

# WORK-FROM-HOME CONTINGENCY PLANNER

Prepare Your Team to Work from Home  
without Missing a Beat, in the Event of a Pandemic,  
Natural Disaster, or Other Unforeseen Event



*Trust Changers*

[TrustChangers.com](https://TrustChangers.com)

# HOW *this guide* WORKS

*This is a 2-part process.*

First, if you haven't already done so, you'll spend a little time getting your team on board.

If anyone outright objects to the idea of creating a contingency plan, remind them that **the bottom line is this—for people who spend the majority of their time on a computer, in a cubicle or office, without any in-person customer contact, working from home changes very little, other than your location.**

**Either the work gets done or it doesn't.** Projects will still be managed with a supervisor's help, as they always have been. And a supervisor will still hear from clients or colleagues if anyone is missing deadlines.

Denying that there is a need to prepare or practice in advance is serving no one. In the event of an emergency, you won't have a choice. This is an opportunity to get ahead of the unknowns.

Second, once everyone agrees that building a contingency plan is a good idea, you'll work through a 5-step checklist to prepare everyone to work from home without missing a beat, in the event of a pandemic, natural disaster, or other unforeseen event.

Trust Changers CEO,

*Shaley Paige*

Published by Trust Changers, LLC

[TRUSTCHANGERS.COM](https://TRUSTCHANGERS.COM)

*Always speak with your supervisor or human resources department to find out if disaster recovery plans and policies are already in place for you to follow.*



## PART 1

# Get Your Team on Board

If your team hasn't worked from home in the past, this is new territory. Have the following conversations to align expectations:

1. What are the beliefs people have about working from home?
2. What is most important to everyone?
3. How will the team evaluate what is and is not working?

Change makes people anxious, so set yourself up for success by always reviewing the following ground rules prior to each discussion:

- Be inclusive and empathetic. Ask other people about their experiences, worries, and interests with regard to working from home.
- Be open to alternatives. Learn to value suggestions, even when you think you've already got things figured out.
- Be patient and respectful. Build in time for explorative, hypothetical conversations to keep others (and yourself) from feeling rushed or pressured.

Make sure to ask your team if there are any other ground rules they'd like added to the list prior to starting discussions.



## PART 2

# Prepare Your Team to Work from Home

Don't wait for disaster to strike. As a proactive measure, work as a team to complete the following checklist:

1. Decide what online tools your team will use to stay in contact and collaborate: *Software/Application Inventory*
2. Agree on how to stay in contact if systems are unavailable
3. Gather required equipment to work from home longer than 2-3 days: *Home-Office Inventory AND Hardware Inventory*
4. Schedule regular work-from-home days to make sure everyone is prepared
5. Practice video collaboration tools during low-stakes activities

**PART 2**

# DECIDE WHAT ONLINE TOOLS YOUR TEAM WILL USE TO STAY IN CONTACT AND COLLABORATE

Can you see my screen?



Yep, I can see  
everything you're doing.



**THE TABLE  
IS AN EXAMPLE  
(with excellent tips!)**

Create your own Software/Application Inventory in your preferred software for tables (Word, Excel, or Google Docs, etc.) to fill in your personal details.

*software/application inventory*



What We Need	What We'll Use	How We'll Use It
Instant Messaging (IM)	<i>Slack.com</i>	Post your status (available, in a meeting, busy, etc.), so people know when you're around to answer a question or have a quick discussion
Video Meetings	<i>Zoom.us</i>	Share your screen to look at work together, make notes, and agree on solutions. With permission from all attendees, RECORD meetings to reduce note taking and allow everyone to focus on the discussion at hand.



## PART 2

*software/application inventory* (example continued)

What We Need	What We'll Use	How We'll Use It
Video Calls	<i>Slack</i>	Always IM coworkers before starting a video call to inquire if it's a good time to talk (See <b>Video-Call Tip</b> , on the next page)
Whiteboard Ideation	<i>Lucidchart.com</i>	In place of a whiteboard, for team brainstorms, use Lucidchart for super-easy drag-and-drop virtual sticky notes and flow charts that can be simultaneously edited by multiple users.
Virtual Private Network (VPN)  Your organization may not have a VPN. Definitely inquire to find out.	<i>Get tech support to help set this up</i>	When working from home, turn on VPN before connecting to office systems and files. VPN sends and receives your company's data through a private channel that is shielded from the rest of the Internet.
Virtual Desktop Software*  Your organization may not have virtual desktop software. Inquire to find out.	<i>Find out if we have this option</i>	Virtual desktop gives you backup access to work software and files, even if you don't have a laptop at home. It lets you access a fully functioning computer interface from any device (phone, tablet, your personal laptop, etc.).
File Sharing and Storage	<i>Keep using OneDrive</i>	If your team uses a private network space, you will need VPN (described above) to access it from off site—get VPN set up in advance. Consider using a cloud service (Microsoft OneDrive, Google Drive, etc.) to access files from any device, anywhere.

*List additional requirements...*

## PART 2

**Video-Call Tip:** So what's the difference between a *video call* and a *video meeting*?

- **Video calls** can be started through instant messaging (chat) applications, like Slack, WhatsApp, and Microsoft Teams. Video calls can ring your teammates without warning.
- **Video meetings** are usually scheduled and everyone shows up at an agreed-upon time to a "meeting space." Video meetings take place with apps like [zoom.us](https://zoom.us).

Your team will feel much less anxious if you all agree that unexpected video calls are discouraged. When people work from home, they relax. Attempting to call someone via video without confirming that they are ready to be seen is like walking into a closed-door office without knocking. Among other things, unexpected video calls can interrupt:

- Important discussions (on the actual phone or via another video app)
- Someone's lunch (they may be eating at their desk and have a mouthful of food)
- Someone deep in thought (focusing on solving a problem)

The person you are calling may also want to tidy up their house (office) a little, adjust lighting, or go to the restroom before starting a video conversation.

Video chat is really important if you work from different locations, but as a best practice, ask everyone to send a text IM to see if it's a good time to video, before starting any video call.

\* This is referring to virtual desktop functionality, not the Virtual Desktop brand

## PART 2

# AGREE ON HOW YOU ALL WILL STAY IN CONTACT IF SYSTEMS ARE UNAVAILABLE

The simplest way to stay in contact if IM (for example) is not available is to exchange phone numbers with your team.

That said, not all teams share personal contact information, and it's completely okay to choose another option for secondary contact. Just make sure that you have this conversation and document your agreement for everyone to acknowledge.

### Backup Contact Plan

In the event that our team is prevented from coming into work, due to some unforeseen disaster or event, we will first connect via

instant message on Slack

and if that system is down, then we will connect

this way instead text via phone.

### THIS BACKUP CONTACT PLAN IS JUST AN EXAMPLE

Create your own Backup Contact Plan in your preferred software for (Word, Google Docs, etc.) to fill in your personal details.






## PART 2

# GATHER REQUIRED EQUIPMENT TO WORK FROM HOME LONGER THAN 2-3 DAYS

Identify what you already have and what you are going to need in your home office. At a bare minimum, all you need to work from home is a quiet distraction-free place to set up your laptop. However, if circumstances require you to work from home for longer than 2 to 3 days, a minimalist philosophy will get old really fast.

"This is going to get old fast."



Don't rush out and buy anything. Work with your employer to see what you are responsible for and what they will provide, in the event that a disaster recovery situation requires you to work from home.

**We've provided an example on the next page.** Create your own Home-Office Inventory in your preferred software for tables (Word, Excel, or Google Docs, etc.) to fill in your personal details—don't forget to make copies for your team!

## PART 2

*Home-Office Inventory*







	Employee Responsibility	Employer Responsibility
Quiet Space (See <b>Door Tip</b> , below this table)	✓	
Good Lighting	✓	
Desk	✓	
Supportive Chair		✓ <i>Boss agreed to \$350 budget, if I need a better chair at home.</i>

*List additional requirements...*

**Door Tip:** Having a door that physically separates your home office from the rest of the house isn't absolutely necessary, but it helps on many levels—professionally, ethically, and emotionally. It acts as a line between your work and home life. When you're at work, be present for your coworkers and clients. And once you close that door at the end of the day be there for your family and friends. Everyone will thank you for it!

## PART 2

### Hardware Inventory

	Employee Responsibility	Employer Responsibility
Computer		 <i>My work laptop. Take home with me daily just in case.</i>
Printer		
Phone		
Mouse		 <i>Keep in laptop case. Use personal mouse as backup.</i>
Keyboard	 <i>Use personal.</i>	
Monitor	 <i>Hook up to personal.</i>	
Headset		
Cables (spare laptop charger, HDMI, etc.)		
External Storage (USB, etc.)		

#### AS USUAL, THIS IS AN EXAMPLE

Create your own Hardware Inventory in your preferred software for tables (Word, Excel, or Google Docs, etc.) to fill in your personal details.

*Don't forget to list additional requirements!*



## PART 2

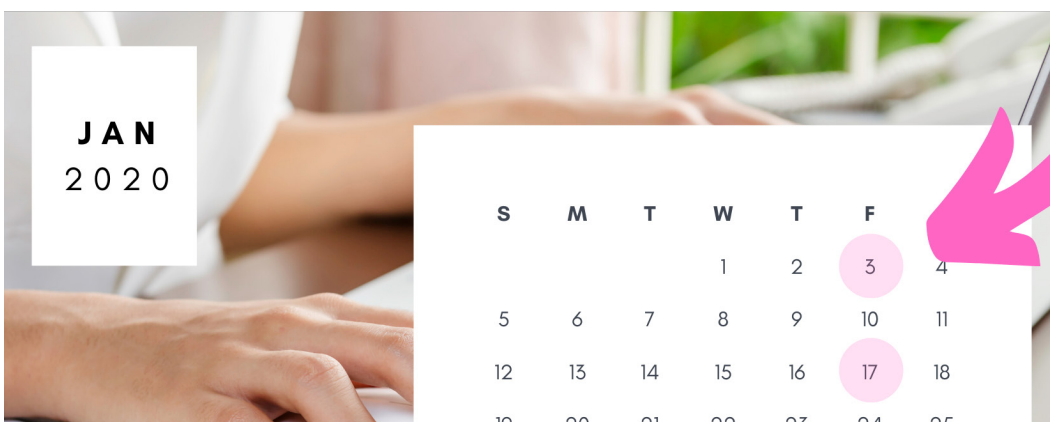
# SCHEDULE REGULAR WORK-FROM-HOME DAYS TO MAKE SURE EVERYONE IS PREPARED

Start building your comfort level before a disaster hits, so that you can feel confident that work will continue with minimal interruptions. Agree with your team on days in the month when you can practice working from home. One day per week will get you up to speed faster, but even once per month is better than nothing.

Keep this as a standard practice into the foreseeable future to ensure your team doesn't lose its capabilities and is always prepared. During work-from-home days, the focus should be on:

- Checking in via the agreed-upon system (make sure people know what to do if your first choice is unavailable)
- Making sure you have access to all required software and hardware to work as productively as you would have in the office

*We'll work from home every other Friday to practice and prepare!*



## PART 2

# PRACTICE VIDEO-COLLABORATION TOOLS DURING LOW-STAKES ACTIVITIES

Connecting with your team using video is the next best thing to in-person communication. It allows you to pick up on body language and tone of voice, as well as ask clarifying questions in the moment.

Don't wait until you are working from home to hone your video collaboration skills. Enlist your coworkers to practice using video tools, even when everyone is together in the office. It's far better to face technical issues and to troubleshoot when the stakes are lower. This will increase your confidence and ability to recover when something goes wrong and you're online at home.

It's super easy to get frustrated and spend a lot of time venting about how technology isn't perfect, but under no circumstances should you blame each other. Adopt the team

I'm nervous about being on video.



OMG, me too! Let's practice using the video software together.



mindset that there are NO dumb people, only dumb technologies (meaning that if they were designed better, they wouldn't drive you so crazy). ;)

- Be forgiving and patient when someone struggles to figure something out.
- Don't hesitate to try workarounds when technology is making things harder than they have to be.

## PART 2

Great apps improve productivity and help your team succeed, regardless of where individual members are located. [Zoom](#) is our preferred video collaboration tool, but all good tools should do the following things (which you are encouraged to practice):

- Being the host versus being a meeting attendee
- Setting up, sending invitations, starting, and stopping meetings
- Locking meetings to prevent new attendees from joining after a meeting starts
- Connecting and muting your own audio and video
- Helping others connect their audio/video (See **Audio Tip** on the next page)
- Setting up your video, so that people can see you well
- Sharing your screen for others to see while you edit work with their help/feedback
- Recording meetings to your desktop or the cloud (only with permission from all attendees)
- Sharing mouse control
- Using chat within the video app
- Uploading files to chat to quickly share something with your team during a meeting

There are LOTS of other things you could learn, but you only really need to be good at a few things to have really great meetings. One of our values in all Trust Changers trainings is that 5% of the skills can get you 95% of the way... you just need to know which skills to focus on. The list above is a great start!



## PART 2

**Audio Tip:** Your most frequent struggle will probably be related to audio... We've found that having alternative plans, like "if you can't get audio to work, call me on my home number," or holding up signs as shown below can help people know what to do.



Issues should be minimal. When all else fails, restart your app, find a workaround, or try a different app. Whatever you do, don't let challenges get in the way of your success.

## That's It!

We hope this guide helps you prepare to work from home without interruption, in the event of a pandemic, natural disaster, or other unforeseen event. Please let us know how it's going, and send questions to: [team@trustchangers.com](mailto:team@trustchangers.com)



*Hi, I'm Shaley*

FIND ME ON SOCIAL



@TrustChangers



@TrustChangers



@ShaleyPaige

Trust Changers was inspired in 2010, when after 5 years of exemplary service at Cornell University, in Ithaca New York, I negotiated a contract to work from home—in Honolulu, Hawaii.

In order to feel confident working 100% online, I made it my mission to develop processes, skills, and behaviors that ensured my colleagues always would trust I could seamlessly work with them, regardless of whether I was in the same office or on a tiny island—6,000 miles away.

Now, I am on a mission to share those skills and help people use Internet technologies to improve their lives at work and at home.

DON'T WAIT FOR A TECHNOLOGY THAT MAKES YOUR TEAM GREAT

**BUILD A GREAT TEAM THAT CAN ADAPT  
TO ANY TECHNOLOGY**

*Sign up for the*

ELITE VIRTUAL-TEAM BOOTCAMP AT

[TRUSTCHANGERS.COM/BOOT-CAMP](https://TRUSTCHANGERS.COM/BOOT-CAMP)



[Some of the links mentioned are affiliate links, which means that if you choose to make a purchase, I will earn a commission. This commission comes at no additional cost to you.]

Copyright © 2019 Trust Changers

All rights reserved. Except as permitted under the United States Copyright Act of 1976, no part of this guide may be reproduced or utilized in any form or by any means, electronic or mechanical, including photocopying, recording, or by information storage and retrieval system without permission in writing from the publisher, except in the case of brief quotations embodied in critical articles and reviews.

All trademarks are trademarks of their respective owners. Rather than put a trademark symbol after every occurrence of a trademarked name, we use names in an editorial fashion only, and to the benefit of the trademark owner, with no intention of infringement of the trademark. Where such designations appear in this guide, they have been cited or called out stylistically.

Limit of Liability/Disclaimer of Warranty: While the publisher and authors have used their best efforts in preparing this guide, they make no representations or warranties with respect to the accuracy or completeness of the contents of this guide and specifically disclaim any implied warranties of merchantability or fitness for a particular purpose. No warranty may be created or extended by sales representatives or written sales materials. The advice and strategies contained herein may not be suitable for your situation. You should consult with a professional where appropriate. Neither the publisher nor author shall be liable for any loss of profit or any other personal or commercial damages, including but not limited to special, incidental, consequential, or other damages.

Guide design, guide cover, and illustrations by Trust Changers

Images courtesy of: -izabell- iStock, Askold Romanov iStock, cole matt iStock, Digital Vision Photodisc, Giraphics iStock, Ingram Publishing Thinkstock, IPGGutenbergUKLtd iStock, istrejman iStock, janrysavvy iStock, Mike Watson Images moodboard, Owat Tasai iStock, Ron Chapple Stock Ron Chapple Studios, sserg\_dibrova iStock, Wavebreakmedia Ltd iStock, Wavebreakmedia Ltd Wavebreak Media, XiXinXing iStock, Yevgen\_Lyashko iStock