



## Wealth Planning Report

# Best Practices for Successful Work from Home

The number of at-home workers has skyrocketed this year as the novel coronavirus caused companies across the country to be locked down and forced to have their employees work from home whenever possible.

As a result, some business experts are suggesting that remote working—already a well-established trend—will become an increasingly common way for many companies and their employees to get the job done. If so, you may find yourself working remotely more and more—either by choice or by necessity. And if you manage employees, you need to oversee and motivate your teams from a distance.

With that in mind, here are some best practices both for working and managing people from your home.

### Your equipment

Part of successfully telecommuting is getting set up smartly to conduct business smoothly while maintaining an officelike atmosphere.

At the bare minimum, you'll likely need a good computer, monitor and headset—along with cybersecurity software and a storage backup solution. Upgrade to the strongest possible Internet connection, too, so your e-meetings don't freeze up during peak usage times.

Depending on how professional you must appear on camera, consider investing in a high-quality microphone and good lighting—little details like your personal appearance can help you be perceived as more credible and improve the clarity of your voice for better communication.

In addition, there are video and collaboration tools people have become quite familiar with recently, including Webex, Google Hangouts, Microsoft 365, Slack and Zoom. There also are messaging and “walkie talkie” apps, such as Voxer, that let you quickly send live voice messages to others—which helps you convey your tone and expression better than you might be able to via an email message.

### Your space

Next, you need to set up in the right environment—which means a dedicated work space. That could mean a separate room with a door (ideally), part of your living room or even your kitchen counter as a last resort. The key is to define one space that sends the message to you (and your family, if they're around during nine to five) that “this is where the work happens.” A clearly delineated space will help you focus when you need to—and then be able to step away from work at the end of the day.

Pro tip: Don't set up shop in your bedroom or on your couch if you can help it. Leave those spaces as designated nonwork/relaxation areas—you'll need them to unwind!

Regardless of the space you select, set up shop ergonomically to avoid muscle strains that could lead to chronic health problems. An adjustable chair, an ergonomic keyboard and a headset are basic must-haves for most at-home workers. Adjustable desks that allow you to work while both standing and sitting throughout the day can keep muscles happy and joints flexible.

### ALL-IMPORTANT WORK HABITS

That said, a fancy chair in a nice room won't matter much unless you also establish and follow smart work-at-home habits.

**1. Set firm boundaries.** Make it clear that when the door to your home office is closed, you are closed for family and personal business. If you find yourself working in an exposed space or if you have children at home while you're working, wear noise-canceling headphones to communicate that you're not to be disturbed and so that disturbances around you and the home don't disturb your call.

Set boundaries for yourself, too. Some at-home workers find chore breaks to be relaxing, while others too easily get distracted if they don't stay laser-focused on work. Your temperament should drive your decisions here especially the space you will work in.

**2. Establish a routine, and stick to it.** This will likely require trial and error as you figure out what types of scheduling and work routine are best for you, your boss or clients, and your co-workers. To the extent possible, tackle the toughest job

tasks when you are at your most productive. And try to start and end your workdays at the same time to mentally separate your professional and personal times. (You might want to take a morning walk or run as your new “commute” to help shift your brain into work mode.)

Pro tip: Schedule regular formal breaks for movement and mental health. Eat lunch away from the desk, walk the dog or just simply go stretch in a different room for five minutes.

**3. Be able to “show your work.”** Bosses often fret that at-home workers won’t stay focused or driven. So consider easing any doubts by creating a viewable online task list or tracker that shows the current status of your projects. (If your company uses tracking software, note that this decision might be made for you.)

**4. Revisit your remote communication skills.** Ideally, your boss or team leader has spelled out communication protocols. But if that’s not happening, take the reins:

- Develop clear expectations for daily communication with the team—whether it’s a short kickoff call in the morning or a wrap-up call later on. Do this jointly in partnership with your co-workers.

- Conduct video meetings that make conversations richer. Seeing co-workers’ faces can bring back some of the office’s personal “watercooler conversation” dynamic to at-home working.

- Check your tone and style, too. Body language doesn’t come through with emails and instant messages. Take a minute to reread written communications before you send them to ensure you are not inadvertently sending an unintended message. Think about sending important messages the next day after first rereading.

**5. Stay connected beyond business.** The in-person bonding that occurs in an office isn’t just a nicety—it also helps build strong teams and spark creative problem-solving that doesn’t always happen in formal meetings. Video-based happy hours, pizza parties or birthday celebrations where everyone can dial in can keep the team feeling connected and that they’re “all in it together”—even if everyone is miles apart.

## Conclusion

It remains to be seen whether the pandemic shut down and restrictions will permanently shift our working patterns. But it’s certainly possible that remote working will become an increasing part of the “new normal” in the years ahead. If so, you can take steps now and move beyond ad hoc arrangements that will set you and your team up for success no matter where the work gets done.

This is an executive summary of our wealth management ebook. For a complimentary copy of our complete report, please contact us.



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Paul founded Professional Financial Strategies, Inc. as one of the first fiduciary advisory firms in 1993 that now specializes in retirement and wealth planning for affluent and aspiring families. Paul is a personal chief financial officer who acts in the best interest of clients. He brings together a distinctive management process and a network of specialists for making informed decisions for scientifically-structured investing, secure income, mitigating taxes, protecting assets, and preserving wealth for family and causes that make an enduring impact.

Mr. Hill received a BA with distinction from the University of Rochester and later an MBA in finance from its Simon School of Business. He earned an MS in financial services from The American College along with his Chartered Financial Consultant and Retirement Income Certified Professional designations, and then received an MS in financial planning from the College for Financial Planning (now at the University of Phoenix). The College for Financial Planning appointed him as adjunct faculty, and he has taught at St. John Fisher College. Who’s Who presented Paul with the Albert Nelson Marquis Lifetime Achievement Award in 2018 and featured him with other recipients in *The Wall Street Journal*.

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