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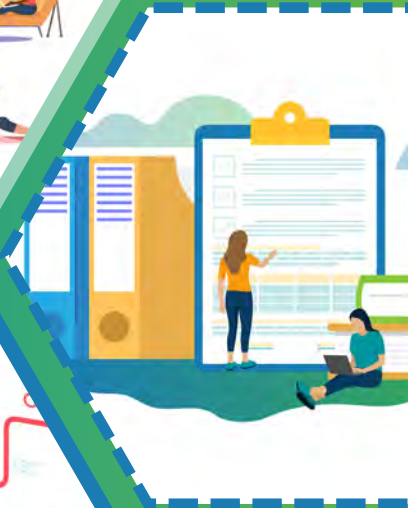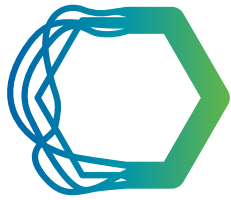
MANAGE HIGH-PERFORMANCE REMOTE COMPANIES THAT SERVE PEOPLE AND PROFITS.

OVERHAULING BUSINESS FOR THE REMOTE ERA

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Thanks to COVID-19, everything has changed. The way our kids get their education. The way we eat at restaurants. The way we travel. The way we work... A lot of companies were forced to throw people into remote work without the right systems in place to make it successful. And as a result, some organizations have been experiencing major pitfalls and bad experiences with remote work.

For the past 5+ years—well before the pandemic hit—Apiary Digital has been honing in on and fine-tuning the *opportunities* remote work presents. During this time, we've uncovered major gaps in how companies utilize talent and technology.

Remote work is not about how to do what you did before, but outside of an office. Nor is it a stack of tools and tips to help you work remotely. It's a **completely new opportunity to rethink how you do business**—and how you can better-align talent with business and human needs.

Throughout this ebook, we'll be sharing the ingredients for our secret sauce. That is, for aligning fully remote teams chock-full of top talent to drive extraordinary business performance. But before we dive into the considerations and how-tos, let's explore just how broken the traditional work model is, and where remote, structurally flexible teams can make your organization whole and healthy again.

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Overhauling business for the remote era

As much as we sometimes wish otherwise, business growth does not happen in a linear fashion. It's erratic and full of ups and downs. We classify this volatility into neat monikers of "business cycles" and "seasonality."

Let's look at the normal seasonality of a B2C ecommerce company in which a big chunk of revenue happens in Q4:

Typical Revenue Opportunity

Nothing revolutionary to see here, but how do companies typically capture this revenue opportunity? Answer: With a fairly fixed staff of full-time, in-office employees.

## Traditional Staffing vs Revenue Opportunity

Immediately, you can see a problem with the traditional work model. Businesses almost always have the wrong volume of labor relative to revenue opportunities—they're inherently misaligned. Employees are expected to work around the clock during peak season without additional compensation.

This is a CFO's nightmare. During slow times, fixed costs are way too high. During peak season, you're understaffed, thus missing out on revenue opportunities and failing to protect your significant Q4 investment with enough eyes and keyboards to manage it properly. Not to mention, the long-term costs of over-taxing your team, leading to burnout, turnover, and increased expenses with recruiting, managing, incentivization, and lost institutional knowledge associated with higher turnover.

It's not just that the overall labor supply doesn't make sense. The traditional work model doesn't align skills to business needs, either. To maximize revenue, you need different skills at different periods.

Skills needed vs Traditional Staffing

■ Strategy　　■ Creative　　■ Development　　■ Media Buying　　■ Traditional Staffing
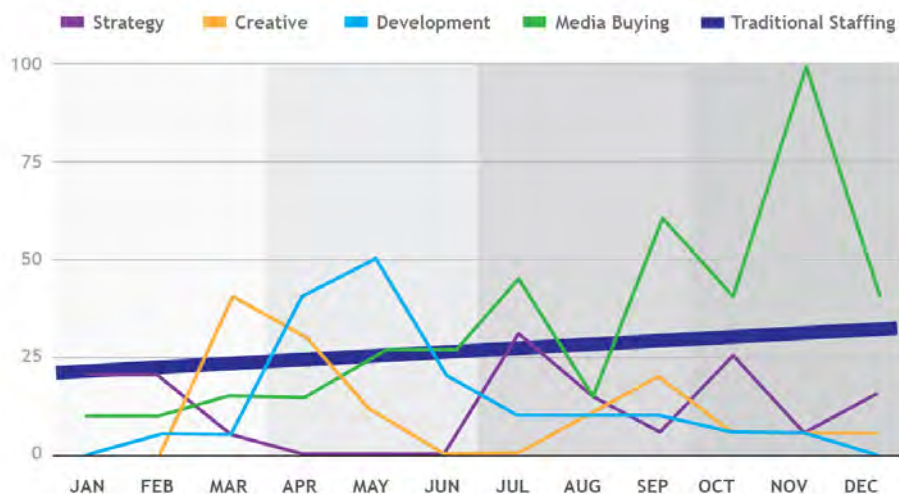
Early in the business cycle, you need strategy, planning, and analysis. Then, during the slow times, you might want to invest in infrastructure, so you'll need IT, product, and development.

Then, leading up to a big push, your creative team will be on-deck to prepare anything that can be done ahead of time. And finally, during peak season(s), you need a huge spike in people who can execute, optimize, and report on success.

With traditional staffing, there's a degree of flexibility to train people to acquire new skills, which is an excellent way to serve your business and keep your team

engaged. We applaud cross-training. But by and large, you have a fairly constant skillset with a traditional work model, which only gradually increases over time as your team gains experience and training. This doesn't give you the flexibility needed to rapidly take advantage of market opportunities or keep up with changing technology. Ideally, businesses need the right skills at the right time—and fast. Then, not pay for those skillsets when they're not needed.

This logic applies not only to highly seasonal businesses, but to all businesses. Think about the different types of skills needed throughout a product release or major launch. Or, the chicken-egg growth problem of needing additional people to scale, but not having the revenue to justify hiring full-time staff. Sure, you can blow through venture capital money, but it's a risky bet to increase your burn rate unnecessarily.

WORK DOESN'T WORK GREAT FOR TOP TALENT

Here's what high performers typically want to get out of work: Professional growth, enough income and time to do things that are important to them outside of work, and working with a great team. Let's break that down.

▶ **Professional growth.** The typical setup for professional career-growing positions requires living in an expensive city and/or having a long commute to work.

▶ **Enough income and time to do things that are important outside of work.** Because of the previous point, companies have to pay very high salaries to attract and retain people. To justify the high compensation, companies have to demand a lot. This leads to little flexibility or time to do what's important outside of work.

▶ **Working with a great team. Especially when it comes to long hours to fill the gaps in seasonality when teams are understaffed, demands on employees are high.** This burns people out, leading to high turnover. Teams never get to really gel into what they could be, even if you have great people to begin with.

THE TRADITIONAL WORK MODEL IS GREAT—IN MODERATION

In case there was any doubt, to make any business or team work, you absolutely need some full-time in-house staff. You must have that continuity of people with deep ties and relationships across the organization who know the brand and the business—those who can lead the strategy and manage the people who are not entrenched year-round. The more effective the fixed staff is at leading and coordinating, the more value you can get from utilizing a structurally flexible team *(more on structurally flexible teams coming up!)*.

At the same time, it's not fair to expect your in-house staff to do all that and be your buffer to handle the volatility of a typical workload. Your full-time fixed staff is valuable, and you should protect them from burnout and overwork.

STANDARD ALTERNATIVES DON'T CUT IT

Some alternatives already exist. The obvious one is to hire an agency. The ad industry is typically compensated on a percentage of spend model, which lowers costs during slow times. But the fees will seriously eat into profits during peak season, and with a traditional high turnover agency model, which often relies on a lot of junior talent, brands pay an untenable premium on work done by inexperienced people with inconsistent service. Plus, within the agency world, the misalignment between people and work is even more pronounced. Agencies expect people to work for a fixed salary and meet the demands of peak season clients by working long, unpaid hours of overtime (while charging clients a hefty premium). So, even if agencies could solve the business problem, they certainly don't solve the people problem.

Another common option is to hire contractors during peak season. But finding, vetting, hiring, and onboarding good people is really difficult, as is integrating external folks into your team. Especially if you need multiple people who are working disparately. It's hard to rely on finding trustworthy people quickly for such a critical time for the business. Additionally, you take a lot of time away from your core business to manage the whole process.

STRUCTURALLY FLEXIBLE TEAMS

If traditional work doesn't serve businesses or top talent all that well, what can be done differently? Answering that question is exactly the point of this ebook. It's what we do at Apiary, and we're here to share what we've learned.

On the surface, what we provide at Apiary Digital is digital marketing consulting services. And we do that very well. But the real business problem we solve—and the reason we exist—is to fix this underlying problem of misalignment between business needs and people needs. We exist to create wildly successful business outcomes by providing a framework that allows and encourages people to do what is meaningful and important outside of work. Our vision statement:

> Drive extraordinary business results by enabling exceptional performers to live their stories.

Go live your story!

We have more than proved the concept at Apiary. As a small boutique shop, we drive performance marketing success for Fortune 1000 companies and high-growth startups alike. We have white-labeled under some of the largest digital agencies in the world, and been part of the success of brand launches like Rihanna's Fenty Beauty line.

Because of the results we drive for clients, by our third year in business, we bootstrapped our revenue to 18X what it had been in the first year. We are most proud of how we've achieved these results and with whom. We do what we do by having exceptional talent with backgrounds leading performance media at global Fortune 500 brands, from nearly every top digital agency you can think of, and from places like Google and Facebook.

Why do we have such amazing talent? How did we attract them without a venture-backed budget? Why do they stick around? How exactly did we build a business that helps clients to better-align talent and revenue opportunity to make things look more like this? Answer: Because **at Apiary, we have figured out how to design structurally flexible teams that align individual talent needs to business needs.**

Structurally Flexible Teams vs Revenue Opportunity

As companies test out permanent remote working options, it's more possible than ever before for many companies to do what we've done.
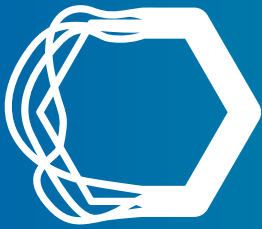
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Talent is the customer: Employment in the remote era

Work is broken for talent—especially top talent. It's time to reprogram our thinking, approach, and underlying assumptions from which we build talent-employer relationships and opportunities in the remote work era. It's time to start thinking about talent as the customer.

EMPLOYMENT-AS-A-SERVICE

"Employment-as-a-service" may sound like a SaaSy, cringe-worthy buzzword, but it's a way to help emphasize the importance of rearchitecting relationships between talent and companies. It's a foundation for aligning costs and skills to true business needs.

The prevailing assumption in corporate jobs: If they're paying you the big bucks, they own you, and you're there to serve the company as it suits them.

A new assumption for the remote work era: Companies offer employment as a service, and top talent is the customer.

The value proposition of employment

Employment should be viewed as a service companies "sell" to top talent—and the "buyers" generally care about these 5 value propositions, in no particular order:

1. Money and financial well-being

2. Having the ability to do what's important in life outside of work

3. Belonging to a highly effective team

4. Opportunities for professional growth by working on big, challenging problems

5. Aligning work to personal values

The composition of how important these things are is different for everyone. Throughout our careers, and even throughout any given year, we weigh these elements with different degrees of importance.

Depending on what company and team you're on, the prevailing model of work can deliver quite well on the financial compensation part. Sometimes, it can deliver on the professional development and team-belonging bits, too. But seldom can it deliver on paving the way for doing what's important outside of work.

Under the prevailing model of work, employment is a largely undifferentiated service. Not only is work set up as if the company owns the employee, but it starts with the assumption that above all else, people value income alone, no matter the trade-offs.

At various points in our lives and careers, this setup may be exactly what we want and need. And, companies absolutely need some employees with the traditional FTE level of engagement to provide strategic continuity to the business. There are certainly people who value the prevailing mix of benefits. But—**let's suspend disbelief to examine a new hypothesis:**

> ▶ People want access to employment—not to be "owned" by their employer

> ▶ People want a dynamic blend of value—not just monetary—to come from employment

> ▶ Approaching employment as a service is good for business

CUSTOMER PERSONAS: TOP TALENT AND WHAT THEY WANT

The working parent

The working parent needs a balance of income stability and flexibility to work around kid schedules, but usually within a predictable, consistent pattern. The working parent doesn't work during school pick-ups/drop-offs and may catch up on work during the weekend. This person would rather work less in the summer when kids are out of school, and more during the school year. The working parent has built a strong, long-standing professional foundation and wants to keep nurturing skills and gaining experience.

The digital nomad

The digital nomad wants big freedom and adventure, but is not willing to sacrifice their career to do so. They prefer to work in bursts—they're okay working long hours if it buys them time to cover large chunks of offline time. The digital nomad may work in different, changing time zones. They come with a lot of professional experience and drive, and their lifestyle often inspires them to be adaptable and innovative.

The trailing spouse

At the height of their career, driven, and on a hot professional track, the trailing spouse has to make an extremely difficult decision to follow a partner to another city with limited professional options. They will immediately seek out remote work opportunities to be immersed in learning and growing professionally. A trailing spouse wants new opportunities, income growth, and regular business hours to keep weekends free when their partner is off work.

Other personas

There are many other personas to describe the needs of top talent. At Apiary, we see digital marketers who are athletes needing time and flexibility to train for the Olympics; artists who want to do standup comedy but still need a steady income; entrepreneurs maintaining income and skills while building their customer base; and everything in between.

A persona we expect will emerge as the next big customer wanting access to employment-as-a-service: Semi-retired baby boomers. We expect this persona will want to utilize their considerable experience, maintain a sense of belonging and professional purpose, but exercise a lot of choice over the types of projects they work on. And, similar to digital nomads, will want to work in bursts to maintain big blocks of time off.

STRUCTURALLY FLEXIBLE TEAMS FULL OF MULTIPLE PERSONAS

On the surface, putting these types of people on the same team sounds like a management disaster. Without critical elements like working with the right

Structurally Flexible Team
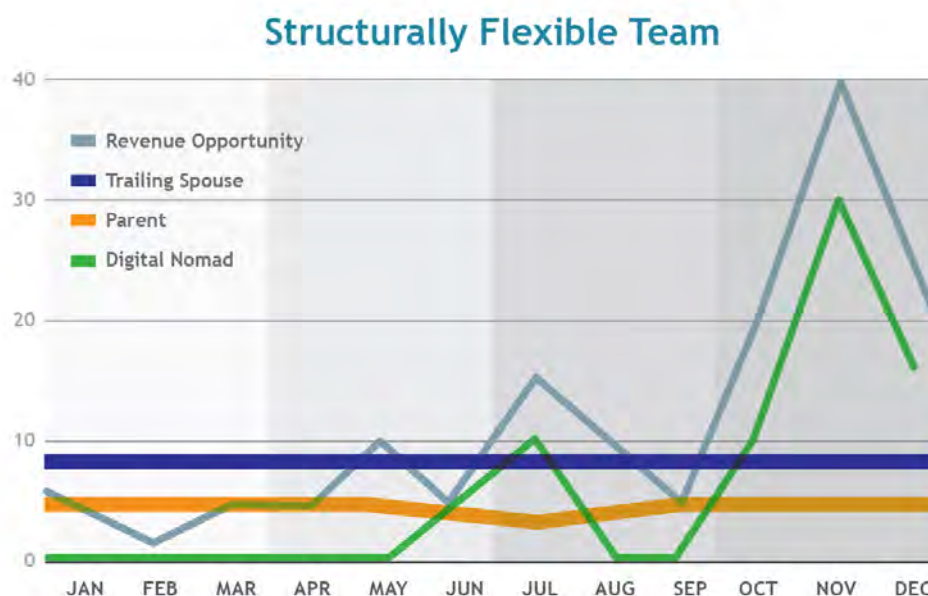
talent in the first place, and remote-first communication, culture, and operations, it probably would be a complete fail. But recall, in Chapter 1, we highlighted that the prevailing setup for work is horribly misaligned between labor and revenue opportunity. Now, consider the possibility of all these different personal preferences overlaid on the business needs. The magic of Structurally Flexible Teams emerges.

Once you understand the business needs and the people's needs, you can hire the right people into roles to provide consistency, continuity, and coordination across the year. Then, you layer in those with different preferences to supply top talent at the right time to deliver on the business needs, while aligning cost and revenue opportunity + personal preferences.

In this scenario, you keep your full-time staff happy because they don't get overworked or burnt out, and there's still flexibility to design work around life. They also get relieved of big projects that hamper them from doing strategic thinking.

With this model well-executed, and assuming you're paying people hourly, project-based, or some other pay-on-performance model, everyone gets paid for all their contributions, and your CFO is thrilled to tears to see you've aligned costs to cash flow. Think about how much less dependent your company will be on outside funding if costs align to cash flow! You can enjoy stronger margins, less dependence on outside sources, and better control over the destiny of the company.

Now, throw something like COVID-19 into the mix and you can see how Structurally Flexible Teams are resilient. The working parents who usually work consistent schedules will be thrown into varying schedules juggling childcare demands. Digital nomads will be grounded, unable to keep traveling and will be ready to pick up more work. People with a balance of different needs personally makes it easier for people to cover for each other in different, dynamic situations. To fully benefit from Structurally Flexible Teams, you need more than just the right mix of lifestyles. You need humble, exceptional performers who are adept at remote teamwork. How to recruit and vet such talent will be the topic of the next chapter.
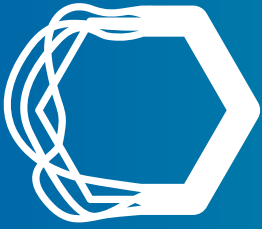
3 **Recruiting remote teams**

To build a successful remote organization, and particularly if you want to promote freedom and flexibility by hiring people who can operate successfully within a Structurally Flexible Team—that is, where people with different working styles and needs come together to produce results aligned to business needs—you need to start with hiring the right people. Here, we share our wealth of experience and knowledge about how to hire successful remote team members.

A quick note to help establish our credibility on lining up talent for remote work: At Apiary, we have had from Day 1, a collective of consultants with the kind of backgrounds big companies with much larger budgets fight over and struggle to recruit. People come to Apiary with 8-15+ years of specialized expertise gained from places like Google, Facebook, Twitter, Microsoft, Macy's, Williams-Sonoma, iProspect, 360i, and a plethora of the largest digital agencies and other Fortune 500 brands. We don't have a single junior resource or cheap, outsourced labor hiding in the wings.

WHAT'S DIFFERENT ABOUT HIRING REMOTELY?

As a remote organization, you automatically have a vastly broader talent pool available. You can, and should strive to seek out even more exceptional and diverse talent than you would if you were recruiting for a traditional office environment. But, you also have more competition from other companies around the world. So, it's more important than ever to approach finding top talent as attracting customers, not workers. Set the stage for success by aiming to provide talent with employment as a service. This paves the way for building Structurally Flexible Teams that enable career-driven people to do the things that are important to them outside of work while also delivering exceptional business results.

WHERE CAN I FIND TOP REMOTE TALENT?

It is, of course, easiest to hire and build trust remotely with people you already know, and from the connections and referrals of your company's network. But, hiring only within your close circles has some drawbacks. A big thing on our minds is the value of diversity to business and teams. Especially as marketers, our job is to help clients build, connect with, and convert their audiences. The more diverse our pool of consultants, the better we can accomplish this. Because we prefer to hire people we know and trust, we're working on building relationships with a more diverse network of people in the first place. We encourage others to examine their hiring and networking practices to be intentional and proactive.

The other thing about hiring from your own network is that you can't wait until you have an immediate need to start building relationships with people who might be a good fit. At Apiary, we invest in relationships with people long-term, even though the work itself is generally project-based. The nature of nearly all work relationships is temporary because you're not going to have the same co-workers or suppliers forever. Throughout your career, you might cross paths with the same person in different roles and contexts. And one day, you might be their boss; in another situation, they might be your client.

Tools and technology are certainly important for managing on-demand talent and resourcing the right skills at the right time to align to business needs. However, it wouldn't actually work all that well without the network of trust and relationship continuity, which is a big part of the value Apiary provides across projects, people, and time.

WHAT SHOULD I LOOK FOR WHEN HIRING REMOTELY?

We firmly believe accountability is the single-most critical quality to look for in a remote hire. That is, people who genuinely care about their reputation and work quality. People with a high degree of accountability to do whatever it takes to deliver no matter what company they work with, or role they're in. Build your company culture and operations around making these people successful and you'll keep your top-performers happy.

Colleagues who aren't so accountable won't last long in a Structurally Flexible Team. Personal accountability means you don't need to spend time or resources monitoring the people who work for you, or worry about them abusing flexible policies. You can focus on treating them like the customer they are. We've found running through the following questions is a good way to determine if someone is accountable:

▶ Do they plan their personal offline time so that it doesn't fall around known deadlines?

▶ Do they have backup plans for how to get WiFi for an important deadline if they're traveling?

▶ Do they line up coverage so they can enjoy their offline time with peace of mind that the team can keep making progress?

▶ Do they turn their lack of planning into someone else's emergency?

⚠ **Pro tip:** If someone can't get it together to have reliable video-friendly WiFi during their initial interview, they probably won't figure it out later, either!

Look for past experience working remotely. Being effective at remote work is an acquired skill. From what we've witnessed, it takes 6-18 months for someone who has never worked remotely to truly get the hang of it. You have to figure out how to use remote working tools, and build productive, high-trust relationships without being in the same room. Even little things like setting up a physical office space or figuring out how to get reliable WiFi while traveling take time to figure out. It also takes people time to build life around work, replacing corporate socialization with other communities. Experience collaborating with people in different offices is helpful, but it's not the same.

Hire communicators. To make any of this work, you need highly effective communicators—both in written and verbal form. You can't afford to hire the solo genius who may be technically brilliant, but creates a huge communication tax on the rest of the team. Err on the side of seeking over communicators, but not to excess!

Hire self-managers. You need people who are highly considerate of others, and who can think ahead. If you work Sunday nights, but your team does not, you better have all the pieces you need to get your work done without having to bug your team. People who appear to be always-on are not necessarily dedicated to their work, so much as they're not great at planning ahead. Reward those who are organized enough to not have to be online all the time.

Screen for empathy. The touchy-feely, I-care-about-your-feelings kind of empathy is nice to have, but more important is finding people who can put themselves in someone else's shoes and adjust accordingly. You need people who can quickly contextualize another person's understanding. Example: "Oh, I see, I believe you're bringing up data related to the Germany project, but we're actually discussing the UK campaign." Empathy is a communication shortcut. With remote work, you can't afford to let any misunderstandings slide, or you risk wasting days of productivity when someone runs off and works on the wrong thing.

Emotional intelligence (EQ). In a remote work environment, you have very few cues to identify when someone on your team is struggling, or when someone is quietly not agreeing with a decision, and failing to speak up with an important point. You need people who will notice and invite the person to talk who unmuted 5 times in a video call, but never got a word in. Those who have a demonstrated ability to maintain long-term, long-distance relationships will have a leg-up with this. Team members willing to do emotional labor for the good of the team should be rewarded and valued in a remote team.

PITFALL: THE 24-7 TEAM

If you're hiring top-performing, self-driven, communicative people, and then giving them the flexibility to work when they want, a big pitfall to avoid is people working 24-7. By nature, self-driven people want to support their peers who are working different hours, and it's easy to become an always-on train to burnout town. This undermines the entire operation and notion of talent as the customer. It's a potential pitfall you have to proactively and systematically protect against.

People rolling out of bed, working, and blurring the lines between home and work is a bug not a feature. It has to be written into the DNA of your company. In this endeavor, technology and tools are not your friend. They're built to be "sticky." Brainy engineers and product geniuses get paid the big bucks to make people want to use tools more, not less. Without the confines of physical offices and business hours, you're on your own, designing a company to protect against the 24-7 team. Hiring people who are great communicators and self-managers is a good start as they generally do not have to work around-the-clock to stay on top of things. But more must be done.

Set clear parameters. What time zones will you hire from? What overlap is needed for productivity. What level of flexibility will you offer? Do you expect butts in seats from 9-5? If so, why? Do you expect people to work a certain number of hours in a given week? Can people take off during the day to pick up their kids from school? Your expectations are important to the culture you create, and people need clarity on what they are signing up for, before you hire them.

Leadership boundaries. Leadership needs to set the example. Take the time to explore your own workstyle. Discover how you work best; what makes for the most productive day. Does it involve starting at 5 a.m., taking a nap in the afternoon, then shutting down at 3 p.m.? Great, do that—and then have the courage to set the example. Don't keep checking email and Slack when you're outside your own work hours.

Create an environment where it's okay to pick up the phone and call or text people if there's a true emergency outside of working hours so people don't feel they have to constantly monitor communications to know when they need to jump in on something. *When taking a vacation, take an actual vacation—don't just work from a different location*. If you do that, everyone in the company will come to believe they're free to, and expected to do the same.

When people are respectful and considerate of each other's time and needs, and are organized enough to plan ahead to avoid creating unnecessary emergencies for each other—when there is a true emergency, people will drop everything to

roll up their sleeves and help the team. After all, working on a Structurally Flexible Team with a strong talent-first culture is a good gig. People want to keep doing it, and they'll work hard to make the thing succeed.

All of these characteristics may seem like a tall order. But, if you're really providing what the customer wants (employment that delivers professional and financial well-being in a package that enables people to do what's important outside of work), you attract top talent. And, since you're delivering a ton of value to them (the customer), you can expect a lot from them, too.
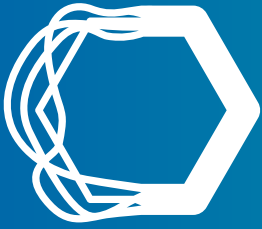
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Business operations for supporting remote teams

Let's recap this ebook so far. We've introduced a new way of thinking about establishing remote organizations, building around the unique benefits of remote work instead of trying to 1-to-1 replace office life virtually. We've replaced outdated assumptions about hiring with the premise of treating talent as the customer. That is, viewing employment as a service which is foundational to attracting top talent and aligning individual needs to business needs. And to do this, you need the right talent. There are different characteristics to filter for when hiring remote talent.

This chapter will cover the operational infrastructure and approach needed to reap the benefits of Structurally Flexible Teams, and maximizing the value you get from top talent.

PUT PEOPLE FIRST

People are at the heart of every organisation—even more so with a remote business. Advice like, "make sure to say hi to people" may sound silly, but it's easy to forget when you're not in the same office. Say hello and introduce yourself whenever you encounter or interact with someone new. If you welcome a new person onto your team, make sure to introduce them to others. If you are on a video call and notice someone new that you've never met, introduce yourself.

It's easy to overlook simple connections like saying "hi" in a remote work environment because people won't have many happenstance ways of meeting others. Make a proactive and conscious effort to ensure people are introduced to one another. At Apiary, we introduce new consultants in our #watercooler Slack channel and ask them to share a little about themselves. This often sparks interesting side conversations and helps people build personal connections.

ENSURE ONBOARDING IS SMOOTH SAILING

The first step to ensuring a new-hire is successful involves a bit of matchmaking between projects and individual skillsets. Once someone is hired and matched to a project, a key indicator of their success within the remote organization is how well their onboarding process goes.

At Apiary, we've got a well-documented onboarding process which includes:

- ☑ A comprehensive welcome email with step-by-step onboarding instructions

- ☑ Invitations to email, Slack, and our time entry/project management system

- ☑ Immediate access to our internal resource library

☑ An 11-step onboarding process they are instructed to work through and systematically check off within the first 2-3 business days of being hired

Once a new-hire has completed the onboarding checklist, they're invited to attend a new consultant onboarding session—ideally with other recent new-hires to give them a chance to bond with the other newbies. This session gives them further insight into our vision and values, how we work with clients, how to get the most value from being part of Apiary, and more. Throughout the onboarding process, we ask for feedback on how things can be improved because what makes sense to one person may be confusing to another.

DOCUMENT SOPS EARLY AND OFTEN

Document all standard operating procedures (SOPs)—early and often! In a traditional office environment, you might be able to get away with allowing nuances of your systems living with the one brilliant subject matter expert that can answer all the questions. But with a remote business, you have to build solid processes, habits, and continually updated documentation. Everyone needs to know where to find a given piece of documentation and how to update it.

To build good documentation:

1. Identify replicable processes (especially those that require collaboration).

2. Build an outline of typical steps, including project management tools, task list templates, and links to other supporting documents needed to execute on each step. Ensure you're keeping in mind who the "customer" is in each step, and think from the customer's perspective when creating the documentation.

3. Have someone else test out the documentation and provide feedback. Address the feedback, then make it accessible to everyone!

ENSURE EVERYONE HAS THE ACCESS THEY NEED

Speaking of access... *everyone* on a remote team must have the access they need to documentation, tools, accounts, data, and project status, or it can be a huge productivity killer. If you have people working at different times of day, the last thing you want is to lose a day of work because someone was missing something important.

Establish standard conventions and systems for storing and accessing information, and then maintain strong habits of keeping information accessible and transparent. You want people talking and collaborating on important topics,

not disrupting each other's productivity to ask for information that should be easy to access independently. Teams who fail to maintain access to information will get trapped in the 24/7 remote work life, and if someone gets sick or goes on vacation, it will be difficult to to keep moving things forward.

DESIGN FOR TRANSFERABILITY AND REDUNDANCY

When we say "transferability" what we mean is you want to ensure multiple people on the team can pick up a given process or task. When you have big projects and peak-season workloads, you can quickly plug in extra hands. Individuals then have the flexibility to go on vacation, take offline time, or take care of sick kids while the rest of the team moves the business forward. Let's stop pretending anyone can be "on" all the time! A lot of companies are designed around the premise that people will always be at 100%, which they just aren't. So instead, plan around the reality that you need contingency plans to keep moving the business forward even if not everyone is 100% all the time. This was important before COVID-19, but it's even more critical now.

Although it adds some up-front costs, at Apiary, we see a big value-add to building a bit of redundancy into our business, where multiple people are cross-trained, looped in, and able to cover for each other. Especially during the pandemic, we've beefed up coverage plans. Every client project has an emergency coverage back-up plan. If someone had to suddenly take time off to care for a sick family member, for example, we have thought through ahead of time who could jump in to take over their work, and have gathered critical links and information that person would need to step in. We've also seeded project relationships that would facilitate an unplanned transition. If we need to, we can keep driving business forward even if one project team member needs to tap out for a bit—this makes it easier for people to take planned vacations, too!

> Managing remote team operations isn't just procedural in nature, it's also cultural. You can't have people believing that their entire value to the organization is that they're the only person who can do X. Otherwise, they'll hold back information to ensure the importance of their position. Instead, show people their value to the organization is in their ability to make good decisions in-line with company values, in their ability to be flexible and considerate, and to produce results.
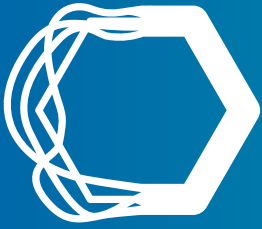
5 Remote work tech

The tools and technology we use to manage remote business are only a means to an end. Many people mistakenly believe that implementing the right software somehow equates to good remote business management. This couldn't be further from the truth! Your remote tech stack is only there to help facilitate the underlying purpose and vision of your company, support the remote team culture you're building, and streamline operations and communications. You shouldn't be designing remote work around tools. You should be designing a good business, then buy tools to facilitate your goals.

In the wake of the pandemic, we've seen an unfortunate increase in tools designed to monitor and surveil employees (in their own homes, no less!), or tools trying to replicate the office at home. If your company is looking to buy licenses for a tool like this, software can't fix whatever is broken. Recognize this as a symptom of a management problem and a culture problem. Stop and rebuild company culture on the assumptions that talent is the customer, employment is a service you sell to serve talent, and they're highly accountable people who take pride in delivering exceptional work. Retrain or hire new management with the EQ to manage high-trust remote teams.

USE-CASES FOR REMOTE WORK TOOLS

We are fortunate to be working in an era where cloud-based software is ubiquitous to the point it's almost something we take for granted. We'll mention a few of our favorite tools, but mostly focus on the remote work problems technology is really good at solving.

General communication

Before we even dive into addressing the nuts and bolts of making a remote organization run with remote tech management, there's the communication challenge—especially for startups. In a startup, there's a lot of ambiguity (no documentation, no project plan, no how-tos) and to figure things out, it's all about communication. The key at this stage is to leverage your communication tech stack as efficiently as possible. With tools like Slack, employees can communicate in different channels and threads, but those different channels and threads can quickly result in confusion about action items and priorities. That's where tools like Jira/Salesforce and Asana/Teamwork are needed. High-level decisions and action items can be pulled out of those conversation threads and become documented, assigned actions.

Operationalizing and managing repeatable processes

One of the many things that's great about being remote is you tend to develop

standard operating procedures (SOPs) earlier than you would in a traditional office environment. When you're not in the same room, it can be difficult to know who does what and when.

Whenever possible, identify recurring processes and create SOPs. At Apiary, one thing we do frequently is onboard consultants and kick-off new client projects. To support this, we've built templatized task lists so we can easily assign tasks to all involved parties. Initially, these began as lists in Google Sheets, but eventually grew into task list templates within our project management tool. We use Teamwork, but you could likely accomplish this within most project management tools. For improved transferability, each step includes how-tos and links to important documents; and steps can easily be reassigned if someone gets sick or goes on vacation. Your business may have different recurring needs that can be operationalized in a similar manner using a project management tool.

How-tos and "drive-by" interactions

We ♥ [Loom](#). As you'll see throughout this chapter, we're trying to refer to use cases for tools more than evangelizing specific tools, but this is the exception. With Loom, you can record video messages that include both screen-sharing and video. It's a bit like the use case of walking over to someone's desk and quickly explaining something, but better because someone can take in the information in their own time. You could conceivably build your entire company how-to guide on Loom, infusing a personal touch along the way. And, Loom is free as of this writing!

Explaining things that aren't important enough to justify scheduling a meeting

Nobody wants to read a monster-long email. Recording a voice note from your phone and emailing or Slacking it to the team is a simple, useful way to communicate ideas that are difficult to express on paper, but that don't quite justify a whole meeting, or bugging someone with a phone call. Just don't over-do it. It takes longer to listen to a voice note than to skim an email.

Managing remote relationships with multiple parties involved

We use Salesforce Essentials (the lower-cost SMB version) as our CRM. It's a powerful tool we use for managing both our sales pipeline and recruitment pipeline. When managing remote relationships, it's important to keep accurate records and logs so you don't have multiple people pestering someone about the same thing. And, when you go to talk to someone, you can read notes from previous calls to understand the context of the relationship, and how that person might feel about your organization. It's hard for us to imagine functioning without a well-structured CRM!

Scheduling

When every real-time interaction has to be put on the calendar, you pay a huge scheduling tax. First, as a practice, don't do a bunch of wishy washy "send me your availability" back-and-forth. Just put time options out there right away. Second, a scheduling app, or even a real person assistant can help tremendously. We use the Salesforce Inbox scheduler tool, which is handy because time options are embedded directly into the body of an email, linked to Google Calendar, and you can self-select which times you want to offer to which people. There are many other tools out there, Calendly being a big player. That said, scheduling is still kind of a pain, especially when many calendars and time zones are being coordinated. Tools help, but still much to be desired in that area.

Signing documents or updating PDFs

At Apiary, we use DocuSign. We've tested other tools and they're all about the same with minor degrees of difference in functionality and ease of use. You can also insert your signature directly into a PDF and edit PDFs that aren't set up to be editable by enabling basic functionality in just about any free PDF program. A quick Google search will show you how to do this in your PDF program, and save you a lot of time trying to print and scan documents.

Side conversations

Believe it or not, there's actually a tool out there that works great for the "meeting before the meeting" and the "meeting after the meeting." It's called the telephone, and you can pick it up and call people with it. You can even three-way call from most devices!

For some reason, it's easy to forget about the "just call me" option. It doesn't require scheduling, and it can be a more casual way to connect with people. If it wasn't pre-scheduled, there's not an expectation that someone will be sitting at their desk, so it's easier to have meandering conversation while multitasking. You get the color of background noises that give fodder for unstructured get-to-know-you trust-building.

If you're in a management position, you have to be careful to avoid being intrusive with phone calls. But it's also a great tool to see how people are doing. After a difficult meeting or situation, some personalities tend to hull up and marinate on bad stuff. In a remote environment where we can't see if someone is struggling, this can go on too long and lead to resentment or discontent. Talking on the phone can be a good way to help people process what's going on so they aren't in it alone. Just be aware that if you catch people off-guard when you call, you need to give them room to say unpolished things.

Document collaboration

We almost forgot to include this because it nearly goes without saying. You can't be a successful remote team if you're dealing with version control issues; you have to type comments separately in an email where someone then has to spend 10 minutes figuring out which document you're talking about; or you lose a day of productivity because not everyone has access to everything required. We use G Suite with Team Drives to avoid all of these issues.

GAPS REMOTE TOOLS DON'T YET BRIDGE

By no means does the plethora of existing tools and technologies cover all business needs for an organization—yet. Here are a few areas we've identified as lacking or not *quite* there.

Services for remote companies – *emerging category*

If you're one of many entrepreneurs getting your start or trying to pivot during the pandemic, this is for you: Everything from companies that send home office devices and desk kit setups, to those providing remote employee engagement through snacks are cropping up. We're certain many types of platforms from mobile fitness companies to online learning platforms, virtual events, and everything in between will figure out soon enough they can sell to corporate HR benefits managers so remote employees can connect through virtual yoga classes and the like. Now that big tech companies can't attract talent with fancy office campus amenities, innovation will happen in this space.

Inventing net-new things that require significant collaboration – *existing gap*

There are several virtual whiteboard and collaborative sticky note platforms out there. But they're just not the same as gathering around a whiteboard. While there are some devices that let you digitize things you "write" on paper, there's no good option yet for people who think and invent in a paper notebook without tirelessly translating it into a digital format for collaboration later. Scheduling extra team meetings to try to construct those in-person-like happenstance moments has the ironic consequence of disrupting unstructured time that leads to invention.

Platforms native to a generation that grew up 'inside' the Internet – *existing gap*

Even before the pandemic, Gen Z and Gen Alpha have been growing up in what is essentially a mobile-first (read: REMOTE-first) world. Many tools built by baby boomers and millennials surely won't make sense to those who are starting school, work, dating, social lives—really, all aspects of life from within a virtual

world. They're coming from a different paradigm. If we speculate for a moment…
will "going to work" be more like a video game than a project management tool
someday?

The move from a traditional office to an all-remote organization can be daunting,
but as we've illustrated throughout this chapter, there are tools and technology
to support almost all business needs. The key is to first clearly define the pur-
pose and vision of your company, and the type of culture you want to proliferate
throughout the organization. The tools are simply there to help facilitate things.
As one of our beloved partners says, *teamwork is what makes the dream work!*
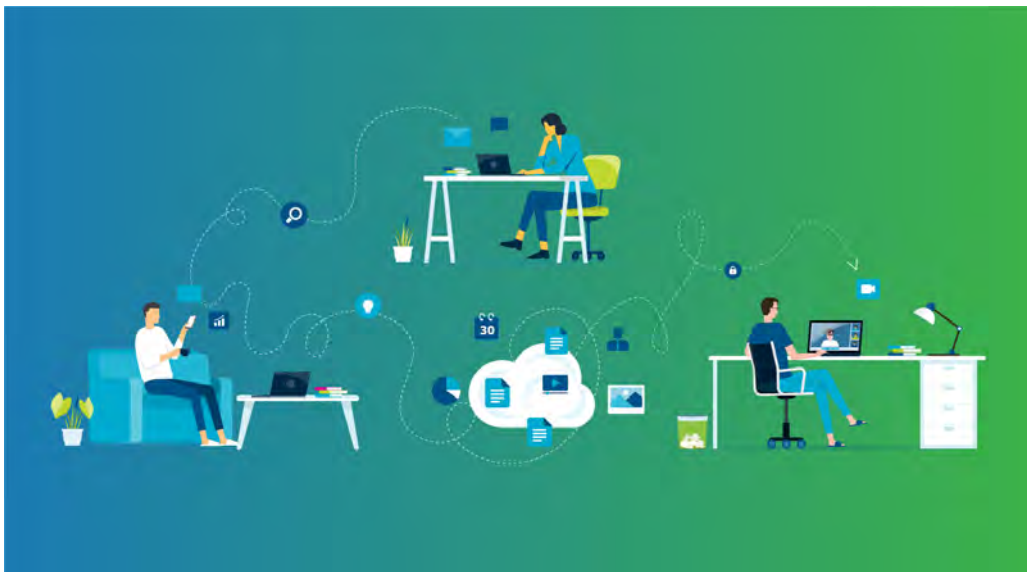
Concluding Remarks

Our hope is this ebook has given you some nuggets of information you're excited to apply as your organization settles into remote work for the long haul. Although remote-first is a new concept for many and has its own set of challenges, this new way of working comes with so many amazing opportunities.

We challenge you to approach remote work within your organization not as "the same thing we've been doing, only remote," but rather as an opportunity to rethink the way you do business. Everything from how you document procedures, to how you communicate with colleagues, to how you view your employees. Taking the time to step back and rethink things means opportunity for establishing continuity across your organization, opportunity for improving productivity, opportunity for ensuring your employees feel valued and a part of the bigger picture, and so much more.

Appendix: A few notes on remote business regulations & policies

We acknowledge there *are* caveats to hiring the best talent wherever they may be located—but we promise it's *still* all worth it!

The legal, regulatory, and tax systems**S** are *not* conducive to building remote companies—at least not yet. That's a big capital "**S**" because you must comply with the cluster of local employment, state employment, and tax rules in *every* jurisdiction in which you have a footprint. If you're an international organization, that adds an additional layer of complexity.

Throughout this ebook, we've been touting the joys and benefits of building a remote company or "going remote." But, alas, nothing is perfect. The regulatory aspects of managing a remote business can be a bit of a buzz kill. Not only have regulations *not* adapted and evolved to the new realities of business and remote employment, but in some cases, the changes being made are pulling things back into the dark ages. Okay, not really—but it sure feels that way at times!

A FEW THINGS WE'VE LEARNED ALONG THE WAY

Every situation is going to be different, but our hope is by reading about how we've approached various aspects of running a remote business, you'll be able to glean some useful tips for your own situation.

Company policies

At times, we've debated limiting the jurisdictions of our footprint to streamline compliance. But, we've opted to make decisions that are best for our business and hire the best talent we can at all times, which to us, justifies the associated administrative legwork and costs. We've dissected the cross-section of the most strict rules and applied them across our entire business so we operate based on a single set of policies.

> ⚠ **Pro tip:** To shortcut your research on the topic, if you're compliant with California employment and labor laws, you're probably going to be compliant across most other locales. *But*, be aware some cities have their own taxes and labor laws.

Even just knowing what the rules are and figuring out which government entity is associated with which set of rules and what type of expert you need to consult—let alone actually doing the work to comply—is truly an investment. You'll need to budget for additional overhead costs associated with figuring it all out.

Even as a small business, within our first few years, we've consulted with a local CPA, a CPA that deals exclusively with multi-state taxes, a general attorney, a labor law attorney with multistate expertise, and an HR consultant with multistate expertise, a fractional CFO, and a finance manager. Fortunately, all of this compliance is still way cheaper than paying for office space in an expensive city! *Translation:* A greater % of our cost can go toward paying talent to deliver our clients with excellent service, and in investing in business improvements.
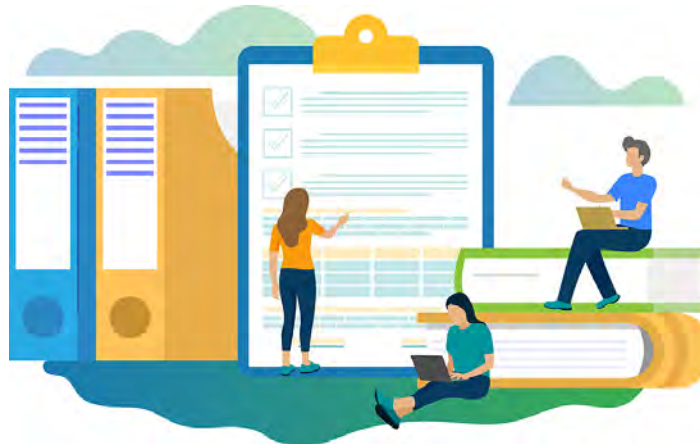
For every state in which you have an employee, you need a relationship with (at a minimum) the state employment department, department of revenue, and state tax entity. You can quickly see how even for a small team, you could suddenly rack up a huge overhead in managing paperwork. We have found Gusto Payroll software to be helpful in this regard.

Of course, hiring contractors is a lot easier than hiring employees from a regulatory standpoint. But, you can only do this if in fact your contractors are truly operating as a vendor, they have their own independent business outside of yours, and you treat them as contractors.

Compensation

As more people realize they no longer have a reason to pay expensive rent, they'll move to cheaper markets. Some companies will be tempted to pay less as a result. But why? Think of the value people bring to the business—and pay accordingly! We may see a normalization to salaries as remote truly becomes the norm and businesses realize employees living in an expensive cost-of-living city does not drive additional value to the business. At Apiary, we work primarily with independent consultants who set their own rates, but we recognize this wouldn't make sense for every organization.

Important disclaimer: *We are in no way legal experts—we absolutely encourage you to consult your own experts (as we did)!*

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