



# How to Build a Remote Team: Strategy & Best Practices

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Accountingfly

Employees have WON! Great talent gets to pick their opportunity in today's job market as every firm is looking for qualified people to relieve the burden of work and to help drive revenue while increasing bench strength. With that said, how will you compete? Will you even toss your name into the ring and get creative to ensure your firm wins the talent war?

You should. Why? It's more fun.

**It's more fun to: win, grow, learn, mess up, try, figure it out, win.**

**It's less fun to: lose, stay stagnant, grow by luck, get fired by your employees, lose.**

This content series seeks to point out one facet (amongst many) that can help you win the war as it relates to talent. This one facet is "Remote" - the ability to have employees work and thrive in a culture that embraces and enables remote workers.

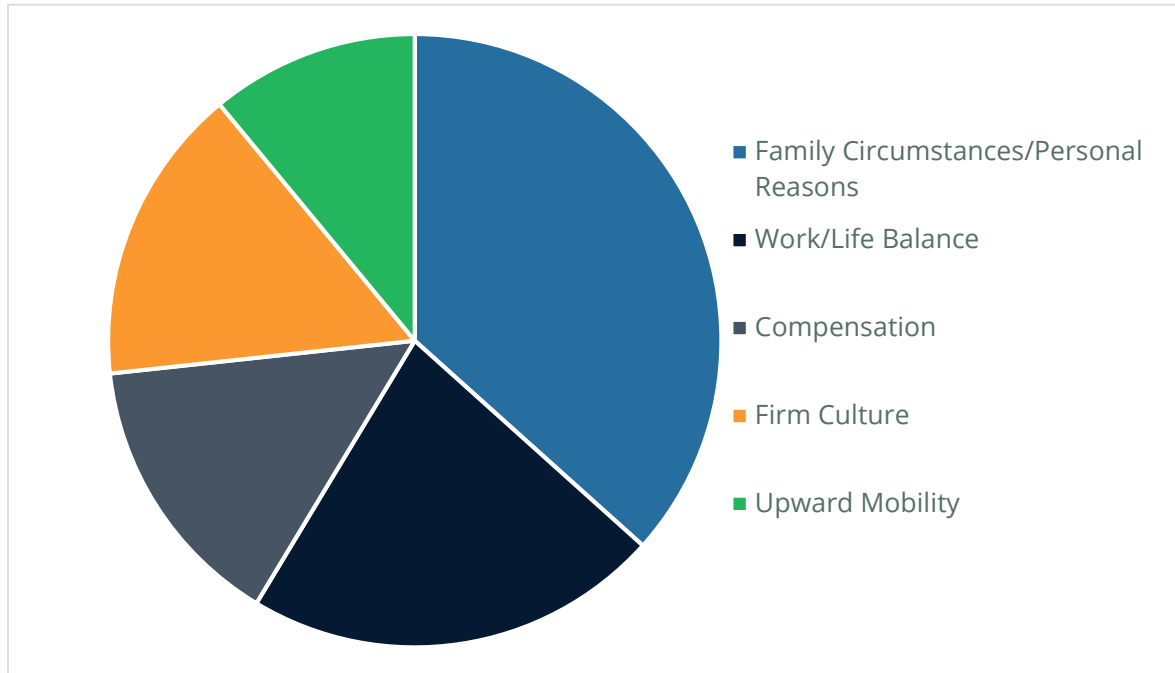
Remote can mean working from home every other Tuesday to take my kid to piano lessons that I have been on a waiting list for two years to get into. Remote can mean your firm is in Texas and an employee wants to live and breathe the fresh air in Glacier, MT. And remote can mean everything in between.

This resource is broken down into three main sections. We encourage you to take our ideas and apply them in your own unique way.

Let's go!

## The Challenge: A Sweeping Change in Work Preferences

Why is it so hard to hire and retain Accountants? It's time to accept that this is not a fad. Demand for private or company jobs appears to be at an all-time high. Turnover of professional staff is at 17%, which is the highest in a decade, and many firms appear to be giving up on hiring experienced Accountants altogether – saying there is no talent available for them to hire. We don't believe this is the case, but rather, a change in strategy is what's required.



The 2016 Boomer Consulting survey on retention, [Drivers of CPA Firm Turnover](#), provides insight into why Accountants are leaving firms and where they are going. Mostly, it shows that the talent is leaving for company/private jobs, and work-life balance is a primary motivator (Figure 1). The good news is that firms can control and improve retention, and we believe that remote work is one of the primary strategies to solve the problem.

Among the other factors contributing to the failure to hire Accountants is that firms lack the in-house staff to work and engage the candidates who are interested in joining their firm. Firms that don't have applicant tracking systems, or who aren't using appropriate marketing strategies to recruit candidates, have a poor chance of landing a hire. Also, firms must take a realistic look at where the talent wants to work – "A" players are attracted to "A-level" organizations that offer the right mix of promotion and economic opportunity, along with culture, vision and HR policies that attract the best. Financial talent often sees the opportunities in private industry as a better fit for their life than in public accounting. Again, these are all factors that accounting firms can control.

The phrase that comes to mind here is Albert Einstein's definition of insanity: "doing the same things over and over but expecting different results." If the

*Figure 1: Drivers of CPA Firm Turnover: Results of Boomer Consulting, Inc.'s 2016 Attrition Survey; Boomer Consulting, Inc.; 2016*

market for talent has changed, then the strategy to capture talent must change. A few examples of the “same things over and over” include:

- Posting jobs on newspaper websites or ineffective job boards that don't cater to professionals, such as Monster and CareerBuilder.
- Not having the staff in-house to pursue and “work” candidate leads.
- Not investing in recruitment branding.
- Expecting to post a job description without researching what “sells” candidates.
- Not investing in technology, like applicant tracking systems, to automate candidate work.
- Keeping old employee retention tactics and expecting staff to stay.
- Not offering flexible work arrangements.
- Keeping the same PTO and maternity/paternity policies.

A final but important change is that not everyone wants to be a partner in an accounting firm. Many don't – just look at how the Big 4 hire and expect staff to put in a few short years then leave for industry. Some firms embrace the fact that talent will use accounting firms as a stepping stone to private opportunities. These firms realize that they can make shorter-term hires, create a workable relationship, and expect the attrition that normally comes. But they change their own talent model to be constantly filling key roles to compensate for the attrition. By the way, this may not be a bad thing for partners, and it has worked very well for the Big 4.

#### **What Are the Options to Consider?**

Change your expectations. Are you an A-level employer? If not, reset your expectations for the caliber of talent that will want to work at your firm.

Bring in consultants. Backfill your projects with Accountants on-demand who can get the projects completed, and to your standards, without having to add permanent headcount to your firm.

#### **The Rise of Remote Work**

According to [Accountingfly](#), in 2016, demand for remote jobs was very high. Their data showed that remote/work-anywhere accounting jobs received eight times more applicants than traditional in-house positions.

While this is promising news for accounting firms, it requires a wholesale change to hiring, managing and keeping employees productive and happy. It's not easy, but it's a pathway to building the right team and growing your practice.

#### **Start with a Test**

If you're interested in building a remote team, it's best to start small so that you can begin to implement the policies and process over time. [Here's](#) HPC's CEO Bruce Phillips talking about how they made the change to remote team and what they learned in the process.

## Think About Technology and Process

How the team communicates will change once you add remote staff. You'll be managing completion of tasks in a very different way, so it will be time to look at office communication tools like Slack, and project management tools like Asana or Basecamp that coordinate remote workers to complete the project. You'll need to plan out how to build a culture in a remote team, and how to loop in the remote staff into the culture of the existing team.

Since you'll have one, or a few, remote workers at first, one major decision up front will be what to do with your existing team. Our suggestion is to make that decision prior to making your first hire. One best practice would be to create a work-anywhere policy on a limited basis with your existing team, and phase that in over time while you introduce staff to the new way of working at your firm. We'll explain more about this process later.

## Pros, Cons, Opportunities and Risks

The greatest reason for embracing the shift to remote work is that you will be operating a modern firm that talent is attracted to. You'll make hires. Once you've built a program that works for remote and in-house staff, your team will love the flexibility that is available at your firm. The pool of talent gets much larger and goes beyond your location, which means you'll have an easier time hiring Accountants.

The greatest risk to consider is that some of these remote hires will not work out. Remote work is not for everyone. It's best for self-motivated professionals who are willing to work harder overall in exchange for a lifestyle that they want.

The other risk is in making a few remote hires but not changing the overall structure to be more remote-friendly and flexible to the entire team. Add in the right new processes, measure, and improve, in order to quickly innovate into the type of company that is desirable to work for and stay with.

## The Structure

I have been a part of numerous conversations with all firm sizes on the topic of remote employees and why it does or doesn't work. The reasons it does or doesn't work are across the board, but the common denominator I see in all these conversations is whether the leadership of the firm is taking it seriously or not. It could boil down to not being a priority, or it could be that the culture of the firm is completely closed off to any kind of change... it all boils down to leadership.

Transitioning to the topic of structure, below are suggestions on how to structure and enable remote employees to thrive in your firm. However, if the leadership in the firm is not aligned or weak, it won't matter one bit to have a few good ingredients, because the main ingredient is sour.

Here are a few realistic scenarios that I believe are worthwhile discussions and can be expected:

**Scenario 1:** Your firm is in a large metro area you need to be able to offer remote as a perk to be able to compete and win on the talent front.

**Scenario 2:** You are about to lose an employee due to a spouse relocation.

**Scenario 3:** Someone is about to have a child and they need to find a more flexible work option.

**Scenario 4:** Your firm needs talent and it doesn't matter where they are – you are growing (or can grow) and are willing to find talent anywhere.

## Is the Person a Good Fit to Work Remotely?

"I work better with the TV on" is probably not what you want the person who works from home to think about themselves. It goes without saying that working remotely or from home is not for everyone. There are several personalities that cannot survive, let alone thrive, remotely. So, what makes for a good remote employee?

**Trustworthy.** This goes without saying but must be said. You must have a great gut about that person in order to have that baseline trust that is needed.

**Doer.** Do they just get things done? Do they have a great track record of meeting deadlines and can grind when it's needed? If that person is extremely task oriented and good at managing their time, they can likely do well working remotely, and possibly even produce better work.

**Self-aware.** All of us know that person who over estimates his/her own ability and consistently comes up short. Good remote employees are very self-aware and conscious of their own pitfalls. They don't need to be perfect, just aware of those flaws so they can be their own monitor.

**Communicator.** The person must have good written and oral skills and possibly even over-communicate. Keeping people in the loop in a clear and concise fashion is critical.

In any case, there should be a trial period, if possible. The employee should work remotely for 2-4 weeks and come back with what is working and not working. Ideally, this can be a quick, in-person presentation in front of the partner group (or just a few partners) so that everyone is bought in and aligned.

## Proper Incentives & Management Structure

Like every human being, there must be proper motivation to do anything. Like every organization, there must be proper accountability to understand and measure motivation. What's the best use of everyone's time when it comes to managing remote employees?

Here are a few suggestions on putting the proper rails for any remote work solution:

**Self-evaluation.** Put some of the management on the employee. Ask for a quarterly self-evaluation that is due approximately a day before your quarterly meeting (discussed below) with that individual.

**Quarterly Reviews & Goals.** In line with the above, you should have an hour or two on the calendar each quarter to focus on how that period went. A few suggestions for the meat of these meetings:

- Review the self-evaluation.
- Review last quarter's goals. Each remote employee should have 3-5 substantial goals on top of the normal work routine (things that can be measured and assessed).
- Set goals for the next quarter.

**In-person Meetings.** Ideally, the quarterly reviews can be timed accordingly so they can happen in person. Setting expectations on how many days each employee will be in the office a year is ideal. We like 12-16 days in the office a year...so 4x a year they come in 3-4 days at a time. It's ideal to time this with company parties, events, or big projects. Yes, this adds to cost if that employee needs to fly, stay in a hotel, etc.

**Coworker Survey.** Survey 3-5 employees 2x a year on certain remote employees' performances. It can be anonymous if needed. Questions might include: Is this person contributing to the team? Does his/her current work situation create extra work for you? How would you rate his/her overall performance?

\*This could be implemented across the whole team.

\*\*These surveys could drive a percentage of their annual compensation if you really want to ensure that remote employee really takes being a team player seriously.

**Policies.** What policies should your firm have in place? Besides a standard employment agreement that covers the basics of being a good employee, you should have one overarching "Remote Employee Policy" to address the nuances of the situation. For some people, policies are only useful for managing people you don't trust. I do not think that's the case, rather, it ensures expectations and establishes a baseline.

**What Do the Numbers Say?** The benefit of being in a "standard" accounting firm is that there are well-known KPIs, namely utilization and realization, to measure performance. Remote folks should be held to the same standard that in-office employees are held to. Let the numbers talk. If they are not making their numbers, then you have a decision to make. It's no different than any other employee.

## Technology Suggestions for Successful Remote Work

**Captain:** Storm the castle!

**Soldier:** But Captain, I don't have a ladder to climb the wall nor a shield to protect me. Oh yeah, I don't have a weapon either!

**Captain:** Storm the castle!

You simply can't have the wrong technology in play with remote employees and expect them to survive/thrive in the environment. Remote offices struggle mightily in many multi-location firms, and remote employees get even less love because their gripes don't have a multiplication effect. Below are suggestions related to having the right setup for remote employees. Some are optional. Some are as basic as water and air, in the scheme of things.

**Core Infrastructure.** Your firm's core infrastructure should be able to be accessed from anywhere and act, feel, and look just like every other employees' experience with the technology. Whenever there is a difference, there are interferences. You can't train the same



way, you can't launch new technologies the same way, and the list goes on. Every difference between an in-office employee and a remote employee is noise in the system. What does this look like?

- You don't use "GoTo" products. i.e. you are not using your home computer to log into your work computer.
- You launch a virtual desktop or applications via a portal, i.e. you have no data on the machine.
- You can save work directly to mapped drives vs. having to use a VPN or wait until you get into the office to get the file in the right place.

**Internet.** Most metro areas now have sufficient internet at a very affordable price, and it can be assumed that it will work. Rural areas... not so much. There are still tons of gaps in reliable service, especially when a major carrier is absent. This needs to be a consideration and known before going into the situation. This is where the trial period mentioned above will prove useful.

**Home Setup.** My neighbor has the same internet provider as me and is on the same plan but always complains of the speed. Eventually I asked him where the wireless router was. It was in a media cabinet in a corner on the middle floor and his office was on the other side of the house on the top floor. Basically, his performance was shot due to location of office and/or the router. This situation was completely preventable but caused all kinds of frustration when he worked from home. All this to say, below are a few suggestions to ensure the home office setup is ideal.

- Your home office needs to be within a couple of rooms of your internet router.
- Internet: Ideally you can get 25mb down with 5-15mb up from a reputable provider.
- If you can be hardwired in that is ideal but is often not possible due to age of home, etc.
- Your space needs to be able to have enough room to have 2-3 monitors (on a legitimate desk) or one big monitor (my preference).
- Laptop + docking station. I think desktops are 1998 and laptops are the only way to go. Nothing can convince me otherwise.
- Softphone: no actual phone device but a piece of software that ties into your phone system, and to an outsider, no one would know a difference.
- Plantronics headset: get a new one with great noise cancellation.
- If you have a binge watcher in the house be careful, that Netflix steam could kill your productivity.

**Water Cooler Technologies.** These are the types of things that replace those "water cooler conversations" that are standard place in any work environment. One of the reasons why so many people like to work from home is that they can avoid some of the time wasted in these conversations. As you know, these conversations are crucial to culture and, ideally, we can find a way to help bridge the gap that exists with anyone working remotely. Below is a list of things to Google for yourself.



**Intranet Meets Facebook/Twitter**

Hipchat: Group chat + video chat + screen sharing. This is a great tool, especially for the price: free or \$2/user/month. It has various “rooms” for different teams to interact in.

Slack: It's very simple and streamlined; it's a favorite of many people looking to reduce email clutter across teams.

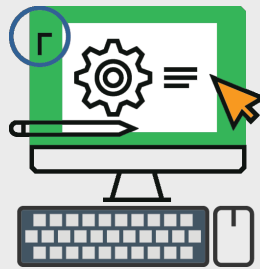
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