

**New Ways of Virtual Working for Clients**  
A guide for our clients in realizing their virtual office

23rd March 2020

# What this playbook is

## A resource for Deloitte clients as we navigate the shift to virtual delivery

Traditional models of project delivery are being challenged right now.

As businesses shift to virtual delivery, we wanted to share some of our learnings and actions that may be applicable for our clients and their projects.

This playbook is not intended as a definitive guide, but shared a resource for you to consider in line with your own business continuity plans.

### **The current Covid-19 situation will take time to fully play out**

And understandably a number of companies are concerned, even considering pausing or cancelling projects.

### **Organisations typically do their best work together, when they integrate capability and diversity**

The best teams activate their networks and ecosystems to bring capability to bear on issues together. It is critical for business continuity that this is maintained in a virtual context?

### **Deloitte will continue to work 'side-by-side' with our clients – even if it is in a virtual context**

Project teams usually prefer to be physically co-located, however teams are now needing to adjust to collaborate virtually.

### **We need to work together as we shift to virtual delivery across all project activities including:**

#### **1. Virtual working relationships**

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#### **2. Project ramp-up**

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#### **3. Project delivery**

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#### **4. Project ramp-down**

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#### **5. Making the most of technology**

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## Maintaining relationships

# Know how your stakeholders, project leads and key vendors are responding

As we all start to respond to COVID-19, it is vital that you understand each of your projects, stakeholders' and vendors' response plans and requirements so that you can comply and support each other as necessary.

### Leader checklist: Client COVID-19 Response

- Check-in with each of your stakeholders, project leads and key partners around their COVID-19 action plans
- Discuss your approaches to flexible or remote work arrangements
- Understand their policies, technology tools and preferences for virtual teams
- Understand any change requests that may be required to your contract terms in order to effect a new delivery model in a compliant manner
- Understand any changes in your invoicing and payment procedures
- Discuss any changes to work programs and funding releases and the impact on scheduled or forecasted projects
- Consider any regulatory implications requiring early engagement with your regulatory bodies (eg ASX, ATO, APRA, ASIC)
- Communicate any new information to your stakeholders, project leads and partners as appropriate
- Establish a process for regular communications and information sharing.

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# Maintaining relationships

## Staying connected

A shared understanding of virtual communication and working preferences is foundational to a successful virtual working relationship.

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### Leader checklist: Staying connected with your stakeholders, project leads and key partners

- Take a moment for a non-project-related check in with your teams, stakeholders, project leads and key vendors
- Do a two-way share of your virtual working plans, for example
  - Hours you may both be unavailable
  - Preferred communication tools/methods/timings
  - Any other circumstances you may need to be aware of
- Understand if their day to day role or remit has changed
- Schedule in a regular virtual touchpoints (independent of scheduled project touchpoints)
- Consider what traditional face-to-face relationship touchpoints can be done virtually, e.g. presentations, training, lunch and learn sessions etc.

# Project ramp-up

## Virtual collaboration technology and resources

Deloitte teams are using tools like the ones listed below to successfully deliver projects and connect virtually. You may like to try these on your projects to find what works best for your teams as they transition to virtual ways of working.

Purpose	Example Tools	Other Options
Internal team collaboration	 <b>Teams</b>	<a href="#"><u>Yammer</u></a>
Collaboration with external parties	 <b>Slack</b>	<a href="#"><u>Workplace from Facebook</u></a>
Video conferencing	 <b>Zoom</b>	<a href="#"><u>BlueJeans</u></a>
Instant messaging and screen sharing	 <b>Teams or Skype</b>	<a href="#"><u>GoToMeeting</u></a>
Shared whiteboard	 <b>Miro</b>	<a href="#"><u>Google docs</u></a>
File sharing	 <b>OneDrive</b>	<a href="#"><u>DropBox</u></a>
Project management	 <b>Jira</b>	<a href="#"><u>Asana</u></a>
Project wiki	 <b>Confluence</b>	<a href="#"><u>Basecamp</u></a>
Voting and Q+A	 <b>Mentimeter</b>	<a href="#"><u>Doodle</u></a>

### Supporting Material

- [How working remotely impacts employee wellbeing | Blog](#)
- [9 different ways our people can design their work week | Blog](#)
- [Transitioning to the Future of Work and the Workplace](#)
- [Future of Work: Ways of working in uncertain times](#)
- [Combating COVID-19 with resilience](#)

• Please note these tools are provided as illustrative examples only. There are many other products available in market and you should work with your inhouse technology, cyber and risk leaders to determine what is most suitable for your organization

• We always recommend you comply with your organisation's standards.

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# Project ramp-up

## Virtual working setup and support

Ensure your teams are prepared for virtual working, including equipment, tools and access.

### 10 top tips for remote working to share:

1. Designate a workspace for focus in your home
2. Develop a daily routine
3. Embrace technology tools for collaboration
4. Communicate frequently with your stakeholders, project leads and key partners
5. Communicate openly with your teams
6. Remain contactable
7. Do not over-rely on email/IM – use the phone
8. Block your calendar for “working time”
9. Dedicate time for informal social interactions
10. Regularly review performance with team leader

### Leader checklist: Virtual working setup and support

- ❑ Ensure your team take laptops/chargers and other equipment home each night in case circumstances change
- ❑ Ensure your teams have tested their remote access to the company systems
- ❑ Ensure team members all have IT support contact details at hand
- ❑ Ensure that teams have access to the agreed company collaboration tools as some need licences or software to be installed
- ❑ Confirm that your teams have the right equipment and designated work spaces
- ❑ Consider setting up an asset register if teams are taking company equipment home
- ❑ Make sure there are virtual options for all meetings and team sessions
- ❑ Test and learn what works best for each team, have regular retrospective sessions to improve how things are done
- ❑ Where possible and appropriate, share information and suggestions with other teams to coordinate your ways of working<sup>6</sup>

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## Project ramp-up

# Planning with your teams, stakeholders, project leads and key partners

Careful planning together with your teams will ensure expectations are communicated and contingency plans are in place.

### Leader checklist: Planning with your teams

- ❑ Agree and set up new ways of working with your teams, including cadences, tools and shared understanding of any personal working circumstances
- ❑ Be prepared to enact a Plan B:
  - ❑ Clarify the procedure should someone in the team fall ill or believe they have been exposed
  - ❑ Confirm critical roles and identify potential back-ups
  - ❑ Confirm critical information including meeting invites and file access, and ensure there is shared ownership and access
  - ❑ Understand what work is mission-critical and what can be deferred if needed
- ❑ Should a change in advice come from your organisation, key partner or the Health Officials, update and communicate any new working arrangements
- ❑ If contract terms (e.g., force majeure clauses, work health safety provisions, delivery milestones, permissible tools and technology, IP access rights, payment terms, project scope) need to differ from the standard, engage legal and any third parties or key vendors as early as possible
- ❑ Anticipate your need to engage early with regulatory bodies (e.g., ASIC, ASX, ATO, CAANZ/CPA) should changes to your project deliverables or project delivery have a regulatory impact

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# Project delivery

## Example virtual project touchpoints

Below are some examples of pivoting from physical project meetings and sessions to virtual touchpoints.

Project touchpoint	Example virtual project touchpoints	Example Tools
<b>Planning session</b> e.g Project Steer-co	Teams can share screen via <b>Zoom</b> . Zoom facilitates conversations with multiple people even external to your origination using video or audio. Project risks and actions can be tracked in <b>Confluence</b> .	  
<b>Alignment Session</b> e.g. Project Kick-off	Team can share screens and video conference via <b>Zoom</b> or <b>Skype</b> .	 
<b>Internal/External Workshops</b> e.g. Co-creation labs	Team can use <b>Zoom</b> to run and host a video conference, share screen and switch to Miro to collaborate or facilitate a workshop activity. Alternatively, <b>Menti</b> can be used to collect live answers to a question and conduct a vote via a live poll.	   
<b>Check-in Sessions</b> e.g. Daily Stand-up	<b>Zoom</b> can be used to host a dial in, while team members internal and external view an online <b>JIRA</b> board to visualise tasks and accountabilities, All updates can be tracked in <b>JIRA / Confluence</b> so everyone is aware of what's happening.	   
<b>Review Sessions</b> e.g. Project Retro / 360 feedback	Documents can be shared and edited collaboratively via <b>OneDrive</b> or <b>Teams</b> – a dial-in using the 'share screen' function within teams can be used to virtually walk-through a document with multiple people and edits can be made in <b>teams</b> or <b>OneDrive</b> after.	  
<b>Social/cultural events</b> e.g. team lunches, coffees	<b>Zoom</b> can be used for team video conferencing and social time e.g. virtual coffee or virtual lunch. Accommodates multiple video streams well and allows a gallery view so everyone has the same prominence.	 

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## Creating your own virtual workspace

Organisations and projects will need to identify the blend of online tools that works for them. This example shows how you might combine and use different tools to recreate some important physical situations.

### COLLABORATIVE WALLS

*Tools: Mural, Miro, Teams Docs*

Great to deliver training or co-creation sessions that require high levels of interaction between team members/ participants.

### STANDUP CALLS

*Possible tools: Trello, Zoom*

Stand-ups and Washdowns will use this as the basis for the daily check-ins.

### IDEATION ZONES

*Tools: Miro Board, Sketch*

Spaces where team members can collectively note down ideas, and evolve their thinking together.

### REFERENCE WALLS

*Tools: Miro Board, Teams*

Static references that would normally be stuck up on walls, located on a virtual wall.

### STORYSHARING

*Tools: iPhone Camera, Teams*

Video and visual updates on the project, shared by team leaders to help reframe the evolving vision.

### WORK IN PROGRESS

*Tools: Sketch, Miro, Outlook 365, Teams chat*

Sharing screens while working, or setting up live streams of work in progress, can help invite collaboration on tools that don't facilitate this.

### SHOWCASES

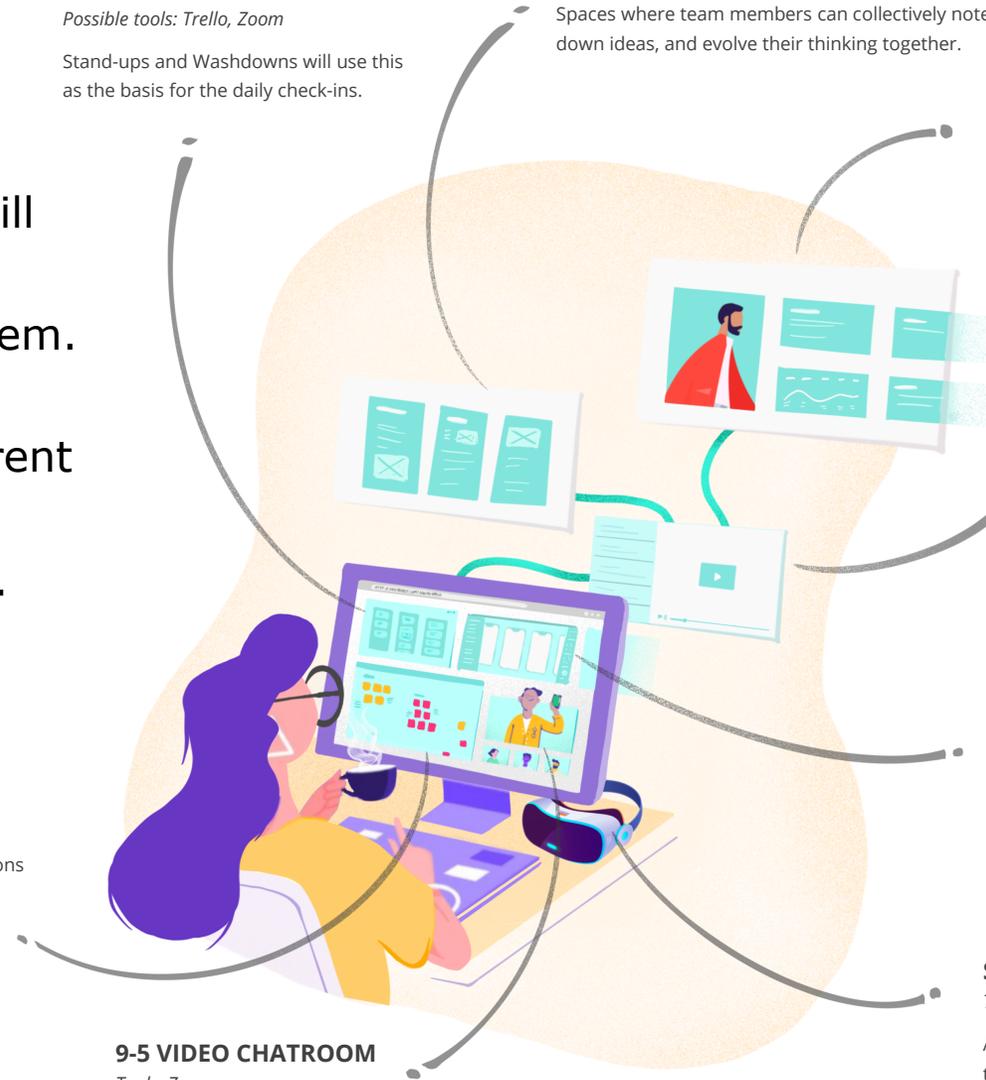
*Tools: Zoom, Miro, Storyboarder, Experimental Tech*

As the project evolves, it is important the team is thinking about how to showcase in a way that facilitates the right types of conversations.

### 9-5 VIDEO CHATROOM

*Tools: Zoom*

A video call that starts at 9am closes at COB. Individuals can jump in and out as needed. This can replicate the feeling of chatting with your team while working.



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## Confidentiality and Security

Teams should be familiar with all the security policies and prepared to maintain confidentiality whilst working remotely.

### Leader Checklist: Confidentiality and Security for team members

- Request that your teams review your organisation's policies and ensure security protocols are being followed
- Always use a VPN where available when accessing confidential information, as these typically provide additional security
- Ensure personal Wi-Fi connections are secure. Set a strong password and check wireless configuration to ensure that WPA2 encryption is selected
- Be extra aware and vigilant to avoid phishing attempts
- Practice good laptop security by locking computer screens and not allowing family members or other people to use your company laptop/devices. Keep laptops secure when unattended
- Do not use a personal PCs or other non-company devices unless the correct security software is installed
- Do not use personal email accounts or other non-company/unapproved cloud platforms to communicate or share information or files
- With increased email traffic, consider enforcing password encryption across all attachments and secure the use of electronic signatures
- Secure any hard copy materials in safe place.

### What to do if you suspect a confidentiality, privacy or security breach?

Get in touch with your company's security team or risk leader immediately.

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# Project ramp-down

## Closing our projects

Ensure that all files have been handed over securely and virtual communication and file sharing has been securely closed.

### Leader Checklist: Closing the engagement

- Remove any sensitive information from virtual tools or computers, and archive in agreed repositories
- Compile a close-out report of deliverables, assets and files and their location
- Close down virtual tool including chats and meetings
- Conduct lessons learned review meeting, and share to contribute to organisations continual learning
- Conduct a wrap-up meeting or project close-out meeting
- Hold a virtual team catch-up to celebrate the completion of the project, or look at alternative ways to reward your team and celebrate.

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# Making the most of technology

## Guidelines for holding successful virtual meetings



### Include dial-in details on all meeting invites

Including relevant MS teams, Skype or Zoom details on all invites is a small act that goes a long way, ensuring virtual workers are always included.



### Use the mute button

Use the mute button to prevent transmitting background noise when you're not speaking.



### Give everyone an equal opportunity to share their voice

Meeting leaders should use purposeful breaks so that everyone has an opportunity to contribute. If you're a participant, use the raise hand feature if you can't find a break in the conversation.



### Turn on your camera

Turn on your video wherever possible and be camera ready. This helps all team members get the most out of virtual meetings.



### Time your meetings and keep them short

Not all meetings need to be 45 – 60 minutes long. Aim for short concise meetings that run efficiently—stick to an agreed agenda.



### Be on the call 2-3 minutes prior, or 5 if you are hosting

Join virtual calls 2-3 mins early to ensure an on time start. If you are the host aim for 5 minutes prior to ensure everything is working correctly.



### Use digital collaboration tools

If one or more members in the meeting are attending virtually, consider using digital collaboration tools such as an in-built whiteboard.



### Take your call somewhere quiet

Find a quiet space to participate. Open plan environments are saturated with background noise— make sure you use a professional headset.



### Include meeting agendas/provide everything needed

In the event that screen sharing does not work ensure others have copies of the file prior to the call (at the very least the facilitator).

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## Video conferencing: Zoom



Zoom is a modern and feature rich video conferencing platform and here are some tips to make the most of your Zoom experience.

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### Zoom– quick tips

1. Install the outlook plugin for easy meeting set up
2. Turn on your camera - it's always better to see faces and expressions
3. Use the chat function to ask questions of the presenters
4. Real-time annotations are a great way to collaborate
5. Turn on the virtual background feature if you need to obscure what is behind you, or if you just want to add some personality to your picture (just make sure to keep it appropriate!)
6. Laptop users can use 'push to talk' mode – when you're on mute, if you want to make a quick comment, just hold down the space bar to speak.

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## General collaboration and video conferencing : Teams



Teams is the Microsoft 365 chat-based collaboration tool that provides the ability to work together and share information through document collaboration, one-on-one chat, team chat and video conferencing.

### MS Teams – quick tips

1. Set up a project specific 'team' within MS teams, this will have a chat space and a file storage area – you can add your own file structure
2. Install the Teams outlook plug-in for easy meeting set up
3. When using the teams call or meeting function turn on your camera - it's always better to see faces and expressions
4. Upload documents to the files section of your team to live collaborate on Word, Excel or PowerPoint documents as a team or to present work product in a Teams meeting
5. Create multiple 'chats' within your project team to allow team members to communicate on different streams of work.

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## Shared whiteboard: Miro



Miro is an online collaboration tool allowing remote teams to work on a whiteboard workspace from planning to designing in real time.

### Miro – quick tips

1. Open a board, invite the team and let them use their virtual sticky notes to add their ideas
2. Set a time limit and allow remote team members to add their ideas around a particular focus
3. Save the board and allow others to add ideas later who aren't able to attend the workshop or meeting.
4. Go beyond brainstorming and workshopping; use Miro for strategy mapping, Agile ceremonies, UX research and design and process visualization
5. Also use Miro boards for a social hang-out, ask the team to upload a picture of their day.

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# Making the most of technology

## Project wiki/project management: Confluence and Jira



Together, Jira and Confluence offer one powerful, seamlessly integrated solution for project management. Together, they can help your teams work faster by tracking tasks, communicate more effectively, and keep documentation organised and accessible.

### Confluence & Jira – quick tips

1. Set up a Jira board to assign tasks or work streams to individual team members Use the chat function to ask questions of the presenters
2. Use the Jira board to facilitate a daily stand-up around task completion and progress
3. Use confluence to store files and work in progress, linking this to the tasks on the Jira board
4. Confluence can be used for more than file storage, create a calendar to track team commitments or project milestones and celebrations like birthdays.

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# Making the most of technology

## Voting and Q&A: Mentimeter



Is a polling tool wherein you can set the questions and your audience can give their input using a mobile phone or any other device connected to the Internet. Mentimeter helps you become a better-skilled presenter by giving you more engaging presentations as well as getting unbiased input during your meetings.

### Mentimeter– quick tips

1. Build an interactive presentation by using the online editor. Add your questions, polls, quizzes, slides, images, gifs and more to your presentation to create fun and engaging presentation
2. When you present, your audience uses their smartphones to connect to the presentation where they can answer questions, give feedback and more. Visualize their responses in real-time to create a fun and interactive experience
3. Once your presentation is over, share and export your results for further analysis and even compare data over time to measure the progress of your audience.

# Thank you.

For more information and any assistance needed with virtual ways of working

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