

WELCOME TO  
BETA-I MANUAL:

# HOW TO GO FULLY REMOTE



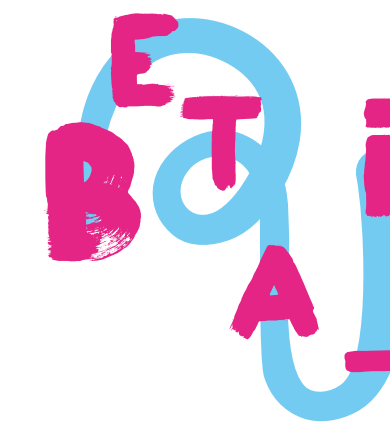
BUILDING  
THE INNOVATION  
ECOSYSTEM



This document was initially created for Beta-i internal use, to provide guidelines and rules for remote work for all Beta-iers and to keep the work smooth and effective.

But let's face the truth - remote work as a company is not easy, regardless of the size of a team. That's why we decided to share this framework and our experiences with the community, as many of you can benefit from it.

Hope you'll find here concepts that will save your time and will allow your team to quickly adjust to those special circumstances.



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## 1) INTRODUCTION TO REMOTE WORK

Going fully remote brings some challenges and requires a lot of adaptation from our side. But it will also be an interesting experience.

This document and these remote policies/guidelines will be updated as we learn from this experience.

## 2) OFFICE MATERIALS

You are free to take your office material (laptops, desktops, monitors, etc.) home with you. The office is still open and can be accessed with your card.

Please note: you should deactivate any automatic “out of office” or “working remotely” replies.

## 3) REMOTE WORKING TEAM AGREEMENT

### WORKING HOURS

Our general working schedule is from 9.30am to 6.00pm. Of course there’s flexibility to manage your working schedule,

especially now that you are at home and dealing with other real-life necessities. You should be present at team and company meetings. We advise each team to commit to some time together every day - your team should select one or two hours when everyone commits to being online at the same time.

### AVAILABILITY

It’s important you signal your availability - you can customize your status in Slack and Asana, please use it. You should change your status every time your availability changes - please check our suggested status (in a meeting, having lunch, sick, etc.). You can also customize your own, just make sure it’s easily understandable.

### RESPONSE TIMES

We expect chat replies within an hour for people with their status set to “available” and email replies within a day. If we need someone right now, we call.

## 4) ROUTINES

There are some routines we want to establish across the company:

### 4.1) DAILY CHECK-INS AND CHECK-OUTS

Run your check-in or check-out as a 10-minute virtual meeting or via group chat.

***Check-ins should be around 9.30am***

Check-In example questions:

- *Yesterday I...*
- *Today I...*
- *I feel...*
- *I need help with...*

***Check-outs should happen around 6.00pm***

Daily Check-Out example ideas:

***Share one thing you “check-out” with: it could be a feeling, a reflection, the most important thing you take with you, what stands out the most, etc.***

### 4.2) WEEKLY ACTION REVIEWS

We’re adapting to a new situation and there’s a need to learn quickly, and adjust our strategies. Your team can use the action review to quickly innovate your approach to remote work. In these meetings, ask everyone:

- ***What happened this week?***
- ***What worked well that we should keep doing?***
- ***What needs to be changed?***
- ***What one or two specific changes should we try next?***

Please document these meetings and share it with Talent so we can propagate learnings across the team.

## 5) OFFICE TOOLS

The baseline of remote work is communication, so we will be very strict regarding the usage of the selected tools:

### 5.1) ZOOM, GOOGLE HANGOUTS, SLACK - COMMUNICATE IN REAL TIME

#### *Why is it important?*

It drives engagement, efficiency and human connection.

#### *How do we do it?*

We will use Zoom for big meetings (ex: company-wide meetings such as Happy Monday or All Hands) or webinars and Google Hangouts for scheduled team meetings. Also, you can quickly move any messaging in Slack to a face to face conversation by using Slack's built-in voice and video calling feature.

#### *Important tips:*

- *Always have camera on*
- *Use body language to communicate*
- *Share screen*

### 5.2) SLACK, GMAIL - COMMUNICATE ASYNCHRONOUSLY

#### *Why is it important?*

You have access to one person or your entire team no matter their time zone, helping to build a virtual team community when you're not in the office together.

#### *How do we do it?*

We will use Slack as our main communication tool, since it keeps our email inboxes from overflowing, while maintaining threaded conversations in topic- and project-specific channels. We've already purchased the paid version so we can keep our data stored. We will also use a little bit of Gmail for important communications.

## 5.2.1) HOW WILL WE USE SLACK?

Using Slack as our main communication tool will require some effort and discipline from all of us. These guidelines are still a work in progress, but this is what you should know about Slack:

### A) *Company-wide communication*

These are our open channels and their descriptions. Please use them according to their purpose:

**#announcements:** one-way communication channel to post important team-wide information/announcements

**#teamchat:** general team chat, to share relevant information, discuss ideas and celebrate achievements

**#fullyremote-help:** share tips and unburden frustrations about our remote/quarantine experience

**#inspiration-knowledge:** insightful content we produce or find and content/ideas that can inspire our work

**#random:** a place for non-work-related madness

**#aniveldealmoçoremoto:** a way to keep having lunch together

### B) *Use channels for all your work*

Channels help you check in and keep projects moving. Channels also replace endless email threads when they're used to keep everyone informed about the status of work still to be done. Beyond replacing meetings and email, channels keep conversations focused, encourage the exchange of ideas and move work forward.

Here are some examples:

**#teamchannels:** a channel shared by each team

**#programchannels:** channels can be created to work on a program

**#projectchannels:** channels can be created to work on specific project

### C) *Customize your status*

Our coworkers can no longer see when we're away from our desks, so set a custom status to let everyone know that you've stepped away, or that you're offline, or on calls and may be slow to respond.

#### ***D) Run Check-ins and Check-outs in your team channel***

Set a specific time of day by which everyone should post their check-in/check-out in the team channel. Questions can follow in thread (if they're just for that person) or in channel (if they're for everyone/most people). Everyone can read up on what everyone else is working on, and to top it all off, we get automatic meeting minutes.

#### ***E) Direct messages***

Since with remote work we can't swivel our chairs around to say "Hey, can you look at this real quick?", you should use direct messages to send each other unfinished work to get feedback and ideas. Slack makes it easy to share Google Docs - just paste the link into Slack, which will then prompt us to adjust viewing permissions if the document isn't one they have permissions to see.

#### ***F) Face to face, wherever you are***

Communicating in writing can be difficult, particularly in more delicate or nuanced situations. Sometimes we just need to see

each other's faces and talk, out loud, with our mouths. For a quick call, you can use Slack's built-in voice and video calling feature.

#### ***G) Say it with emoji***

When we can't say "thank you," "good job" or "nice work" in person, we'll use an emoji reaction to do it instead. Everyone loves feeling recognized! An emoji reaction, or reacji, a word we keep insisting is real, is a quick and tidy way to communicate with our teammates.

### ***5.3) GOOGLE DRIVE - SHARE CONTENT SEAMLESSLY***

#### ***Why is it important?***

There's one source of truth that can be accessed from anywhere, which drives trust and awareness amongst team members.

#### ***How do we do it?***

We use Google Drive as our only content sharing tool.



## 5.4) ASANA - STAY ORGANIZED

### Why does this matter?

Organization drives accountability and alignment, allowing for stronger coordination across projects and responsibilities.

### How do we do it?

We use Asana - it's helpful in showing tasks and events, preventing us from endlessly searching chats or emails.

### 5.4.1) THE IMPORTANCE OF USING ASANA

Now that we are making the shift to remote work, it's more important than ever to stay coordinated and provide the clarity needed to move work forward.

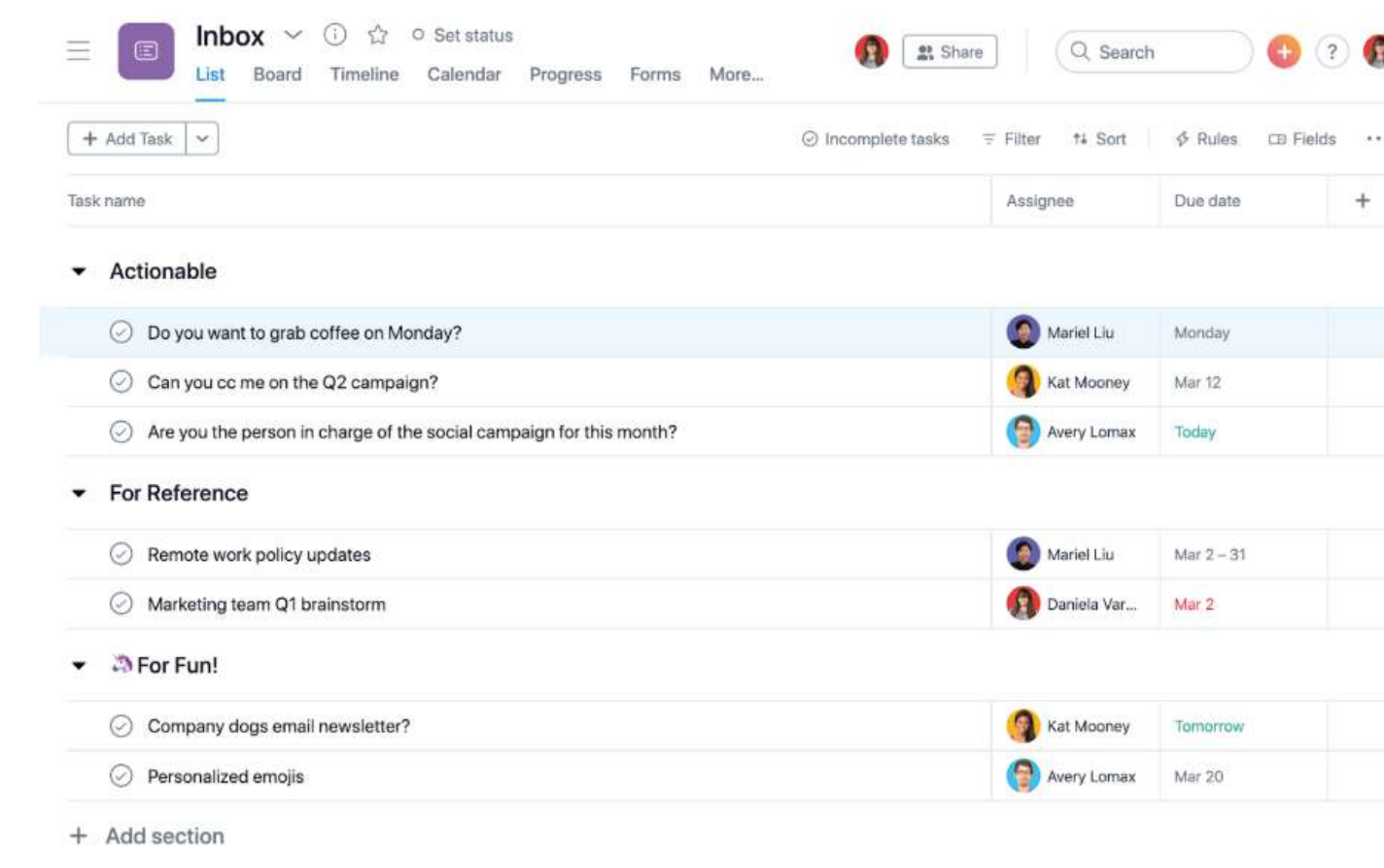
Building trust while working remotely.

Feeling plugged in if you aren't at the office can be tricky, and the truth is, we all need more visibility into our work. When you use a tool like Asana to collaborate, our team can easily keep each other accountable and know who is responsible for what—no matter where each person is located. Think of it as a central source of truth that everyone can tap into from around

the globe. Having a collaborative central source of truth like Asana helps everyone gain clarity across an organization, so you know who's doing what, by when, even when your team is remote. Some tips:

### A) Use "Drop in" projects to replace one-off chats and ideas

One of the advantages of working in an office is those just-dropping-by, see-you-at-the-water-cooler conversations—something that's nearly impossible to recreate when you're dialing in or only communicating through messaging apps. We recommend creating a special project to house those same types of brainstorm, conversations, and drop-in thoughts:



***B) Keep your team up to date with status updates and discussion threads.***

If keeping your team updated on your work is a challenge, status updates and discussion threads are the solution. With status updates, you have a one-stop-shop to update your team about the progress of your project. To make sure your team remains aligned every week, you can even set a reminder so Asana notifies you to send a status update every Friday.

***C) Provide context with conversations and comments.***

When we're working remotely, we have to compensate for the conversations we aren't able to have in person - we need to find a way to give color to our work and provide context behind what we're working on.

With Asana, you can do that by adding a comment when you mark a task as "Complete." Let the team know if they need to take any next steps.

***D) Indicate when and where work is taking place with custom fields.***

Custom fields are a great way to take even more control of our work and help each other everywhere get a sense of what each person is working on with just a quick glance. Custom fields allow us to clarify how long we think a task will take, specify the priority, or clarify how big the load will be.

Thinking about remote work, try creating a "WFH" custom field, where you can mark whether or not a project could or was completed remotely. Then, with Advanced Search reporting, you can sort by the "WFH" custom field and we will see what can get accomplished remotely.

Follow this [link](#) for the complete article on Asana working remotely tips.

## **6) RUNNING EFFECTIVE TEAM MEETINGS**

### **6.1) CHOOSING THE RIGHT ONLINE MEETING TOOL.**

We have two online meeting tools: Zoom and Google Hangouts Meet. We suggest using Zoom for wide company meetings and important client meetings and Google Hangouts for team meetings and one-to-ones.

(You can also try the Slack feature of phone/video call - it's useful if you're already communicating in a channel or having a direct conversation because you just switch from written to spoken conversation, but we are not sure about the quality of the call.) Be aware that we only have a paid account at Zoom (you can check the logins here) and we can only run one meeting from that account at a time. You can use the free version of Zoom with your own e-mail, but there's a 40 minutes limit for meetings. If that doesn't work for you, we recommend using Google Hangouts Meet.

## **6.2) SET AN AGENDA AND AGREE ON REMOTE MEETING GUIDELINES.**

For every virtual meeting, it's important to create a clear meeting agenda that includes:

- **Key talking points**
- **Meeting structure (for example, when and for how long you plan to discuss each talking point)**
- **Team members/teams that will be in attendance**

- **What each team member/team is responsible for bringing to the meeting**

- **Any relevant documents, files, or research**

Just as important as the meeting agenda are the meeting guidelines: the rules and expectations of how the team is expected to contribute to the virtual meeting. So, for example, can everyone speak freely or will the team leader call on someone when it's that person's turn to contribute? Does everyone need to have their camera on at all times or just the presenter? Should people mute their devices while others are speaking?

## **6.3) ETIQUETTE FOR ONLINE MEETINGS.**

While different meetings will have different "rules," there are some basic etiquette practices everyone should follow to create a smooth online meeting experience.

Think of them as the must-do's of online meeting etiquette:

- *Introduce everyone during the meeting, and give everyone a chance to contribute*
- *Don't stare at your phone while other people are presenting*
- *Don't interrupt other people when they're speaking (or attempt to speak over them)*
- *Test all technology (including camera/video, Wi-Fi, and screen sharing) before the meeting*
- *Read the agenda, and come prepared*
- *Don't work on other tasks (like checking email) during the virtual meeting*
- *Turn off all notifications and make sure your cell phone is on silent*
- *Make sure all team members are in a quiet area free from unnecessary distractions*

## **6.4) ONLINE MEETING FOLLOW-UPS.**

In order for a meeting to be effective, every person needs to walk out with a clear objective. The key things everyone needs to know are:

- *Deliverables and next steps*
- *Who's responsible for following up on each item or task*
- *When those deliverables are due*
- *When the next meeting or check-in will be*

And if you were the host, don't forget that an important part of meeting follow-up is checking in with attendees about how well the meeting went. Hearing from attendees may just give you ample ideas on how you can make future meetings even more inclusive and efficient for everyone involved.

## 7) PRO TIPS

### ***Maintain morning routines***

Maintaining your usual morning routine puts you in the right frame of mind for work. Keep exercising, keep showering (for the love of air fresheners, please keep showering), get dressed in “real” clothes, do your hair, make-up, shave, and trim those nose hairs – just as if you were heading into the office.

### ***Find the right space***

A dedicated space for working is ideal. But if you’re not set up for that, choose a spot in your home with minimal distractions and comfortable seating.

### ***Structure your day***

Structure your day the same way you would in the office, as much as possible. If you’re in the habit of devoting your mornings to deep work and using the afternoons for meetings and emails, do that at home. Don’t forget to build in breaks, too. Plowing away non-stop for eight hours will burn you out fast and it’s really

easy to do when you don’t have the “benefit” of all the little interruptions you get in the office. So pace yourself. Stand up and stretch. Fix yourself a cup of coffee. Strum your ukulele. Unload the dishwasher. Five minutes is all it takes to refresh your brain and get ready for another round.

### ***Stay connected on a personal level***

Carve out time for fun, too. Hold virtual coffee breaks or lunches where everyone hops on a video call together - have food, eat in front of the camera; it may feel weird, but it works.

We would like to challenge you to share photos of your messy desks, share animated .gifs, and fun remote moments you live at your place. Send them via slack.

### ***Keep it visual***

Sketch out ideas on a piece of paper, then take a photo with your phone and upload it straight to a channel in Slack from there to keep conversation flowing. Making slides to communicate an idea visually can take too much time—all that fiddling with font sizes, box widths and arrow alignments—and when we just need to get an idea across, pen and paper (and camera) do the job.

## 8) HOW TO STAY HEALTHY WORKING REMOTE?

### *Make the most of your time!*

Take advantage of the fact that you don't have to commute to your office - how much more time do you have during the day? If you spent 2 hours going to work, then use those 2 hours for other things: reading, catching up on some household chores, having a longer breakfast. Below you can find some sources of inspirations for:

### *Learning*

***Gaia, Blinklist, Audible, McKinsey Insights, CBinsights, Wikihow***

and join free online courses from top universities or learn more about technology!

### *Staying in shape*

***Gaia, Alo Yoga, DailyYoga, Freeletics, Blogilates, Aaptive***, and check it out:

***<http://www.glamour.com/story/best-free-workout-apps>***

### *Entertainment*

***Netflix, Youtube, Gaia, BFI, Spotify***, also take your time and make an online visit to ***zoos***, and ***museums***

### *And here are some apps that you should try!*

***Forest app*** will block specific sites and apps from your phone or computer for a certain amount of time to help you focus and minimize the madness. It gamifies the process and lets you plant a virtual forest with your productivity. It will even let you use tokens you earn within the app to donate real money to deforestation causes. Now you're productive and saving the rainforest!

***Pocket*** is an app which allows you to save articles, videos, etc. to access later, even offline.

***HabitBull*** is an app which helps you not only to build positive habits but also break bad ones.

THANKS FOR DOWNLOADING  
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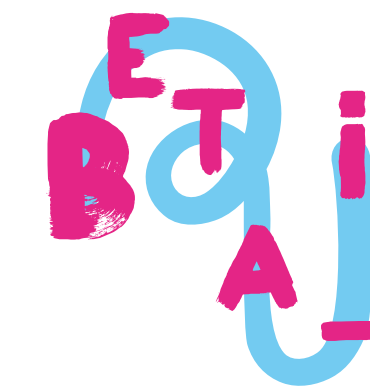
*We hope it inspired you to  
organize your remote work!*

Feel free to share your feedback and  
your own experiences with us!

Drop us an email at

[community@beta-i.com](mailto:community@beta-i.com) and join an  
open discussion on Beta-i social media!

*All the best,  
Beta-i Team!*



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