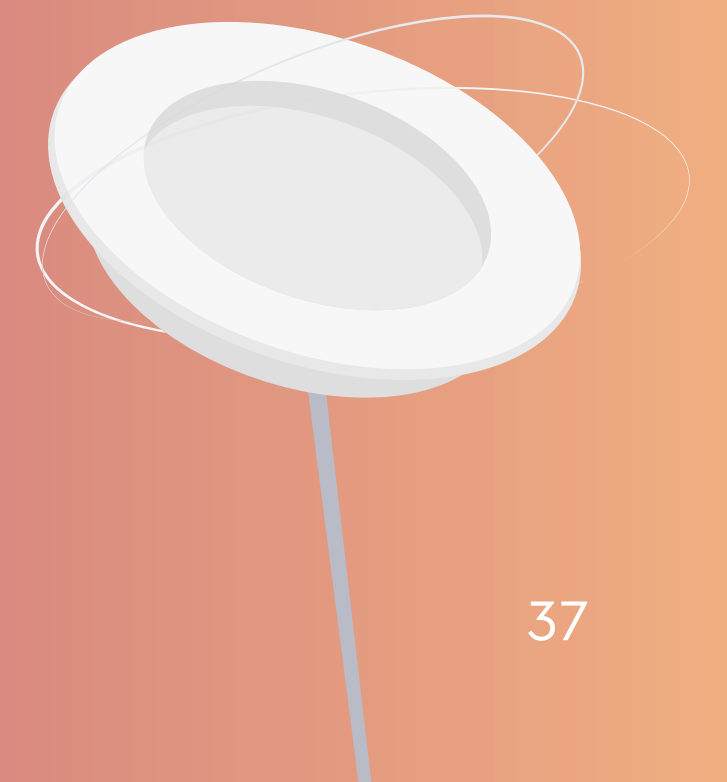
3.6 Remote Workspaces

"Never work from bed [...] It becomes more difficult to fall asleep because working from bed weakens the mental association between your bedroom and sleep."
– Hailley Griffis, Future of Work Marketer, Buffer

Some organizations provide great workspace benefits like a monthly stipend for supplies, or ergonomic desk and chair. If your organization does not provide stipends to help you have a great workspace, there are home office tax deductions you can apply for.

We have compiled a list of what you might need to build a great remote workspace:

⟶ Space
Try your best to have a space at home that is dedicated for your work. Avoid working in a place where you frequently rest. Sometimes it's good to work in communal locations to get that human interaction (i.e. coffee shop). Don't be afraid to mix it up!

⟶ High-Speed Internet
If you're going to be a successful remote worker, the most obvious and important piece of equipment you'll need is a computer with high-speed internet access. To get your work done efficiently, and without interruptions, it's essential to have the fastest and most reliable internet available in your area.

⟶ Workstations
You need a great computer that has a fast processor, adequate disk space, and plenty of RAM. Unless you're paper-free, you'll need a printer/copier, printer paper and scanner. For desk supplies, you might need pens, pencils, highlighters, sticky notes, journals, a stapler, staples, scissors, paper clips, rubber bands, and potentially binders, a file cabinet and filing folders.

⟶ Security
To protect your online activity, a VPN is a great way to reassure your employer/employees that internet security is taken seriously. This doesn't mean you need an expensive VPN, there are a lot of free VPNs out there.
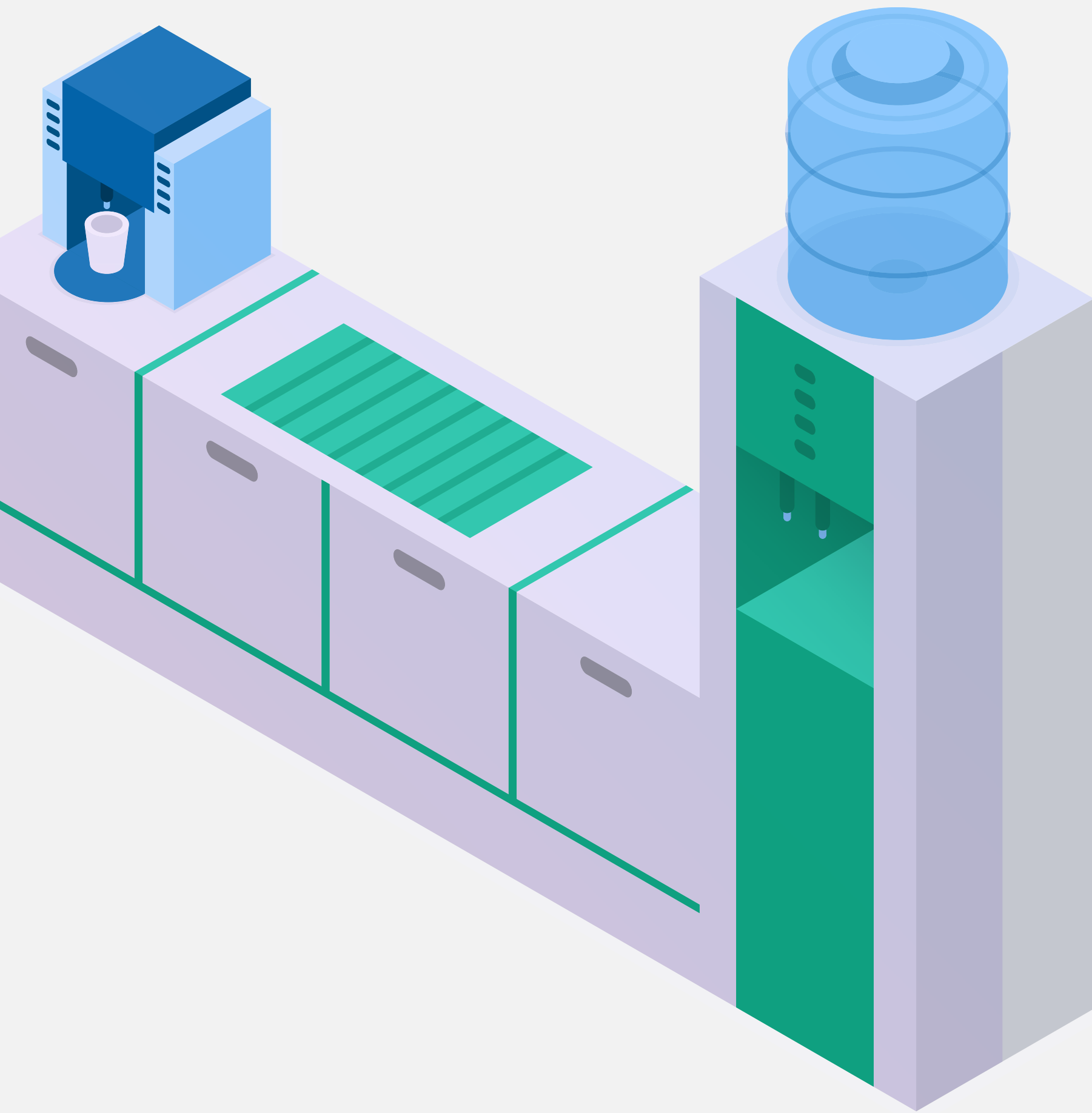
Tools

Facebook Workplace
Empower and transform your whole business, with familiar features like groups, chat and video calls.

Facebook Feed Eradicator
Chrome extension to replace your FB Newsfeed with motivational quotes.

SpotFlux VPN
SpotFlux VPN's Free plan is a great one to try if you're just starting out.

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About F Functionly
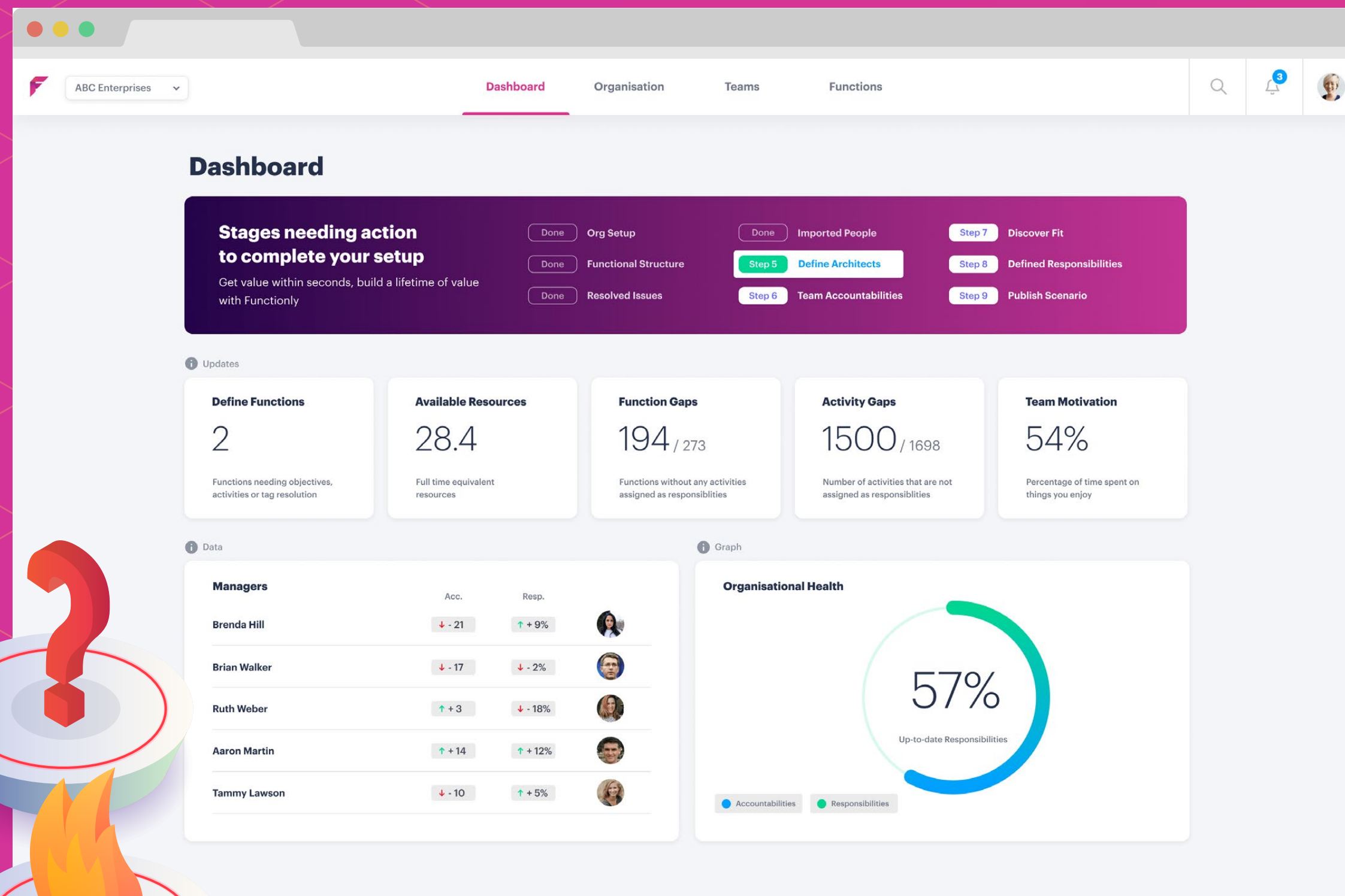
Functional Insight Tools

Gain a deeper understanding and give your leadership team real time data on where energy, motivation, and functional gaps exist across your business. Empower your leaders to make informed decisions, enhance performance, and create an aligned work environment.

- Functional Chart
- Dashboards
- Org Chart Builder

2.

Operational Alignment Tools

Ensure the right things are worked on by the right people and at the right time. Use insights to guide resource allocation and set job responsibilities in a real time framework that is up to date.

- Job Landscape
- Team Accountabilities
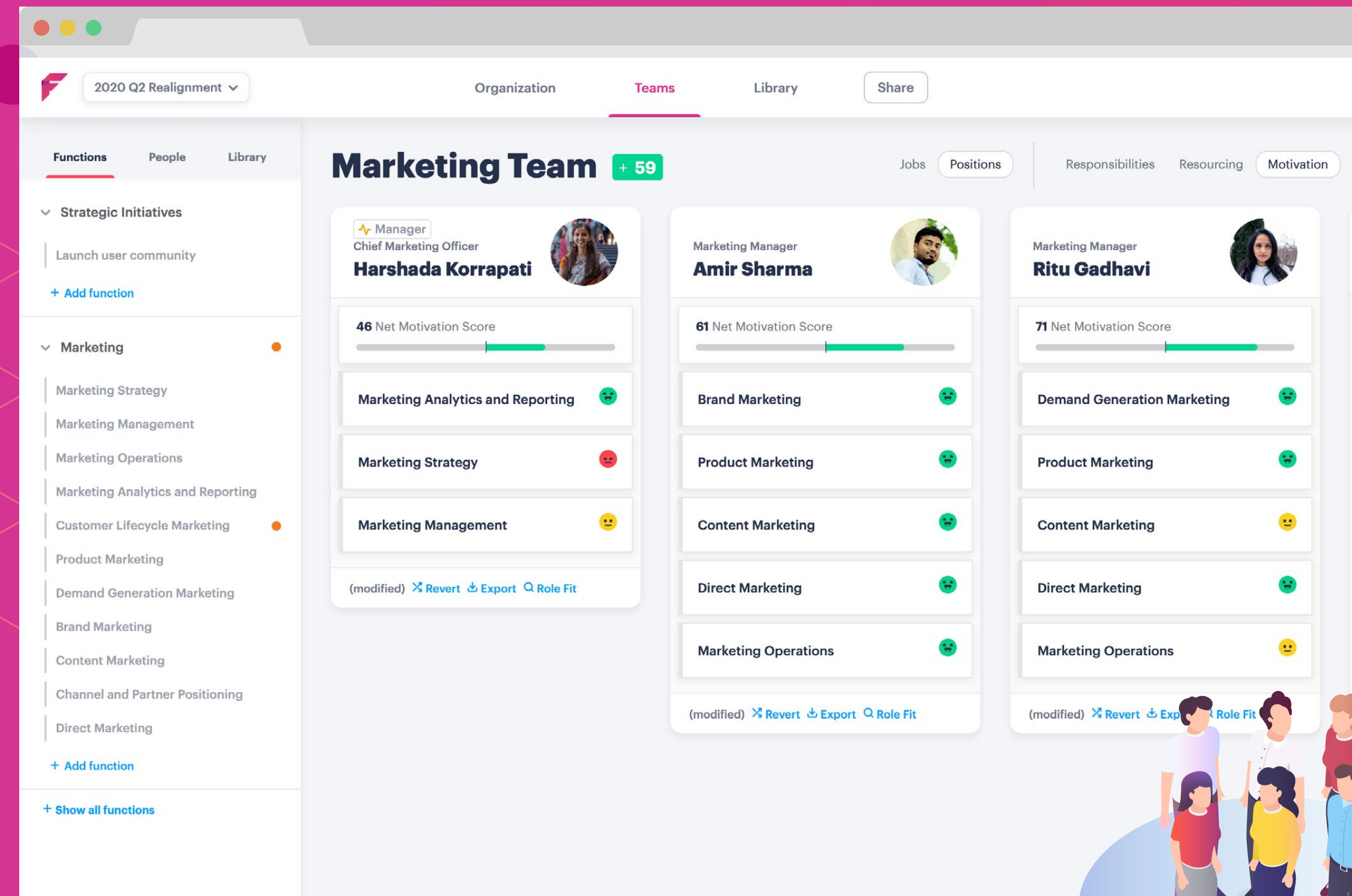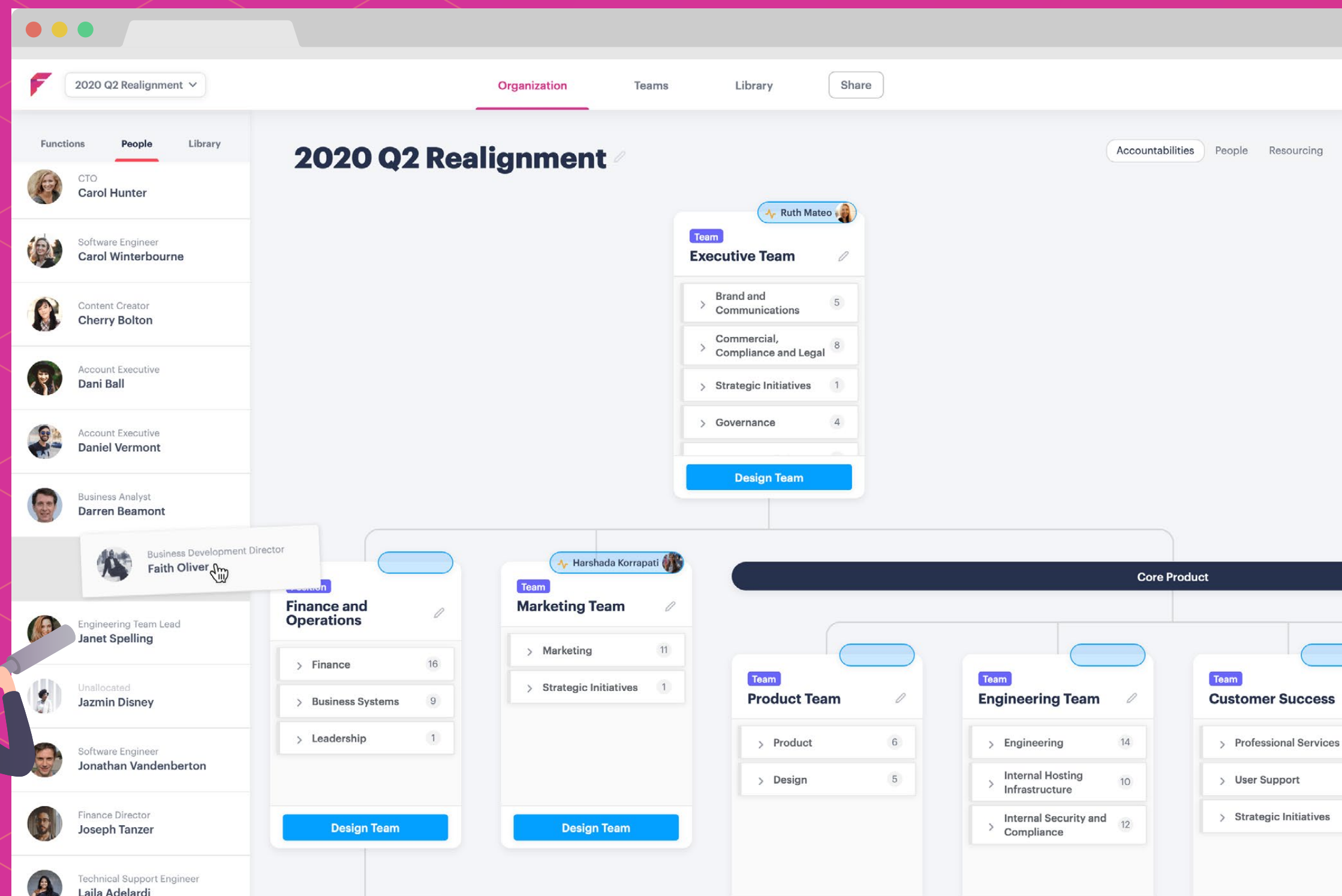- Responsibility Assignment
- Functional Library
- Job Description Exporting

2020 Q2 Realignment ⌄

Organization   Teams   Library   Share

Functions   People   Library

Marketing Team + 59

Jobs Positions   Responsibilities   Resourcing   Motivation

⌄ Strategic Initiatives

Launch user community

+ Add function

⌄ Marketing ●

Marketing Strategy
Marketing Management
Marketing Operations
Marketing Analytics and Reporting
Customer Lifecycle Marketing ●
Product Marketing
Demand Generation Marketing
Brand Marketing
Content Marketing
Channel and Partner Positioning
Direct Marketing

+ Add function

+ Show all functions

⭐ Manager
Chief Marketing Officer
Harshada Korrapati

46 Net Motivation Score

Marketing Analytics and Reporting

Marketing Strategy

Marketing Management

(modified) ✕ Revert ⬇ Export 🔍 Role Fit

Marketing Manager
Amir Sharma

61 Net Motivation Score

Brand Marketing

Product Marketing

Content Marketing

Direct Marketing

Marketing Operations

(modified) ✕ Revert ⬇ Export 🔍 Role Fit

Marketing Manager
Ritu Gadhavi

71 Net Motivation Score

Demand Generation Marketing

Product Marketing

Content Marketing

Direct Marketing

Marketing Operations

(modified) ✕ Revert ⬇ Exp... Role Fit

About **F** Functionly

Work Design Suite

Build the most effective organizational structure and resource the most efficient teams. Easily click to build a more energized and satisfied organization by creating new levels of connection with your people and 10x alignment. The Work Design Suite is the ideal place for planning the future of your organization.

- Org Scenario Designer
- Team & Role Design
- Custom Job Template Library
- Headcount Planning

Functionly

Thank you.

See Demo →

Visit **functionly.com**
Email **hello@functionly.com**

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