

Tools for Supporting a Remote Workforce

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Introduction

Treney Incorporated is a non-traditional consulting firm and has supported a remote workforce for more than 10 years. Providing a variety of secure communication, coordination, and collaboration tools is key to enabling our analysts to support clients in a variety of environments. New tools for remote workforces are released all the time, therefore our team evaluates offerings and adjusts our portfolio of tools on a regular basis.

Companies have been forced to support a WFH model quickly. The tools chosen over a period of days in February or March of this year might not be the right tools to support employees in the long run. Therefore, we would like to share our assessment of the major options supporting communication, coordination, and collaboration. There are many more tools than our assessment includes, but we have tried to highlight the most commonly used tools. We will also share what we have chosen to use and why.

Our hope is that companies find this information useful. Most importantly, we hope companies choose and deploy tools that will enable cost reduction and improved efficiency within their WFH model in the long run.



Contents

4

A New Way to Work

5

The Three C's of 2020

6

Communication

Business Suites

Microsoft 365, G Suite

Email

Outlook, Gmail

Instant Messaging

Microsoft Teams, Slack, WhatsApp

Conference Calls

Zoom, GoToMeeting, Webex

10

Coordination

Basecamp

Asana

Trello

Microsoft Project

Harvest

GitHub

13

Collaboration

Zoom

Dropbox

OneDrive

15

Support

ServiceNow

PagerDuty

EVAN360

18

About Trenegy

A New Way to Work

Mandatory social distancing requirements have created challenges for companies as they determine how to support a work-from-home (WFH) model. The initial disruption has been addressed by companies that normally do not support remote workforces by spending an average of \$200,000 to establish a technical infrastructure, allowing for secure access to critical systems.

While these investments have been unexpected, they have provided an opportunity for companies to reduce real estate and other overhead costs in the long run by allowing employees to take advantage of the WFH model. Statistics show employees are generally proving to be more productive and work more hours at home. The biggest increase in productivity is the result of working through normal commuting times. This has led executives to ask: how can companies properly support the WFH model in the long run?

We have some answers—or at least a series of suggestions that have worked for us.

The Three C's of 2020

2020 is turning out to be the year of working from home. Companies without experience managing remote workforces may have no choice but to adopt the WFH model and are challenged to keep employees productive. Remote workers are no longer communicating in-person with their supervisor or peers for conversations about specific work items. Meeting face-to-face with customers and prospects is equally challenging.

Project teams struggle to coordinate activities when members are no longer in the same room. Employees can't collaborate by walking to a fellow coworker's desk, chatting over the proverbial water cooler, or having break room discussions over coffee. Worse, employees struggle to find collaborative, real-time support when problems arise that bring work to a halt.

Communication, coordination, and collaboration must be sustained in the long run if the WFH model is to succeed.

Communication

Connecting with peers, supervisors, customers, and prospects doesn't have to be complicated. These are a few tools that foster communication when in-person conversations aren't an option.

Business Suites

Microsoft Office 365 and Google's G Suite are the two business suite front runners. They are similar in many ways on the surface, but each has unique functions and capabilities conducive to different types of businesses. They both have word processing, spreadsheet, email, calendar, video conferencing, instant messaging, and cloud storage capabilities (among others). In general, G Suite is simple, intuitive, and collaboration-friendly. Office 365 has more powerful features and extensive functional capabilities. If your company values simplicity, live-editing, and real-time collaboration, G Suite might be a great option. If you require more complex templates, charts, and presentations along with powerful functionality, Office 365 might be best. Honestly, one suite alone probably won't serve all your needs. Many companies require additional tools and use a combination of offerings from Microsoft Office and G Suite that works best for them.

Email

Outlook

Almost all large organizations use Microsoft Outlook for email. If a large company is your client/customer, you will want to use Outlook too for optimal communication. Calendar invites sent from a Gmail address to an Outlook address can get skewed and don't always come across correctly. Thus, people miss meetings and productivity is hampered. At Trenegey, all of our clients use Outlook, so we do too. It helps to be knowledgeable about the platforms your clients use in order to best serve them. Bottom line, Outlook is best for small or large businesses that serve larger companies.

Gmail

If you're just using email internally and don't have business customers, it doesn't really matter which email platform you use. Gmail is better for small businesses or startups that serve consumers. Gmail has a slightly simpler interface than Microsoft 365, so many users find it more intuitive.

Instant Messaging

Microsoft Teams

Microsoft made a significant effort to combine the functionality provided by Lync and Skype into a new product called Teams. Teams can be used for instant messaging and conference calling. Many organizations using Office365 leverage Teams because it's included with the subscription. At Trenegey, we use Teams but find it a bit lacking—maybe this is due to the broad a range of functionality. Setting up channels as you can in Slack or sending messages to specific people is not as intuitive as we would like. However, integration with Microsoft Office is fantastic, especially with Outlook. Administering end users is painless when using the Office 365 administrative functions.

We have found that Teams is very sensitive to internet bandwidth when using the conference calling features on a PC or through the smartphone app. Video and audio is usually choppy if end users are on a slow connection, making it an unreliable and inconsistent tool. With a larger group of people, there's a higher chance of lags, delays, dropped calls, and echoing. We have experienced challenges with the platform multiple times, and we've ended up switching over to Zoom mid-meeting. Ultimately, it has not been the most reliable platform for video conferencing.

Slack

Slack has been widely adopted by organizations of all sizes and industries, and once you use it, you'll know why. It's great for small businesses, startups, and individual teams within larger companies. It's a quick way to get questions answered and share updates and it's more convenient than email for internal communication. Slack cuts the clutter and spares you the long email threads and reply all messages that flood your inbox. Multiple channels allow conversations to remain well organized, and the option to have multiple workspaces makes it ideal for large companies with many departments, project teams, and staff. One downside: Slack is great for project teams, but if there are 100+ team members, there's likely to be more commotion within the platform.

WhatsApp

WhatsApp is most commonly used as a platform for social or casual conversation with family and friends—that's what it was originally designed for. But businesses can still utilize it. It offers free voice calls, video calls, document sharing, and messaging when connected to the internet. Voice messaging works well when you don't have time for a call, want to document an idea in the moment, or want to relay information to a group but don't have time to type an email. It allows for international communication as it is available in 109 countries at the time of this writing. WhatsApp also offers a version designed for small/local business owners, which allows you to create a business profile and answer customer questions or messages in the app.

While WhatsApp is a great tool, it's an extra app to keep track of that does everything your smartphone does. You can text, call, video chat, and send voice messages from your phone already. WhatsApp is free, but most companies opt to use Slack and smartphones for the same purposes.

Conference Calls

Zoom

Zoom has become so widely used due to COVID-19 that, much like Google, it's become a verb. It's an ideal choice for video conferencing because it's simple, intuitive, and user-friendly. Overall, the screen sharing, whiteboarding, chat, and host monitoring capabilities work well. As many companies have discovered, Zoom is a great option for remote workforces. Zoom works better than Teams if you have a slow or spotty internet connection or people accessing the tool from multiple platforms (Windows, iOS, Android). Zoom easily integrates with Outlook and anytime you move a meeting in Outlook, it automatically reschedules the Zoom call, too.

GoToMeeting

GoToMeeting competes head-to-head with Zoom but seems sensitive to internet speeds. During the COVID lockdown, GoToMeeting servers seemed to be overloaded and many end users reported difficulty connecting to conference calls and resorted to just calling people directly. Integration with Microsoft Office is challenging and not intuitive. Changing GoToMeetings in Outlook requires two steps: changing the Outlook invite then logging into the GoToMeeting website to move the meeting there. Leadership at GoToMeeting has admitted to some of the challenges and we look forward to the next update.

Webex

Webex rounds out the top three go-to conference calling applications. It competes directly with Zoom and GoToMeeting but also suffers when internet speeds are slow. Integration with Microsoft Office is limited and the calling packages can be quite pricey. While Zoom allows you to easily view all participants at once, the Webex interface is a bit more complex. We hope competition in this space will encourage Webex to address these challenges to provide end users with another good option for conference calling.

Coordination

Managing projects and project teams remotely can be challenging. These tools are designed to keep project team members informed and accountable for tasks.

Basecamp

Basecamp is a project management tool that's simple, easy to use, and customizable. It helps teams keep project progress, details, and deadlines well organized so there's a clear view of projects from start to finish. If you have projects that require a lot of back-and-forth conversation, approvals, and communication that's too much for your inbox to handle, Basecamp is one of the best tools for the job. Many organizations have found it to be a great alternative to email when it comes to internal collaboration. You can set automatic daily, weekly, or monthly check-in questions for team members, which replaces the need for frequent status updates. You can comment on them for further discussion and you don't have to chase people down for updates (unless of course they don't answer the check-in questions). However, a common complaint from users is that you can't mark tasks as dependent on other tasks, which is a top feature of Asana.

Asana

At a basic level, Asana is a great project management tool that allows teams to track and view tasks, due dates, and assignees all in one place. You can manage multiple projects and teams within the platform. You can upload files, notes, and descriptions within each task listing, and unlike Basecamp, you can create sub tasks, group tasks, and dependent tasks.

We use Asana at Trenegey because we can view, update, and integrate tasks quickly. We migrated away from Microsoft Project since it was too difficult to keep each team member's tasks up to date because of administrative limitations. Using Microsoft Project, we had to create separate weekly status reports to make sure tasks remained updated. Now Asana has become our status report since individual team updates are easy.

Trello

Trello is a basic project management tool that functions as a Kanban board. Visually, it's a digital bulletin board where each task is a sticky note you can move around as a project progresses. Small teams will probably benefit the most from Trello as it's not ideal for complex projects or large teams. If you're looking for a tool with more robust functionality, Basecamp or Asana are probably better options. If you simply need a way to track the progress of your tasks and make sure every assignment is getting done, Trello could be a great option.

Microsoft Project

Microsoft Project was designed as the top integrated project management tool for critical capital and IT projects. It successfully supports traditional waterfall methodologies and the newest version supports robust resource management. Better, the current version of Project is tightly integrated with Office 365 and enables all project team members with licenses to stay updated regarding the latest changes.

On the other hand, many organizations have migrated to Agile methodologies for IT, which results in significant changes to short-term project schedules. These changes can make using Project cumbersome. It's still a great option for large, complex capital projects, but we find Asana more beneficial for our consulting projects. Our smaller clients also find the licensing cost of Project a bit steep.

Harvest

This flexible time-tracking software is designed for contract workers, freelancers, or small businesses. Harvest's capabilities include time and expense tracking, team management, and invoicing. It's important to note that while Harvest does allow you to track and manage project time and expenses, it's not a true project management tool. Harvest only offers scheduling capabilities within their sister app, Forecast, which is an extra, albeit inexpensive, fee.

If you have a remote workforce, Harvest might be a great way to see what your team is working on and how much time they are spending on specific projects. Harvest isn't ideal for larger companies that require a more robust accounting or expense tracking software. However, it could work for individual departments within larger organizations.

GitHub

GitHub was developed to support Agile methodologies and remote development teams by hosting software development and version control using a tool called Git. Microsoft purchased the company in 2018 to expand its capabilities to provide support IT development efforts. GitHub does a great job of helping manage remote developers as they work within the same source code. GitHub provides strong distributed team management, project management, and most importantly, version control and source code management.



Collaboration

Brainstorming, whiteboarding, war-gaming, and assisting are necessary to help employees perform new tasks correctly and keep ideas flowing. It's a challenging category to support, even with the wide variety of available tools.

Zoom

In addition to video conferencing, Zoom has basic whiteboarding and screen sharing capabilities that are ideal for remote teams. You can pull up an annotatable whiteboard during your video meeting to brainstorm and share ideas or share your screen easily for visual collaboration. While many video conferencing tools are available and have similar capabilities, we love the reliability, consistency, and accessibility of Zoom for business purposes.

Dropbox

At Trenegey, we use Dropbox to store, safely back up, and share our files. It stays up to date, it's always live, and our files are never at risk. Dropbox keeps old versions of files in case you accidentally delete or save something over a document. You can sync it with your computer and restrict or share files easily. If two people are working on a file at the same time, it either warns you so you don't save over it or it saves a separate version. Some basic functionality, like copying a link or downloading a file, isn't super intuitive at first. The user interface is a bit clunky at times, but it's still fairly easy to use.

You would be surprised at the number of organizations that only back up files once a week, once a month, or never at all. For us, file backups and sharing across teams is crucial. We work on multiple projects and documents every day that require frequent backup to the cloud. When we're working remotely, we share, update, and organize files quickly using Dropbox.

OneDrive

Microsoft OneDrive is an excellent tool to store, safely back up, and share files for small and large organizations using SharePoint. OneDrive is included in the Microsoft Office 365 subscription with significant cloud-based storage. Small companies with little need to share files across teams can use OneDrive to prevent data loss. Setting this up is easy as all contents in the desktop, document, video, music, and picture folders can be automatically updated in the cloud with no user interaction or performance impact.

SharePoint and Microsoft Upload Manager are required if an organization wants to manage file-sharing across teams. The administrative functions are not intuitive and often require SharePoint development. Unfortunately, Microsoft Upload Manager for SharePoint uses quite a bit of bandwidth, which has caused issues for our clients when we tried this configuration. Our clients were complaining that we were using too much network bandwidth. We reverted to Dropbox and have had little trouble since.

Support

Support could be considered a fourth “C.” Maybe we should spell it “Cupport” so we can say that 2020 is the year of four C’s. Unfortunately, our grammar editor won’t allow us to use this clever marketing technique.

Why Support Matters

Providing support to remote workers so they can perform day-to-day tasks quickly and effectively is a challenge. Working from home means employees no longer have the ability to walk down the hall or pop in a colleague's office to ask a question. Some companies are trying to fill this gap with IT ticketing systems, Slack channels, Microsoft Teams, and other tools that simply do not facilitate the one-to-one requester-to-expert discussion. Employees struggle to get issues addressed in a timely manner and often carry the frustration of waiting for an answer into their work, making them less efficient and effective.

Unfortunately, these models also burden experts with numerous notifications outside their areas of expertise, making them less effective. The experts must stop what they're doing and read each Slack message or help ticket to see if it pertains to them.

There are several tools on the market that facilitate the on-demand matchmaking between requester and expert. However, most are expensive, complex, and difficult to implement. There's only one tool we have found that requires minimal setup and can truly be used out of the box by small and large organizations: EVAN360. Larger organizations can implement EVAN360 in hours or days depending on how many users are brought onto the platform.

ServiceNow

If a company has a large and highly sophisticated IT department, a strong IT ticketing system like ServiceNow is typically implemented. End users can use ServiceNow to log tickets to get support for IT failures. End users can also self-assign priorities to problems to get timely attention from IT support groups. Unfortunately, ServiceNow suffers the same challenges that all IT ticketing systems do. End users generally dislike ticketing systems because many tickets seem to vanish into a black hole. Employees don't receive the timely support they need to continue performing day-to-day activities. ServiceNow has sophisticated workflows to overcome these challenges, but the system can be costly to implement, and large consulting firms have teams of practitioners dedicated to serving complex implementations.

Recently, we've seen ServiceNow encouraging customers to extend the use of ticketing to provide support for issues beyond IT. Based on our experience, ticketing systems are not well suited for these types of support requests. Typically, when an employee has a business question, they need an answer immediately and ticketing systems were never designed to provide immediate support.

PagerDuty

At a basic level, PagerDuty is a cloud-based, SaaS incident response platform for IT departments. One of PagerDuty's strengths is automatically notifying the right technician when software or hardware faults or fails. A sophisticated workflow enables the platform to contact the technician via email, then messaging, and finally a phone call. With all this power comes quite a bit of complexity and cost. While PagerDuty offers a variety of online help videos, the user interface can be confusing and implementation can be a challenge. Unfortunately, the model does not seem to work well in supporting basic business issues.

EVAN360

EVAN360 is a cloud-based, SaaS platform that provides instant, personalized support to end users. It's essentially a "smart pager" or expert network that matches end user support requests with the exact expert who can address the issue right away. End users log into a portal and choose the type of issue or question they need addressed. The platform matches them to available experts based on skills and enables various forms of communication. The expert can call the end user, use the platform to communicate via Zoom or Teams, or chat via instant messaging. At Trenegey, we use this platform to improve productivity and speed up the problem-solving process. It's reliable, responsive, and has the simplest interface of all the support tools we've tried.

Companies can use the platform in diverse ways. It works for HR, IT, field engineering, manufacturing, retail operations—you name it. It's customizable to fit business needs.

About Trenegy

Trenegy is a non-traditional consulting firm providing advice to organizations of all sizes. Due to the shift to remote work, Trenegy has focused its practice efforts on implementing solutions that allow companies to get the most out of their current systems. Learn more at trenegy.com.

We'd Love to Hear From You

We would love to hear your feedback on our assessment. Did we miss anything? What other products should we include in our next assessment? Feel free to direct message us on Twitter [@trenegy](https://twitter.com/trenegy) or email our Managing Director at peter@trenegy.com.