

The remote work playbook



Introduction

The pandemic caused by Coronavirus Disease 2019 (COVID-19) has dealt a severe shock to the world. As we write this, we've seen rapid switches from hopes of containment to a regime of aggressive social distancing. As a result, many organizations are being forced to transition to remote working, and at a pace much faster than any sensible person would recommend.

At Thoughtworks, the last two decades have allowed us to gain experience in remote working at a rather more leisurely pace. We've set up many cross-continental development teams, and we run most of our business with global teams. Many of us are used to working more from our home than any single Thoughtworks office.

We've put together this document to try to pass on what we've learned, in the hope it will be useful for those hurtling down that path now. However, it is important to stress some points before we begin. Bear in mind that, when any experienced remote worker gives advice, that they (and we) were able to adopt remote working in more relaxed times. That's a very different context to the rapid measures needed now, and nobody knows how that different context affects the advice we've given.

We should also recognize that there are other factors that make the current circumstances different to those we're used to. School closings mean that children will be home and have to be looked after. People with vulnerable family members will need time and energy to look after them. And those without such responsibilities will still be affected by uncertainty and the worry that COVID-19 carries with it. As such we should expect less effectiveness and productivity than would normally be the case with remote working.

Despite these caveats, we still think many of these recommendations will be useful and we hope you find this document valuable. If you have questions, or want some additional support, please get in touch with your client service team.

One last thought. An event like this is not just a crisis to manage, it is also an opportunity to rethink established ways of living and working. While the short term is about coping with the immediate effects, in time companies can explore new ways of serving their customers and organizing their work.



Martin Fowler
Thoughtworks Chief Scientist

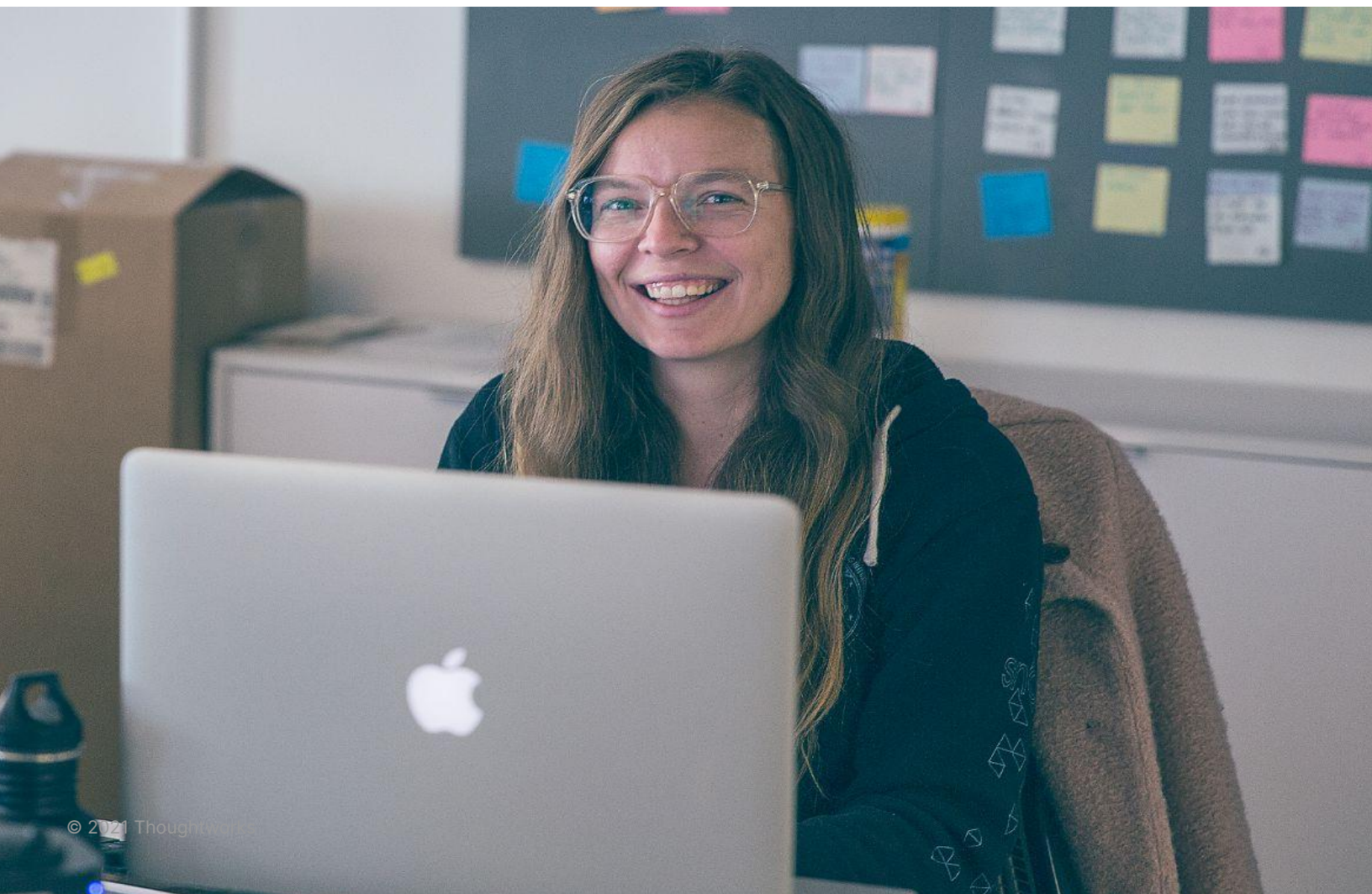
Where to begin

Standing up your workforce remotely, especially when unplanned, can feel like an overwhelming task.

From tech logistics, to morale, to day-to-day activities, we have created this helpful reference guide, to help you navigate your transition to remote-working.

By addressing the core elements required to get started, we'll show you how to make remote work effective, enjoyable and sustainable for your organization.

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Accelerated timeline to “go-remote”

Stage 1

- Prioritize ‘must-have’ infrastructure such as VPN and communications tools such as headsets, video cameras and conferencing software.
- Ensure access to critical services is available remotely, including source control, build pipelines, and dev/test/prod environments.
- If your country hasn’t already moved into lock down, do a ‘remote-trial’ day as soon as possible to discover any limitations or challenges, then aggressively pursue fixes or workarounds.
- For team members able to work remotely, immediately extend their remote trial into full remote working.
- Begin ‘social distancing’ measures for any remaining co-located team members. Evaluate health vulnerability of all team members.
- Set expectations with stakeholders. This is not a normal transition to remote working. It is being done in a hurry, in a climate of worry and stress. Teams will adjust, but it will be rocky to begin with.
- Follow advice from local authorities on any further measures that are appropriate.

Stage 2

- For teams that still require co-location, split into physically isolated blue / green sub-teams to reduce the chances of full team risk exposure.
- Begin focusing on ways of working and establishing remote-first social norms for the teams.
- Schedule training with remote collaboration tools, especially those used in larger meetings such as iteration planning, showcases and retrospectives. Conduct meeting trial runs.
- Reallocate resources to assist your helpdesk.

Stage 3

- Migrate fully to remote work.
- Conduct stakeholder management check-ins to assess communication effectiveness and productivity.
- Conduct retrospective with the whole team, and use 1:1 feedback mechanisms to identify any blockers or challenges.
- Identify actions to address the issues raised, and pivot as needed.

Stage 4

- Organize social activities for the team, such as virtual coffee, lunches, or drinks, or facilitate a remote ice-breaker game.
- Continue to check in with stakeholders and to iterate over ways of working.

Remote infrastructure

First and foremost, before remote working can begin, organizations need to ensure that their people have the necessary technology and hardware infrastructure in place to support core operations.

What's needed

Item	Description	Suggested tools and practices
Hardware	Laptop, monitors, webcam, mic and speaker setup that works well enough for team collaboration.	Laptop + Earbuds with noise cancellation
Internet access	All team members have high-speed internet access at home and, ideally, a backup for internet access (e.g. ability to tether to cell phone and use data mobile plan.)	Policy in place to reimburse home internet expenses
VPN	Set up VPN, if required. Access has been tested and works well from home. Backup plan in place if VPN fails (e.g. download the code if source control is unavailable.)	
Security	Process in place to meet security requirements (e.g. request access, user ID etc) remotely. Team members are not relying on teammates for systems access.	Hard drive encryption, device hardening, SSL, MDM, Password managers, Multi-factor authentication
Source control	The team can log on and use the source control tool (e.g. GitHub works on VPN.) Make sure all your privately hosted services are available over your VPN.	GitLab, GitHub
Build pipelines and automation	The team can access and run the build and automation tools effectively.	CircleCI, AWS CodePipeline, Google Cloud Build
Environments	Team members can access test environments and databases remotely. Production support can continue remotely, including access to logging and monitoring, deployments. Team is not single-point sensitive to accessing environments.	
Help desk	If using a help desk regularly (e.g. reset password, access systems), make sure data is up to date.	Zendesk, Jira Service Desk, Freshdesk

Virtual Communications

Virtual communication and collaboration can be really challenging, especially when you are first setting up your remote model. Quickly establishing accessible collaboration tools and common virtual communication processes is a critical component for remote working success.

What's needed

Item	Description	Suggested tools and practices
Chat	There is a single chat room tool that the whole organization is using to collaborate and share information. Teams or smaller groups can set up work spaces for specific purposes. The team has set up channels / groups for social interaction and team / department announcements and notices.	Google Chat, Zoom Chat, Slack
Shared workspaces	There's a single place for teams to share project content, including but not limited to the output of problem solving sessions, documents, presentations and the like.	Google Drive, Confluence Basecamp
Client meetings and showcases	A video conferencing tool is in use for client meetings, and showcases. Connectivity supports screen sharing for real-time collaboration and software demos. Record calls for those for may be unable to attend.	Zoom, Hangouts Meet, MS Teams
Team wall / Board	Electronic wall / board used for story wall, planning, prioritizing and scheduling stories, epics. Data in the tool is up to date. Every team member updates their status as stories move through the development cycle. There is a dashboard showing progress plan / schedule / delivery, velocity, backlog sizing, etc.	Trello, Jira, Monday.com, Kanbanize
Whiteboard	A whiteboard sharing tool is in use and will allow the team to collaborate in a similar way the way they usually make use of a physical whiteboard. Consider going lo-fi for quick discussions - draw on a piece of paper and send a photo!	Jamboard, Zoom
Retrospective	A Retrospectives tool is in use (or has been tested) by the team for retrospectives. The team has a board for retrospective action items. A video conferencing tool is in place for the team to discuss issues and process changes in confidence.	Trello, Monday.com

Virtual Communications

Continued

What's needed

Item	Description	Suggested tools and practices
Remote pairing	Teams choose a platform for pairing that allows them to be remote, while still being able to access a shared computer.	Zoom Remote Control, Tuple, TeamHub, Visual Studio Live Share
Code review	There is a code review tool in use in the case where pairing is not possible, reduced or impaired.	GitHub, GitLab
Phone contacts	There is a list of phone contact numbers for all team members and key partners. Team members have these numbers on their phone contact list so they can text or call if internet or tools fail.	Google Contacts, Updated company directories, Zoom Phone and Google Voice

Managing stakeholder expectations

Managing stakeholder expectations when teams are working remotely is essential to maintaining trust and confidence (this can be as true of internal stakeholders as it is of external). It is human nature to worry more about something we can't see or control than something we can. Instilling these principles into your remote work practices help to build and grow the strong relationships that are core to effective remote work.

What's needed

Item	Description	Suggested tools and practices
Trust	There are regular feedback sessions with stakeholders to understand, align and course correct where needed. In cases of low trust - communicate, communicate, communicate. Be transparent, keep electronic boards up to date, share dashboards, invite and answer questions.	1:1 feedback and check-ins, regular showcases, IM channels, Trello / Jira, regular video calls
Collaboration and transparency	The organization is open to, or already using, collaboration tools for documentation, presentations, planning and recording decisions.	G Suite, Microsoft Office 365, Trello
Risk management	There are regular risk management meetings with key stakeholders and/or program leadership. Consider moving these to a weekly cadence for the period of all-remote work.	Do these on video conference and prepare asynchronously in advance. Make risk logs visible to the whole team for collective ownership.
Communication and meetings	The daily, weekly, monthly and quarterly schedule of client meetings, reports and communications is formalized, documented and scheduled in calendars. Video conferencing details are included in the calendar invitations. Meeting summaries and/or recordings of call are shared so that all stakeholders are across updates.	Use the team's shared workspace to keep track of meeting summaries and track actions as part of the team board.
Over communicate	Daily progress report is shared with stakeholder(s) or client partner(s). It doesn't need to be long but maintains transparency and the sense of daily conversation, with the intent that any issues will be picked up within 24 hours.	Institute a daily touchpoint over VC. For overall responsiveness, consider the following graded approach Instant response - phone Minutes to hours - IM < 24 hours - email Follow up each of the above approaches with a VC if needed.

Way of working

Establishing a clear, comprehensive governance structure, and defined ways-of-working provides transparency and guidance to teams, ensuring that everyone, regardless of their role and location, is aligned to new processes and mechanisms for working together remotely.

What's needed

Item	Description	Suggested tools and practices
Planning and scheduling	Story sizing / estimation process is functioning and stabilized. Sprint planning or Kanban process is in place and functioning as intended. Story prioritization and story writing processes are in place. Team can depend on flow of stories ready for the next 2 weeks sprint, or meeting Kanban WIP limits in 'Ready for Dev'.	Trello / Jira and Zoom
Technical	Architectural guidelines are sufficient for a distributed team. Team has diagrams, guiding principles, documentation to help team members stay true to the vision and agreed approaches. Pair rotations are working and supportive of onboarding new team members. Team has daily tech huddle and weekly mob code sessions that can be continued with all-remote team.	ADRs, Collaborative architectural diagrams using Google Drawings or Draw.io Tech Huddles using online whiteboards
Performance	Velocity - is established and forecast delivery is closely monitored. Cycle time - is being tracked and is used to actively improve processes. Automation - CI Pipeline and test automation suite are running smoothly and giving the team reliable feedback. Nothing is commented out or skipped.	
Standup	Daily stand-up meeting is tactical (not just 'what I did yesterday'). Use a 'walk the wall' approach and discuss: 'what do we need to do to get to done', 'who needs help', 'what pairs are we changing today', etc. Conduct asynchronously if time zones require.	VC and IM
Stand-down (afternoon check-in)	A second check-in, with mid-afternoon status, to highlight dependencies / blockers before people sign off for the day. Alternatively, ask each person to leave a brief chat message as they leave the virtual team room at day's end saying where they got to today and if they're stuck, etc.	VC and IM

Way of working

Continued

What's needed

Item	Description	Suggested tools and practices
Showcase	<p>One is held every iteration with an agenda to anchor the showcase. Is always attended by stakeholders. Has been tested with remote sharing technologies.</p> <p>If not already in place, begin following up the showcase with an email documenting decisions and agreed actions.</p>	Zoom
Inception	<p>When is the next inception, release planning or project ideation activity planned for? Consider how the activity might be conducted remotely with some adaptations, or broken down into shorter, more focused activities over a period, using electronic tools and video conferencing.</p>	Zoom in combination Jamboard, GSuite or Mural
Retrospective	<p>There is a retrospective every iteration. Uses cycle time or other metrics to drive process improvement. Retro results in identifying action items, assigned to owners. Action item progress is reviewed at start of next retro.</p>	Trello, Monday.com
Product design and vision	<p>Product management and design processes are in place with responsibilities well understood. Product prioritization and trade-offs are happening and the team is aligned on what business outcomes they're working towards.</p> <p>There is a trialled plan for ways to replace face-to-face product / design sessions with remote alternatives for research, collaboration, ideation, workshops, etc.</p>	<p>Sketch / Figma / Adobe XD in combination with Zeplin or Invision for mockups and clickable prototypes and for designer-developer collaboration</p> <p>Balsamiq for wireframing</p>
Working agreement (Team Charter)	<p>Teams have documented, shared and aligned with their stakeholders, the expectations for remote working. This is remote-first (not just remote-friendly.)</p> <p>Core working hours have been agreed across the work-from-home geographies of the team. Consider maximizing core working hours by asking employees to be flexible within reason (eg start the day earlier or finish later to accommodate the different time zones.)</p> <p>Publish the schedule of days and times for your team's regular meetings and activities.</p>	Shared calendars with recurring events

Supporting your people

While the right tools and processes are important for remote work, organizations - and the products and services that they deliver - are fundamentally about people. For remote working to be sustainable, it is critical that we consider the employee experience; becoming deliberate about how we engage, motivate and support our employees.

What's needed

Item	Description	Suggested tools and practices
Onboarding	<p>There are processes in place and content in use for onboarding new team members. Consider following up the onboarding with a buddy system to help new remote team members settle in. Have training / learning materials and links ready for closing skills gaps or tech stack knowledge.</p>	<p>Use a team Wiki (Confluence / Google Sites) to catalog the most important onboarding information; create an onboarding checklist; institute a "buddy" to onboard new people to the team.</p>
Feedback	<p>There is an established framework for 1:1 with team members. Consider moving to weekly for the period of all-remote work. Act on and follow up after 1:1 where there is a need.</p> <p>Undertake a health check as part of the weekly 1:1. Confirm if team members are coping well. It's a different way of working and not everyone makes the transition easily.</p> <p>Get help from HR or Leadership if you are unsure how to support team members.</p>	<p>In-context feedback during / after routine collaboration (e.g. remote pairing)</p> <p>Regular 1:1 check-ins over VC.</p>
Wellness	<p>Teams have a process to update the organization of any illnesses or change in status for their team members.</p> <p>Share information relating to the virus outbreak with the wider team, including status, actions and policy updates. Draw their attention to any company-wide communications.</p>	<p>Email; regular video Townhalls; helpline for those who need it.</p>
Social	<p>The team has set aside some regular time for virtual games, remote sports or to do something social together over video conference. This might be a short period (10-15 min) daily or a longer (1 hour) period weekly.</p>	<p>Separate, perpetual Zoom meeting for watercooler type chats / interactions.</p>
Ergonomics	<p>Employees have a suitable home workspace that supports productivity. The space should be quiet, free from distraction, with deskware that is comfortable for the required working hours.</p>	<p>Create an ergonomics policy (one-time or perpetual) to support this.</p>

Social practices for remote working

Teams can be highly productive working remotely, but in order to achieve that they must **build trust and establish 'social norms'** that enable them to perform.

During a rapid switch to remote-first working, these norms will not yet be established; teams and leaders need to pay particular attention to these issues.

Be empathetic.

For many this is a significant change to life and work: recognize and acknowledge that change and be patient as everyone adjusts to the new 'normal'. Understand that many will be in challenging situations (kids in background, limited quiet or privacy, social isolation). Make a point to connect personally; inquire about others' well-being.

Connectedness is critical.

Emphasize the importance of video and being *present* (i.e. no multitasking) - if the meeting is of such little value that everyone would rather be doing something else, cancel the meeting or change the attendance so everyone gets something out of it.

Building trust takes commitment.

Trust is easier to build if teams have been working together for some time, and especially if they have met in person. For colleagues collaborating

over long distances or multiple time zones who have not met, trust may be low. Ensure team members have some time to interact socially (via video) as this will build a human connection and increase trust and productivity.

Embrace flexibility.

Teams spread across global time zones must work harder to remain connected, and will often need to work early or late in the day to connect with colleagues. Take this into account and try to build working groups who are time zone aligned where possible.

Good audio and etiquette are vital.

Most laptop speakers and microphones are much worse than even a cheap earbud-style headset with integrated microphone. Practice good meeting etiquette: remain on mute if you have background noise, don't hog the microphone, take turns to speak, be polite, keep an eye on chat for team members raising points to discuss.

Further reading

If you would like to read further on the topic of remote work we recommend the following resources:

Thoughtworks materials

[Coping with Covid-19](#)

[Coping with Covid-19 part 2](#)

[Remote vs. co-located work](#)

[9 amazing strategies for working remotely](#)

[11 tips to improve remote meetings](#)

Additional sources

[Gitlab's Guide to all-remote](#)

[Remote work emergency plan: What to do \(and where to start\)](#)

[Guide to Remote Work](#)

[How to embrace remote work](#)

[10 lessons from four years working remotely](#)

[Remote facilitation](#)



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