

**BIG**TIME

# Professional Services Guide to Remote Firm Management

Best practices for leading a remote workforce including managing internal operations and staff, keeping company culture alive, and setting standards.



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## ► INTRODUCTION

Work is more than just your office space. It's your firm's goals, your accomplishments, your projects, and your teamwork. As the wave of remote work continues to trend upwards, firms must adjust their management style to keep all the pieces that make their business successful moving forward—in or out of the office.

The good news is that with the right tools in place, it is now easier than ever to make this happen, and to make it happen efficiently. In fact, companies that have implemented flexible work structures, see tremendous benefits in employees' work-life balance, job satisfaction and productivity.

In this guide, we'll share best practices and experiences on how to manage your firm and staff that can be applied to an all remote staff or a hybrid of in-office and remote employees.



Over the last 10 years, **remote work has grown in popularity by 91%.**

[Source]



**75% of remote workers** have seen an improvement in work-life balance.

[Source]

## ▶ ESTABLISH REMOTE WORK STANDARDS

Your staff is still your staff, whether they are in the office or working from home. Establishing your firm's acceptable behavior for remote work will help you guide your staff into habits that make them more productive.

If your work-from-home policy feels ad-hoc, it's good to go back and provide more structure and guidance for employees. Clearly-defined flexibility is the goal.

### FACTORS TO ADDRESS WHEN DEFINING YOUR WFH POLICY:

#### At-home office setups

Everyone has different work styles, and while some may be able to carry on with their laptop at the kitchen table, others are more dependent on having a full work station. Make it known to employees what options and resources they have for closely replicating their usual desk space.

#### Schedule expectations

A big perk of working from home is it allows for more flexibility in one's schedule, and removes the guilt of needing personal time during work hours for doctors appointments, child care or necessary errands. This will look and work differently for every business, so be transparent about the expectations for work hours and flex time.

#### Address PTO, paid leave and sick days

Now is a good time to remind employees of the PTO, paid leave and sick day options available should they need to take advantage of them. Working from home should not be a deterrent from taking appropriate sick days.

#### Casual appropriate attire

Being at home all day lends itself to being more comfortable than what many are used to wearing in the office. If needed, address what's appropriate for internal video calls and if client-facing expectations differ.



**57% of employers with flexible remote work policies say it's reduced employee churn and boosted morale.**

[Source]

## ► STRATEGIES FOR EFFECTIVE REMOTE MANAGEMENT

Managing teams and your firm's operations simply looks different when out of office.

A common misconception of many remote doubters is that working out of the office is less productive and the work will suffer. However, productivity has less to do with the environment you're in and more about setting the proper operational processes and communication expectations.

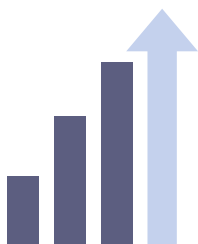
### FOLLOW THESE BEST PRACTICES TO KEEP YOUR TEAMS CONNECTED AND OPERATING SUCCESSFULLY WHILE REMOTE:

#### Individualized management

This management style is popular for many even in the office, but it's critical for managing remote employees. Everyone is in their own space and with that comes individual needs and responses to work. Set aside time to listen to each team member's needs and how they might have changed while being remote, and collaborate on creating a plan that keeps them on track and accountable for their contributions to the team's success.

#### Deadline-driven collaboration

This tip should come easy to professional services firms. Deadlines and structured goals make it harder to be a slacker, in or out of the office. Set clear individual and team goals and schedule regular status check-ins to keep everyone motivated. **Gantt charts** are a powerful tool for aligning project tasks and milestones to help teams stay on the same page. When built using cloud-based software, everyone can view project progress in real-time and stay accountable for their task dependencies.



**85% of businesses greater work flexibility has resulted in an increase of productivity.**

[Source]

## **Cloud-based time and expense tracking**

Nothing is more restricting to productivity than desktop-based applications that tie you to one computer and can't be freely shared and accessible for others. Cloud-based [Professional Services Automation software](#) eliminates the need for tedious manual tracking of time and expense in Excel sheets. Instead have the information vital to your firm's operations hosted in the cloud, to access at any time from any location. This will cause a chain reaction for quicker approvals and invoice creation.

## **Regular and systematic reviews**

Cadence is key to providing structure for remote work. Instead of random or daily ad-hoc check-ins with the team, set up a workflow with regular and systematic reviews. This will take pressure off the managers, and ensure every member of their team is doing their part to keep the firm on track. Slip ups will be caught before there's a problem, and managers can have peace of mind knowing the proper chain of communication is in place.

## **Track utilization in real-time**

Giving clear direction on the hours and tasks expected of each employee will help eliminate unnecessary overtime or lack of performance. Even from afar you can ensure everyone is doing their part in moving projects forward, and to keep a pulse on how the team is performing as whole, by leveraging [real-time reports on utilization](#). Doing so will also give insight into how to bill your clients and how to properly allocate resources.

## **Streamlined invoicing**

Cash flow is always essential to operations, and how quickly you're able to get an invoice out makes a big impact

in how fast you get paid. [PSA software](#) allows you to create invoice templates and then automate the calculation of hours, billing rates and expenses in a few clicks. From there you can send for review, and have managers make any needed corrections without being dependent on print out copies or numerous email attachments.

## **Accept online payments**

Physical payments through check cause many delays, and when working remote it only gets slowed down further. Checks still being mailed to the office means someone has to be there frequently to receive them, and without a remote scanner they'll also have to make a trip to the bank for deposit. Online payments via ACH or credit card eliminate these steps and expedite the process. Giving clients the option to pay through an electronic method will eliminate many hurdles for both you and your clients, speeding up the process.

## ▶ KEEPING MORAL HIGH MEANS PROMOTING CULTURE, NOT JUST WORK

Culture is a part of any office environment—and you work hard to promote your firm’s unique culture. It will be part of how you recruit and retain talent, whether that talent resides in the office or works remotely.

For remote workers, culture boils down to the little things you do to allow staff to socialize and share ideas. Below are a few things we’ve had success with, things that have helped us stay connected as a company. Hopefully there’s an idea below that you can steal!

### PROGRAMS WE’VE IMPLEMENTED TO CONTINUE OUR COMPANY CULTURE OUTSIDE OF THE OFFICE:

#### Daily video coffee talks

Every morning each department joins a video call with their team to say hi and enjoy their morning cup of coffee like we would getting settled into a workday at the office. Love it or hate it, this also helps you get out of bed and get put together for the day. No one needs to know if you’re still wearing sweatpants, but at the very least, this gets you on track for productivity and feeling better about your day.

*“I’ve worked remote since starting with BigTime, and the addition of daily standups although small have made a big impact on how connected I feel to my team.”*

**Mackenzie | Marketing**



### Google Hangout water cooler chat

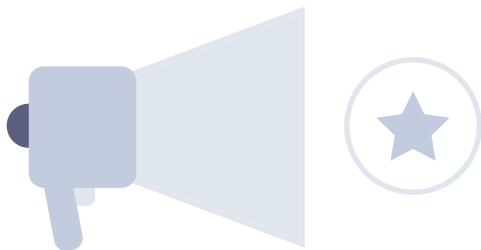
As you know, things can get twitchy when you're stuck inside all day, and you may need a break or a new face to talk to. We organized an all day Google Hangout for people to come and go when they need a break from work and want to socialize. Many people join at lunch as a nice way to have a meal with someone, albeit virtual—it beats TV.

### All company Friday lunches

Transparency is especially important across departments and with leadership. We make sure to dedicate time to this by hosting an all-company lunch. The topic and presenters vary week to week, but every Friday employees are able to order a company-provided lunch and eat together on a conference call.

*“While working remote it’s easy to work more independently, so it’s great to have these Friday lunches that connect us all back to other departments and our goals as a company.”*

**Laura | Finance**



### BigTime Fun printable activities

For many, trying to get work done with kids at home can get a little crazy. We put together weekly printable activity books, including a coloring book and scavenger hunt, to give little ones some “work” to help parents catch up on emails or just enjoy their coffee while it’s still hot. It’s been fun to see everyone’s kids art work, and quite a few of us have even downloaded the pages ourselves to enjoy some fun breaks. [Download your own copies here.](#)

### Giving kudos and small incentives

Initially the Sales team started giving away small weekly prizes (Amazon gift cards, picking a theme for the daily team call, etc.) to the top performing Account Executive that week. After seeing how a dose of health competition sparked enthusiasm, we extended the idea to the whole company and set up a Kudos Slack channel for employees to give a shout out when someone goes above and beyond to help a teammate or client. Everyone submitted then gets to spin the virtual wheel for a prize that week.

*“The Kudos channel is a great way to spark positive feedback among peers, not just leadership. I love seeing my team involved, but even more so when it’s to nominate someone from another department.”*

**Michael | Sales**



### **Kids and pet social hour**

Adorable kids and cute pets are a no brainer for morale boost. Just when it's reaching the 3 PM slump, a couple times a month we'll have a kids and pets social video call for people to stop in with their families and hang out. Something that wouldn't be possible in the office, it's a nice plus getting to know our coworkers better and meet the important friends and pets in their lives.

### **Wellness slack channel**

Our office loves slack as we typically have a mix of full-time remote workers and in office employees, but recently we've really stepped it up a notch adding new channels to build remote communities. One of the best ones so far is our wellness channel where people are sharing mindfulness tips, at home workouts and new recipes to try.

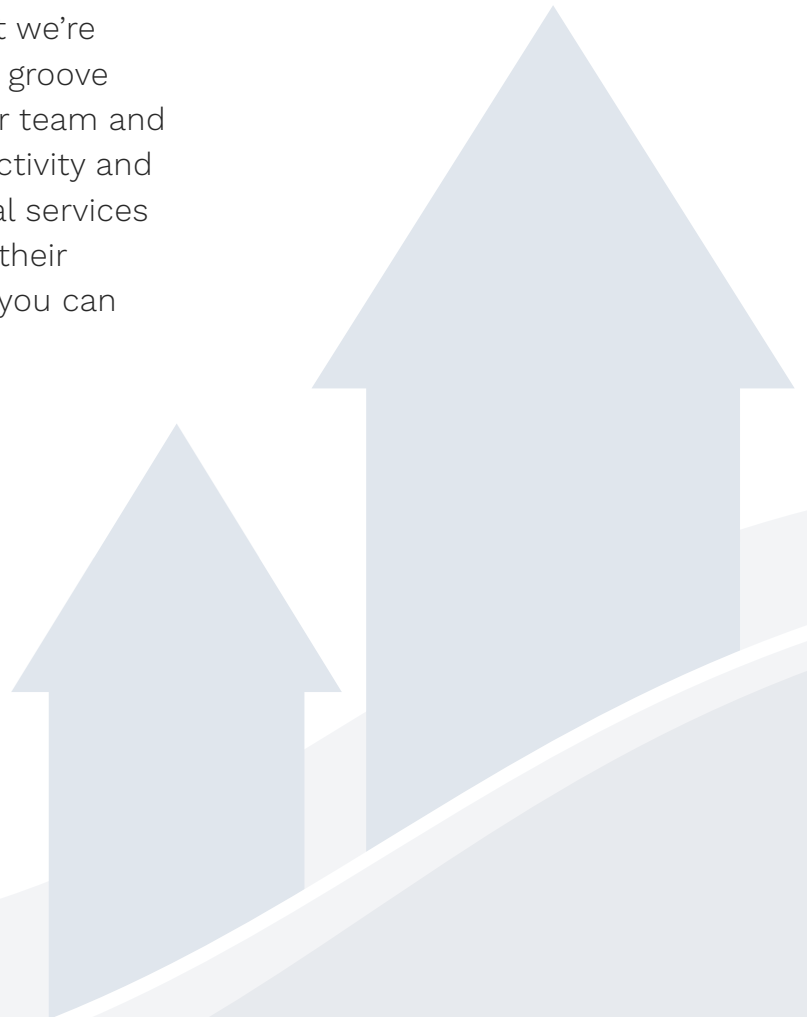
*“Starting channels with designated topics I believe help make people more comfortable in sharing and reaching out to each other socially. It can be more intimidating when your main interactions are online and not just passing each other’s desks casually.”*

**Ben | Customer Success**

## ► CLOSING SUMMARY

**We hope this guide provided you with helpful strategies and a new outlook to take on as you establish your firm's remote policy.**

Some areas may be trial and error, but we're confident that once your firm finds its groove with remote work it will empower your team and result in a positive outcome for productivity and growth. Our goal is to help professional services firms like yours to be able to manage their business as efficiently as possible, so you can focus on the work that matters most.

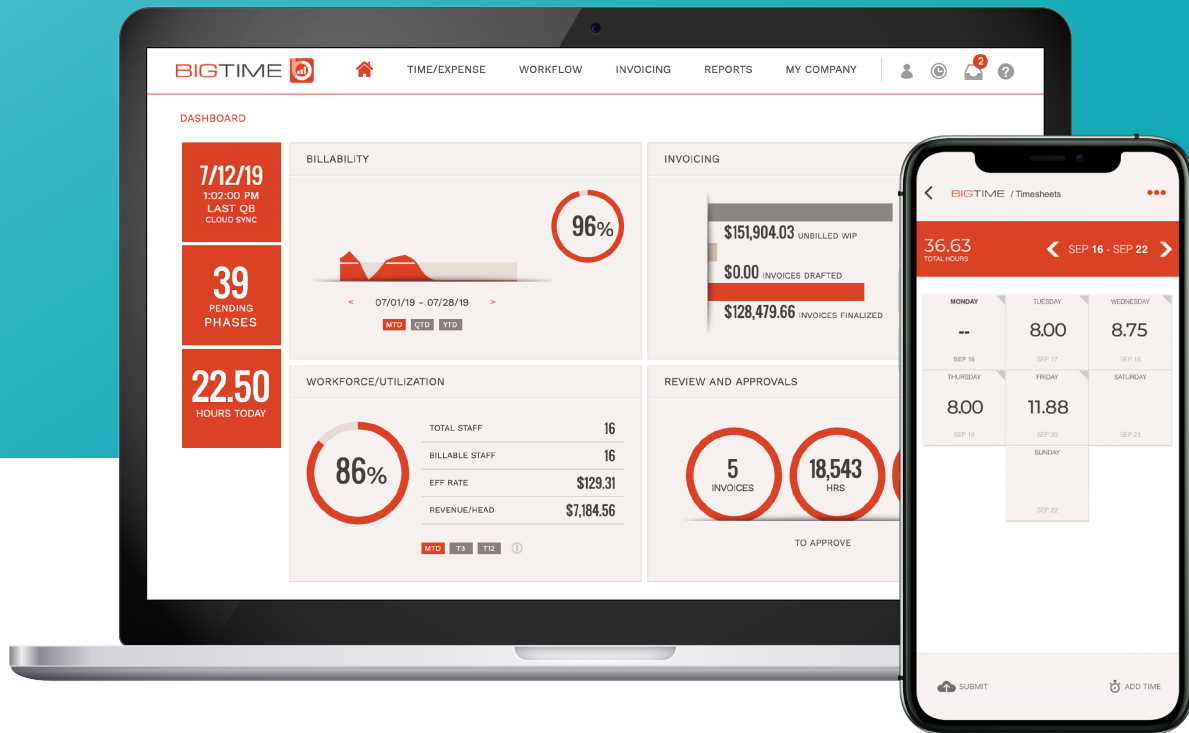


# ABOUT BIGTIME

BigTime takes the guesswork out of utilization, capacity planning, and project profitability. Our award-winning PSA software provides project planning, budgeting, time- and expense-tracking, and invoicing, all backed by uber-cool reporting and analytics.

We help accountants, architects, engineers, IT-services firms, and scientific and management consultants budget, track, and bill their most important asset: time.

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1-866-BIGTIME

311 South Wacker Drive, Suite 2300 Chicago, IL 60606

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