TO BE, OR NOT TO BE, REMOTE?
Examining the essential factors needed for ongoing remote work success

INTRODUCTION

During the COVID-19 pandemic, approximately one in every three Canadians were working from home. This is almost three times more than those who worked remotely, at least occasionally, in 2016 (Mehdi & Morissette, 2021). Although it has been an adjustment, many people have appreciated the extra flexibility and are hoping to continue the work arrangement to some degree after the pandemic subsides. In fact, a Canadian Labour Force Survey conducted in February 2021 found that 80 per cent of new remote workers would like to perform at least half of their hours remotely once the pandemic is over (Mehdi & Morissette, 2021). Shifting to a remote model during an emergency is one thing but building an intentional remote work strategy is quite another. As stay-at-home orders come to an end, organizations are contemplating if, and how, to incorporate remote work options going forward.

These days it is hard to browse the internet or pick up a magazine without seeing an article on remote work. There is an abundance of information out there, but much of it is anecdotal which alone can be a poor basis for strategy development. This policy brief offers leaders a research-informed framework from which to consider their readiness for supporting a remote, or hybrid, workforce going forward. The brief begins with a review of literature on remote work's benefits and challenges. This is followed by seven overarching factors that should be deliberately addressed when building a workplan that involves at least some people working away from the physical office. These seven factors were systematically determined from themes in interviews with remote workers, as well as other research findings on telework. After presenting each factor we outline several questions that business owners and managers should consider in determining their organizations readiness to support a successful remote work environment. Contributions from this brief include insight that will assist leaders in determining their work plan post-pandemic; clarity for those who wish to support remote work teams; and extensions to the literature on remote work in general.

THE PROS AND CONS OF REMOTE WORK

Remote work offers a variety of benefits. Some meta-analytic research and labour force surveys have found that people can be as, or more, productive at home based on both employee-reported and supervisor-rated job performance (Allen et al., 2015; Gajendran & Harrison, 2007; Harker Martin & MacDonnell, 2012; Mehdi & Morissette, 2021). Working from home gives employees more flexibility in arranging schedules, more autonomy over their work environment, saves time on commuting, and offers potential cost saving on professional clothes, travel, and eating out (Allen et al., 2015; Mello, 2007). Some researchers have found that remote work leaves

employees with less stress than their office-located colleagues (Gajendran & Harrison, 2007; Golden, 2006b) and with better work-life balance (Anderson et al., 2015; Fonner & Roloff, 2010; Wheatley, 2012). Many studies indicate that people experience greater job satisfaction when they have the option to work remotely (Manochehri & Pinkerton, 2003; Stephens & Szajna, 1998; Tremblay, 2002). Additional benefits to allowing people to work outside the physical office may include a reduction in overhead costs for the organization (Cho & Choi, 2019) and an improved ability to attract and retain diverse staff. Remote work may also be better for the environment as it can lead to reduced energy consumption and traffic congestion (Allen et al., 2015; Pearce, 2009).

Remote work is not ideal for all people and all organizations, however. Productivity boosts aren't guaranteed. A Statistics Canada report (2021) found that 58 per cent of new teleworkers reported being equally productive per hour as when they were in their regular office while 10 per cent reported being less productive. Slightly more than a third of the respondents also indicated that they worked longer hours than they did in the past. The flexibility that works for some people can also make it hard to disconnect at the end of the day as lines are blurred between work and personal time (Barber & Santuzzi, 2015). Extra hours can negatively affect employee well-being which can lead to decreased job satisfaction (Barber & Santuzzi, 2015; Delanoeije et al., 2019; Golden et al., 2006). The Statistics Canada report

found that a lack of interaction with co-workers and other barriers to coordination and collaboration were common reasons for reduced productivity. These same productivity barriers were identified in other studies as well (Lupton & Haynes, 2000; Lowry et al., 2006; Taskin & Bridoux, 2010; Turetken et al., 2011).

The isolation that people can experience when they are separated from colleagues is a well-cited challenge to distance working (Golden, 2006a; Makarius & Larson, 2017; Sardeshmukh et al., 2011). A lack of visibility can also lead to decreased opportunities for training and advancement in some cases if managers are not attentive to this challenge (Felstead et al., 2003; McCloskey & Igbaria, 2003). Organizational overhead costs may not be reduced in all cases, and the reduced carbon footprint of remote work can be reversed if, for example, people engage in more air travel for company retreats or do more errands by car when working from home (Allen et al., 2015; Wilde & Buritica, 2021).

Undoubtedly some organizations and people can experience immense benefits from a remote, or hybrid, work arrangement. However, the mixed findings in our review, and our own research inquiry, suggest that success depends on the characteristics of the organization, the people, the assigned tasks, and whether the right supporting structures are in place when people work away from a physical workplace.

REMOTE WORK IN NIAGARA

Methodology

In Niagara it is estimated that just over 70,000 people were working primarily at home for the first time during the pandemic[1]. Meanwhile, labour force reports indicate that about one third of Ontario businesses anticipate some remote work to continue after the emergency ends (Mehdi & Morissette, 2021). To help small businesses and nonprofits design a work strategy that meets the needs of their unique situation we reviewed research findings on remote work and conducted interviews.

Specifically, this policy brief describes findings from a 2021 research inquiry that examined the essential factors needed for remote work success. In this study we scanned the Canadian policy and labour force literature, research on benefits and barriers to remote work, and best practice articles in leading remote teams. In the spring of 2021, we also spoke with 14 executives and employees, as well as 13 interns who faced the challenge of joining organizations virtually over the past year. The people we spoke to were from 24 different Ontario-associated organizations and all but two organizations were in Niagara. Participants in the study were asked open-ended questions about

[1] *Using a method established by Dingel and Neiman (2020) to interpret an industry's remote work capacity, and with workforce data from Niagara, we found that a potential 72,860 workers in Niagara complete tasks that potentially could be performed remotely. Dingel and Neiman (2020) used O*NET-derived baseline and manual assignment to determine the percentage of work in each standard occupational classification (SOC). We applied data collected in the 2016 Census on National Occupational Classification (NOC) in the St. Catharines-Niagara Census Metropolitan Area to the average between both the O*NET-derived baseline and the manual assignment to find the potential amount of Niagara employment tasks that can be completed at home. (Note: the St. Catharines-Niagara CMA does not include Grimsby or West Lincoln.)*

their experience of working remotely, what barriers they faced, and what they felt was needed to be a successful remote worker. The following sectors were represented: professional, scientific, and technical services (nine organizations); public administration (one organization); health care and social assistance (seven organizations); arts, entertainment and recreation (two organizations); retail trade (two organizations); and educational services (three organizations). Some of our interviews took place over video conferencing software and some were in written form. Video interviews were transcribed using a closed captioning function. One researcher and two assistants organized the ideas described in the transcripts by hand using a systematic method informed by hermeneutic phenomenology and other processes of interpretive data analysis. Findings were combined with global surveys of remote work practices and the research literature as an additional data source.

Seven themes were identified to help organizations craft a remote work strategy: Fit, Tasks, Communication, Relations, Organizational Culture, Tools, and Support. In this brief we describe the themes interspersed with participant quotes (edited for clarity) to create a rich and coherent understanding of the nuances of supporting remote work success. Each theme concludes with questions that management should consider before deciding on a permanent remote work plan.[2]

FINDINGS: ARE YOU PREPARED TO SUPPORT REMOTE WORK OVER THE LONG-TERM?

Fit

Some people love remote work and others dislike it. Flexibility and autonomy are commonly cited benefits to working from home (Allen et al., 2015; Mello, 2007). An individual we interviewed said, *"I enjoy working remotely, as I love being in the comfort of my own home, having more freedom, and having the space to figure out tasks on my own."*

Eliminating the commute, and the ability to gain extra time with family are appealing to many people (Mello, 2007; O'Neill et al., 2009). One executive we spoke to explained, *"My biggest problem with an office is the wasted time… I have a daughter—she's two years old—I realize that extra two hours could be allocated to spending time with her."*

Almost everyone we spoke to could list benefits to working remotely while some people said they would still prefer to work in the office. This person's feeling about the importance of interacting in-person to get a sense of who people are, and build friendships, was reflective of many who wanted to get back to the office—at least to some degree. They explained, *"Working with people that I like and whom I have mutual respect with is very important to me, so when I was unable to meet anyone face-to-face or talk with anyone about anything outside of our work, I was frustrated."* Another person spoke about the energy of being physically together: *"I think there is something about being in-person in the right atmosphere that is inspiring."*

Many people felt that work intruded too much into their personal life when they did it from a home office. One of the people we interviewed said, *"Working remotely took away some of the boundaries that we have when we physically go to work. I didn't have those time and space boundaries that allowed me to create a better work-life balance."* Another person noted, "*Now the computer is always next to me so there's always that constant, 'oh you should be working'. Anywhere in the house it's always on my mind, there is no break."* Personality and priorities can have an influence on whether remote work is a good fit.

Personal attributes and skills also make a difference in whether people perform well at a distance (Makarius & Larson, 2017). The autonomy inherent in working from home means that employees need to be able to self-manage (Allen et al., 2015; Makarius & Larson, 2017). One interviewee explained, *"You need to be comfortable with autonomy and know what to prioritize. You have to be relatively disciplined and have good time management without someone watching over you all the time."* It's harder to ask questions of a colleague when people are distributed, so remote workers also have to be resourceful, good problem solvers, and adept at learning things independently (Gajendran et al., 2014; Grant et al., 2013; Mello, 2007). An interviewee commented, "*I had to come up with new ways to solve problems on my own. This could mean trusting my instincts, creating a different plan, or thinking about a problem from a different angle."*

Although remote work takes independence, staff must also be skilled at collaborating, coordinating with others, and proactively sharing information—all of which are more challenging when working remotely (Cramton & Hinds, 2004; Makarius & Larson, 2017; Staples et al., 1998). Of course, comfort with technology, or a willingness to learn, is also a required skill in remote work arrangements (Beise et al., 2010; Kurland & Bailey, 1999). All these skills and dispositions are valuable in any context, but the need for them is heightened when communicating from a distance and across time.

Some questions to consider:

• **Is remote work a good fit with employee personalities and priorities?**
• **Do employees have a quiet home office space and a fast, reliable, and secure internet connection?**
• **How will we help staff combat the isolation?**
• **How will we ensure everyone feels like a valued and equal part of the team if some work remotely and others don't?**
• **What do we need to know from employees about what they need to succeed?**

Tasks

Not all people want to go remote, and not all roles can be done outside the traditional workplace. In fact, researchers have estimated that approximately 61 per cent of Canadian jobs cannot be regularly performed away from a specific location (Deng et al., 2020). Particular tasks may also be more or less suited to remote work. For example, some tasks must be done on location or require specialized equipment that cannot be set up at home (Pearce, 2009). Shared work that involves tacit knowledge or hands-on learning can also be difficult to do remotely (Kurland & Bailey, 1999). Junior-level roles that require much higher levels of mentoring can be challenging in a remote environment. On the other hand, tasks that are a good fit for the focus and flexibility of remote work include those that require deep problem solving, uninterrupted concentration, and individual effort (Bailey & Kurland, 2002; Gallup, 2020). Tasks that are well-defined with clear timelines, expectations, and evaluation measures tend to be more successful in remote work arrangements as well (Beise et al., 2010; Konradt et al., 2003; Makarius & Larson, 2017). Collaborative work can be accomplished remotely but it requires extra coordination, more feedback, and more attention to group processes (Crisp & Jarvenpaa, 2013; Munkvold & Zigurs, 2007; Cummings et al., 2009; Rutkowski et al., 2007).

Some questions to consider:

• **Is remote work a good fit with client and customer needs?**
• **What primary tasks within each role are suitable for remote work?**
• **Are there issues—security, legal, or other—with letting work materials leave the physical office?**
• **Are the resources and climate needed to support interdependent and collaborative work in place?**
• **What additional training might employees need to perform their roles well remotely?**

Communication

Once it has been decided that remote work fits well with individual employees, organizational functions, and the nature of the work, the right structures must be in place to create a virtual office in the absence of physical walls. The first concern is ensuring clear communication, as this becomes more challenging when workers are distributed (Beise et al., 2010; Ilozor et al., 2001). Visual, verbal, and other contextual cues that help people interpret messages are reduced or absent. One interviewee said, "*When typing you can't tell what somebody's voice is... if they're happy, if they're sad… emojis and things like that just show that you're not just being completely blunt. So, I think that's definitely one of the biggest struggles.*" Another person commented, "*I feel like I'm more disconnected from my co-workers working remotely than I was before. Just knowing about what's going on in their lives can sort of help you manage people better, like when you know that they may be dealing with something difficult at home… so maybe you don't bug them that day.*" It is useful to err on the side of over-communication and share concerns, priorities, and work styles to help co-workers interpret silence and understand the words and implied meanings in day-to-day interaction (Davis & Khazanchi, 2007).

Keeping everyone informed about what is happening across the organization is essential for building a feeling of cohesion and creating the mutual knowledge needed for workers to successfully meet interdependent goals (Davis & Khazanchi, 2007). Employees can't overhear a conversation, observe an interaction, or gain a feeling for what's going on when they aren't working together in the office. Uneven or delayed information sharing is a common communication problem when team members work apart from each other (Cramton, 2001). One interviewee commented, "*We work in a small office. It's an open concept, so we hear everything everybody's doing all the time. That's how I get a lot of my information. With that gone everything has to be intentional, and a lot of times we don't always think to tell everyone everything.*" In a hybrid work model, it can be hard to avoid sharing project updates through spontaneous hallway conversations and defaulting to in-person meetings that disadvantage remote employees. A conscious plan is needed to keep everyone equally in the loop.

The review of remote work literature shows that successful teams require explicit guidelines or rules of engagement. One junior intern agreed, telling us that she had learned the importance of "*establishing formal plans for remote communications practices such as the preferred platforms for communication and schedules for regular virtual meetings.*" Other topics to include in an organization's communication plan should range from establishing norms for how to manage conflict and build psychological safety, to expectations regarding availability, and which digital communication tools to use for what purpose (Geister et al., 2006; Massey et al., 2003; Paul & McDaniel, 2004).

Some questions to consider:

• How will we discuss and document communication and decision-making norms?
• When and how often should we share organization and team-wide information, so everyone is in the loop?
• When should a video call be used rather than a quick text, and when should communication be in real-time rather than asynchronous?
• How do we protect people's time while also supporting frequent and open communication?

Relations

Just as there should be plans for clear communication; relationship-building must also be more intentional when people don't see each other every day. Studies show that those who feel they have friends at work are more likely to enjoy their job, feel invested in the company, support others, and perform well (Beise et al., 2010; Mansour-Cole, 2001; Panteli, 2004). Social bonds help workers give each other the benefit of the doubt when there is miscommunication and when they are working on shared projects separately (Hinds & Mortensen, 2005: Makarius & Larson, 2017).

Work friendships also meet the essential human need to belong (Deci & Ryan, 2000). One employee we spoke to said, "*I do think that the social culture is missing [when remote]. It's really hard to get to know someone and feel comfortable with a team when you're just a little dot on*

the screen. I do miss those pieces… that five minutes in the morning to catch up with a coworker, you know… just the silly stuff that has nothing to do with work but that's a part of your life, and it's kind of like the silver lining. We try to make time to do those things online, but if you don't know somebody, you're not going to get to know them very well in limited amounts of time."

Relationships are built through spontaneous informal conversation and get-togethers that happen naturally in the physical workplace. Online conversations tend to be more task focused. One employee noted, "*When you do connect, it is sort of like, 'OK specific question, specific answer', and you don't get to feel things out as much.*" A concerted effort must be made to provide space for relationship-building and informal dialogue to recreate office connections regardless of where employees are located.

Some questions to consider:

• **How will we get to know each other as people when we spend less time together?**
• **What role do serendipitous and informal encounters play for us and should we try to recreate those moments in a new way?**
• **How will we help new employees build social networks if they are remote?**
• **What type of team-building and social activities do employees want to see?**

Organizational Culture

Even a strong in-office culture will need to evolve with the addition of remote work arrangements (Manochehri & Pinkerton, 2003; Mills et al., 2001). Organizational culture is the collection of stories, traditions, values, and expectations that sets the context for everything an organization does. When working together in an office, the culture is transmitted through behaviours and visible elements such as how people dress and how physical space is allocated. As one interviewee mentioned, "*I think just the exposure to our space actually tells a lot about the company and the work that we do. So, just getting that background, versus only having access to our website to learn about our history [is difficult].*"

When interactions occur remotely and practices are sometimes hard to observe, it is useful for leaders to call attention to which aspects of culture are being drawn upon, and why, as decisions and actions are determined. It is also helpful to have clearly documented organizational vision, values, and procedures so that employees can prioritize and make independent decisions effectively when they are distributed.

Organizational culture is also conveyed through the onboarding process. It can be harder for remote workers to gain both official and non-official knowledge about how things get done. One individual mentioned, "*I found it difficult because as much as you can have a video call and explain tasks or explain parts of the company and how they work, it's really hard I think for someone who's completely fresh to get a true full spectrum understanding of what goes on when we're all working digitally… I think [it] has been one of the biggest challenges*." It's not enough to teach someone a process or policy; the cultural values that give context to the practice need to be communicated, too. This may mean being more explicit in training. It can also mean changing the training timeline so the culture can be explained in context as new employees get into their specific day-to-day tasks.

One of the supervisors we interviewed described their process of bringing someone on remotely: "*I did onboarding a little bit differently remotely. So, I planned it out more and I had more of a long-term game. I focused on starting with the culture and the bigger picture of the organization and then got down to the nitty gritty. I started with very small*

bits of information and rolled it out slower instead of 'here's everything all in one day'." Onboarding typically includes organizational and technical training but it should also include added attention to integrating the new employee into the social side of the organization which can be more challenging when remote (Felstead et al., 2003; Gitlab, 2021).

Tools

Choosing the right technology to support remote work isn't just about recreating office practices, rather it should be based on what will best support the people, tasks, communication, relationships, and culture of each unique organization (Gitlab, 2021; Makarius & Larson, 2017). Each technological platform and tool comes with distinct benefits and limitations.

Video conferencing is considered the richest form of technology as it allows people to obtain visual and vocal cues, whereas text-based communication is considered 'lean.' Richer communication technologies provide more information that helps people build relationships and exchange more complex content. Some people might believe that richer forms of communication are always better, however they tend to require synchronous interaction which can take away some of the flexibility of being remote. 'Zoom fatigue' when people take part in back-to-back meetings all day without any physical movement or downtime, can also be a drawback to constantly turning to rich forms of communication.

Leaner modes of interaction should not be overlooked in setting up norms for communication. Lean modes can be the best choice for simple or less formal conversation when teams already know each other. Less intrusive tools like email and document sharing also work well for recordkeeping and scheduling communications. One person commented on how they appreciated always having a document to return to: "*In person they might ask me to do something...and [after] I think I'm not sure whether he wanted it that way? Whereas remote, they know the best way is to put it on Slack so it's always there for me to access so instructions are not misunderstood.*" Shared documents provide members with records of actions taken and planned, but they also provide a sense of the virtual team's history which will help transmit organizational culture (Beise et al., 2010).
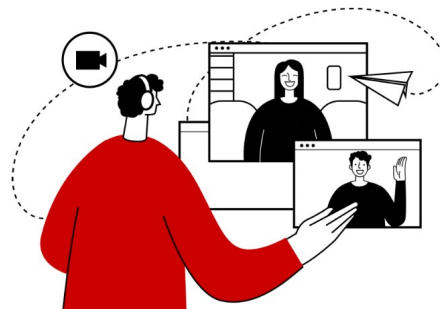
Support

Supporting people remotely relies on many of the same leadership principles as office-based management; however, there are additional challenges to consider (Felstead et al., 2003). The research is clear that collaborative remote work must begin with trust (Crisp & Jarvenpaa, 2013; Grant et al., 2013; Paul & McDaniel, 2004). A manager of a remote team should become a coach, facilitator, and mentor rather than a micromanager (Dyer & Shepherd, 2020). One of the supervisors we interviewed said, *"The major change is just that it's a little bit harder to oversee exactly what people are doing at all points in time. You definitely operate more on a system of trust than I think we did in person. We always trusted our staff, but you have to have more of that. You know, I can't see them, so I'm just hoping that they're doing [what I expect]."*

Since it is almost impossible to observe if employees are working or not, remote work calls for a shift in focus from activity to results (Cooper & Kurland, 2002; Konradt et al., 2003). To achieve results at a distance, employees should operate from a shared understanding of clearly defined objectives and desired outcomes, and know how their work integrates with the rest of the organization. One leader we interviewed talked about the importance of ensuring that remote teams connected their work with the big picture: *"Our teams are always cross-pollinating with each other and whenever we have meetings, I am very conscious of making sure that everybody can see the long-term vision—the goal—of where we're all trying to head to."* Studies have demonstrated that clear communication of goals, responsibilities, and expectations lead to greater job satisfaction, productivity, and loyalty among remote workers (Ilozor et al., 2001).

High levels of consistent communication between leaders and team members are positively related to trust and engagement within virtual teams as well (Gajendran et al., 2014). Many of the people we spoke to noted the importance of full team meetings to share updates and build a sense of cohesion. One person said, *"The use of Zoom meetings with everyone from within the organization was like a reset as it got everyone up to speed, and back on the same page."* When employees are remote, it can be easy to feel disconnected or even invisible to the rest of the team or organization—especially if some employees are in a physical office and others are remote. Regular meetings provide the opportunity to recognize others and reinforce a supportive culture as well. One junior worker spoke about how their employer did this: *"We have weekly meetings as well and we do this thing where it's called props time. So, you give anyone in the company a compliment or a prop when they've done something. I had the opportunity to actually thank my managers and whoever has really supported me that week or that month."*

Clearly articulating relationship expectations for team members by showing support, empathy, and understanding plays an important role in a remote workplace (Kayworth & Leidner, 2002), and reducing tensions when people don't see each other regularly (Wakefield et al., 2008). It's not possible to just drop by an employee's desk when remote, so supervisors must become more purposeful in providing information and feedback while making it part of a regular routine. Support should extend to encouraging healthy work practices (including disconnecting at the end of the day) and addressing the concern that remote employees don't have the same access to development and advancement when they are not visible to their managers (Felstead et al., 2003).

Some questions to consider:

• What additional training do managers need to support remote employees?
• Will remote employees have results-focused performance metrics?
• When, and how, should check-ins and full team meetings happen?
• How will we support remote team cohesion?
• How will we support employee well-being?
• How will we ensure people working remotely receive equal training, development, and opportunity for advancement as in-office colleagues?

CONCLUSION

Pivoting quickly to a remote model during an emergency is one thing but building a deliberate remote work strategy that will function effectively over the long term is another. Significant reflection and planning are needed as executives consider what the workplace of the future might look like. In this brief we presented an overview of the benefits and potential downsides of remote work. We also outlined seven interdependent factors: Fit, Tasks, Communication, Relations, Organizational Culture, Tools, and Support that must be intentionally addressed to effectively sustain successful remote work. In this brief each factor is followed by a series of key questions that we recommend organizations consider to determine their readiness for some degree of remote work and establish the new policies and processes needed to replace those which took physical proximity for granted.

The pandemic has created an opportunity to re-think existing organizational practices, including models of work. One tech executive said, *"I see us eventually going back to some sort of office, but in terms of how many times people have to be there a week, you know, as long as people are getting work done…I don't really care."* A not-for-profit employee said, *"Now one thing my bosses talked about, you know if there's like a Friday we want to work from home or something like that. She said she's a lot more open to that than she would have been before, because now we know it's possible."* And a small business owner shared, *"I am coming to terms with it. There are elements of it that I like, and there are elements of it that I don't like, but I do think it's important. I think it's not going away."* For most organizations, the decision to go remote is unlikely to be an all-or-nothing issue, and it is expected that many will incorporate remote work options going forward. Our research found that remote work isn't for every person, task, or organization but when the fit is right, and deliberate processes for collaboration and relationship-building are in place, it can improve the quality of life for workers while also maintaining a healthy and productive work culture for organizations.

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