



Make Remote Work

Growth Strategies for the Remote Economy.

By Clare F. Price

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Foreword

On March 19, 2020, Governor Gavin Newsom shut down the entire state of California. Affecting 40 million people, a \$3.1 trillion economy came to a screeching halt. Newsom's directive ordered everyone to Shelter in Place. New York Governor Andrew Cuomo followed one day later, and the rest of the nation locked down in the days that followed.

The reality: All nonessential brick and mortar businesses closed. By contrast, online businesses remained open . . .

We've been moving toward an online economy for decades. Yet, according to the Executive Next Practices Institute: "companies are only 12% of the way there in digital transformation."

So, as we look beyond the fallout from COVID-19, and plan our rebound strategies, it's time to embrace new world realities, or as many say, the new normal. And that new normal is a remote economy.

The best way to restart, rebound and thrive in the new remote economy is to begin the digital transformation of bringing your operations – to the extent you can – online.

I envision personal trainers, plumbers, hair stylists and dentists bringing their businesses online, to the cloud, and reaping the rewards that ecommerce, software companies and online retailers have been enjoying for years.

The technology is here to support you. The time is right. The circumstances that drove us initially to Shelter in Place could be the best opportunity your leadership team may ever have to make permanent operational changes for effectiveness and efficiencies that will protect your business from the turmoil of every type of economic cycle.



Welcome to the New Remote Economy

I think we all know by now that the changes we have experienced in the early months of 2020 are not temporary. We are experiencing a paradigm shift to a new business and economic reality: a remote economy.

In this remote economy, production, distribution, trade and consumption of goods and services have shifted. Across all industries commerce that begun with the industrial revolution are moving to the traditional lines of commerce begun with the industrial revolution to an online services model that impacts every area of our lives from daily living, to worship to work to education.

“ 74% Of CFOS say they expect to move previously on-site employees (to remote work) post COVID-19, according to a Gartner survey. ”

It's been moving that way for years. Now it is our lifeline. The Internet is our 2020 version of the ancients' Silk Road.

Make Remote Work is a resource guide to help you restart, rebound and thrive as you make the transition to the remote economy. We'll help you with strategies, tools and action steps in three areas:

1. **Developing a remote workforce**
2. **Transitioning your business operations to the cloud**
3. **Innovating your products and services to the new remote economy.**

Make Remote Work is the just the beginning of the resources you will be seeing from Octain because we are all going to need new Growth Strategies for the Remote Economy.



Remote Now for a Brighter Tomorrow

Our new remote economy will be characterized by a level of flexibility, mobility and innovation not seen before. The emerging remote economy is a bright light and beacon for our global future.

Moving forward, businesses that embrace the remote economy will win, grow, and thrive. Others will be left behind.

Your customers want it.

- **Hassle-free buying experience**
- **Self-service, self-select**
- **Purchase with a click**
- **Doorstep delivery**
- **Online peer reviews and community advice**

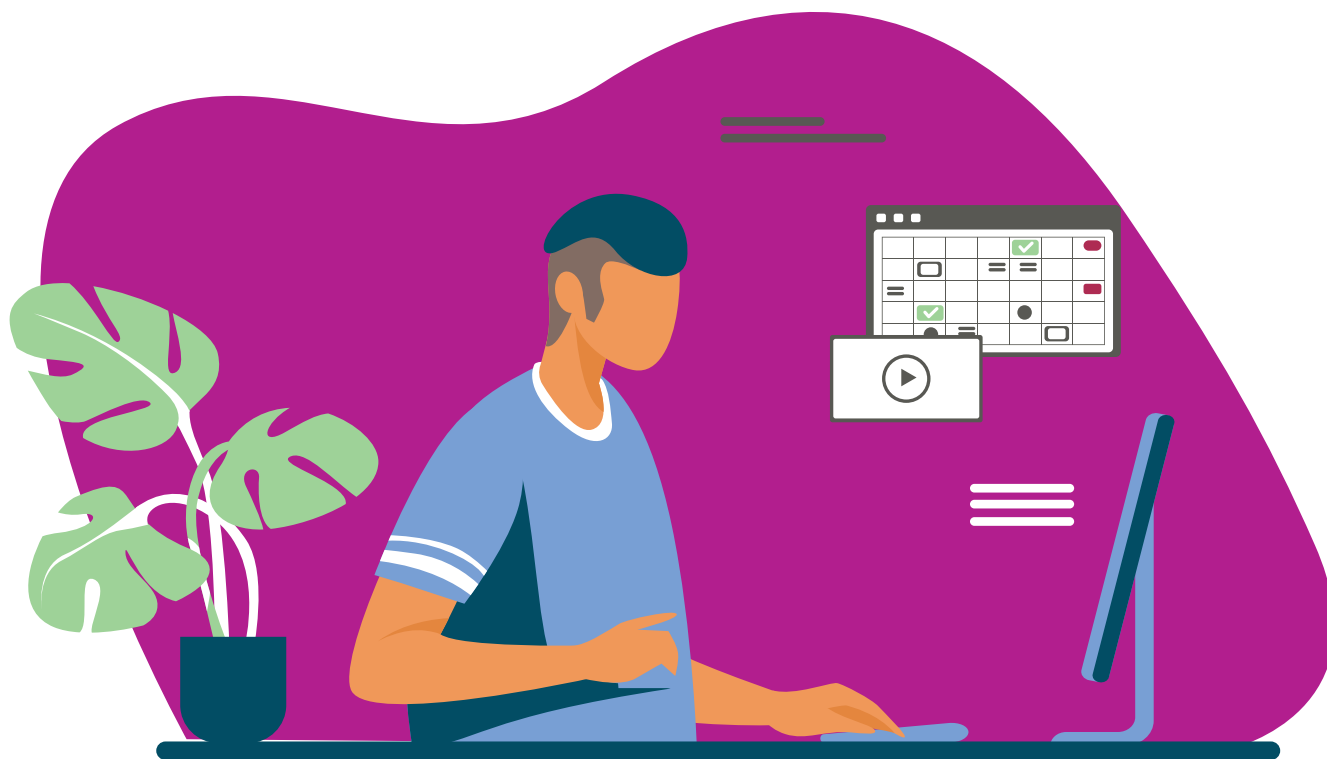
“ Moving forward, businesses that embrace the remote economy will win, grow and thrive. Others will be left behind. ”



Your employees want it.

- Work/life balance
- Time for kids, aging parents, hobbies and pets
- Flexibility to work when and where they want
- Quality of life

“Your top talent wants to live where they find quality of life not where the major work hubs traditionally have been.”



Your business needs it.

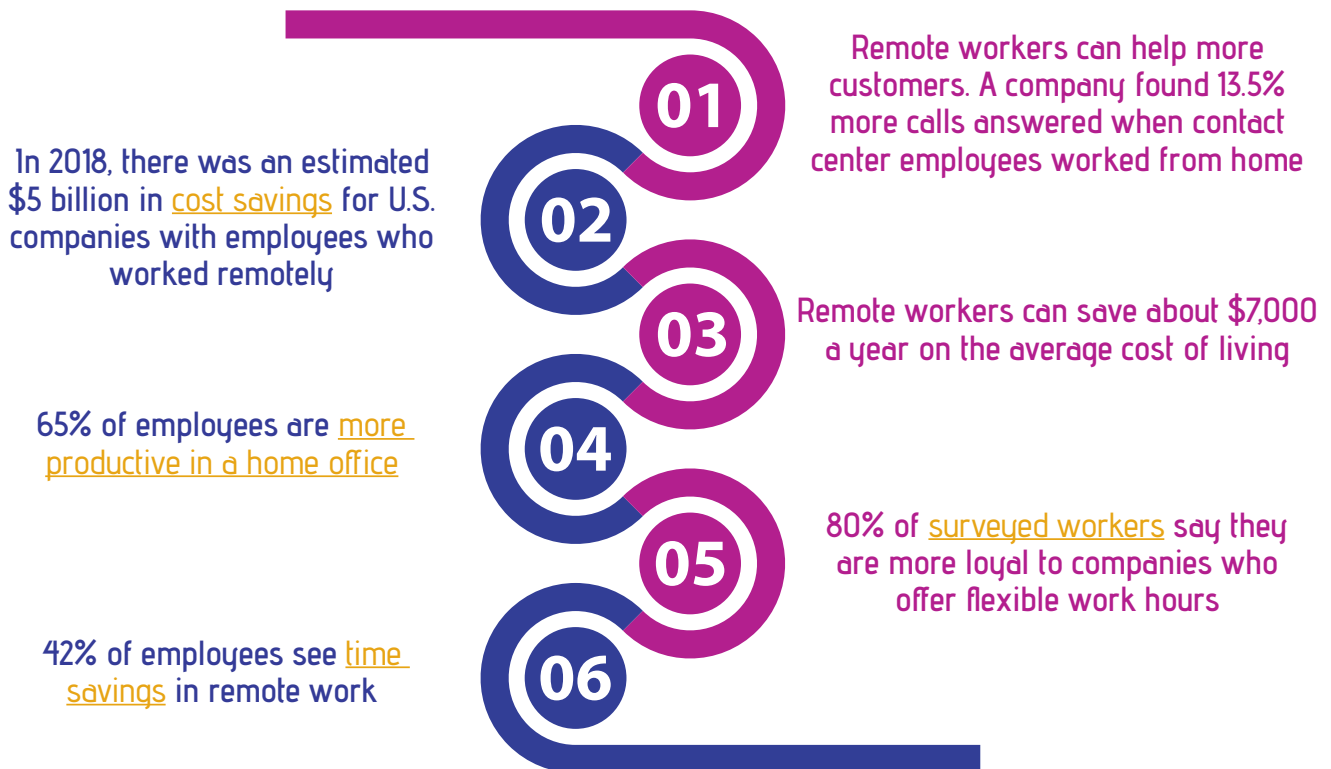
Bringing your business to the cloud delivers fast and sustainable ROI. Cloud-based operations save time, increase quality and reliability and enable metrics tracking for continued improvement.

- **Reduce time and costs of doing business**
- **Improved quality**
- **Greater visibility – dashboards monitor everything**
- **More efficient task management**
- **Improved operational stability**
- **Greater customer satisfaction**
- **Cost optimization and no initial investment**
- **Scalability. Room to grow**

“ In the post-pandemic world cost controls and operational efficiencies offered by the cloud will separate the winners from the losers. ”



The Results are In



“ Take Note: There is a Make Remote Work solution that will work for your business and team. ”

Kelle's Story



The year was 2015 when I rejoined California Family Fitness after a debilitating fall that broke my knee and left me unable to walk without a cane. From my first workout with personal trainer and certified rehabilitation specialist, Kelle Santin, I knew I had found a way back to wholeness. Over the next two years we worked on strength, balance, coordination. Now I'm able to walk short distances without a cane. Getting stronger every day. Without Kelle I would not be walking. Oh, and I lost 15 pounds too.

When her employer California Family Fitness closed due to Shelter in Place rules in Sacramento, Kelle was immediately unemployed. As a personal trainer who works hands on with her clients, Kelle had to figure out what to do next.

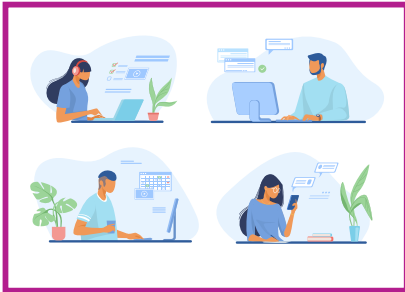
With the help of the recommendations and resources now provided in Make Remote Work, Kelle was able to find new employment with a few days with [Flight Live Fitness](#) and launch her remote work career.

“ Without Clare's help and innovative thinking, I would have never considered leaving my 'big box' gym to go out on my own. Clare was able to show me a bigger picture of what my business model could be, and with the COVID-19 virus shelter in place order, this has become even more pressing. I have since found success with online training and developed a new growth mindset in the area of my business. Thanks Clare for all your support!

”

What We've Got for You

Three sections focusing on the three areas critical to success in the new remote economy.



Your People



Your Process



Your Product

Your People: Managing Remote Workers

Remote work changes everything: how we hire and manage people, roles and responsibilities, communication and daily work rhythms including staying focused and productive amid practical life distractions.

Remote workers are the engine of the remote economy and the benefits are clear from higher productivity to the high talent labor pool your company can access.

Remote workers and a virtual talent pool give your company the flexibility to respond to the ups and downs of every economic cycle.

“If the right person is selected, his or her work production has the potential to increase by 30% to 300%.”

- *Lighthouse Consulting*

Your Process: Your business in the cloud

“We’re only about a third of the way into the cloudification of enterprises.”

- Andy Kessler, WSJ

Cloud computing is your best operational resource for sustaining business growth in the remote economy.

If you are a major manufacturer or have a highly technical custom product sale, you are likely thinking, “No one is going to put my product in a cart.”

Then again, you probably know they [design and sell cars](#) that way now. eCommerce is only one avenue.

Move your business to the cloud. Product development. Manufacturing. Operations. Marketing. Sales. It all works in the cloud.

Your Product: Innovation

Reimagine. Reinvent. Retool.

New opportunities are emerging with the surging remote economy. Now is the time to rethink your products and services to meet new customer needs and desires and serve them the way they want to buy and consume your products.

In the remote economy, your products and services will have the best opportunity for long-term success when you consider two things: how can you bring your products and services online? And how can you develop a subscription pricing model?

“The only way to discover the limits of the possible is to go beyond them into the impossible.”

- Arthur C. Clarke

A Work Life Lived Remotely

Looking beyond the current uncertainty and confusion, I have to admit that I'm excited about where I see us going with remote work. I've been using the Make Remote Work model for most of my career.

Early on as a young tech reporter I worked in a remote satellite office for a major New York publishing company and then equally remote as an Internet Strategies Analyst and Research Director for Gartner. Me in San Jose. They in Stamford, CT. Later I was a remote VP of Marketing for a software startup. Me in Santa Rosa, CA. They in Cincinnati, OH.

After relocating to Sacramento for a career change in financial services that didn't work out, I started CFP MediaGroup (now Octain) as a virtual company working with clients from the Philippines and Australia to Boston and the Silicon Valley. And managing remote teams equally as spread out.

It wasn't easy. We got fired a few times, mostly because communication or operations broke down. Which is why they are such a big part of what I'm sharing now. When remote work starts to spiral out of control the distance makes it much harder to course correct. So I hope you'll profit as I share my messes as well as my successes.

I was just a few months into my virtual company experiment when I got the call from an HR professional I'd met networking. Mary Kathryn Johnson was ready to leave the corporate world and strike out on her entrepreneurial journey to create an online maternity T-Shirt business for pregnant Moms-to-be, called MommyLoves.



The year was 2003 and Mary founded [MommyLoves](#), “after a fall when I was 8 months pregnant with my second child. With both legs in casts, I went through labor, delivery and caring for my newborn, toddler, husband and home. Three months later, when my legs were healed and released from casts, I could finally walk, and enjoy my freedom and independence again, and I realized that, “If I can do this, I can do ANYTHING!” MommyLoves was born 18 months later.”

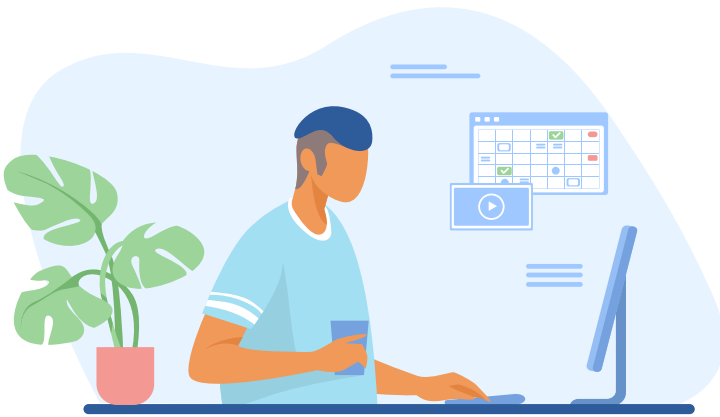
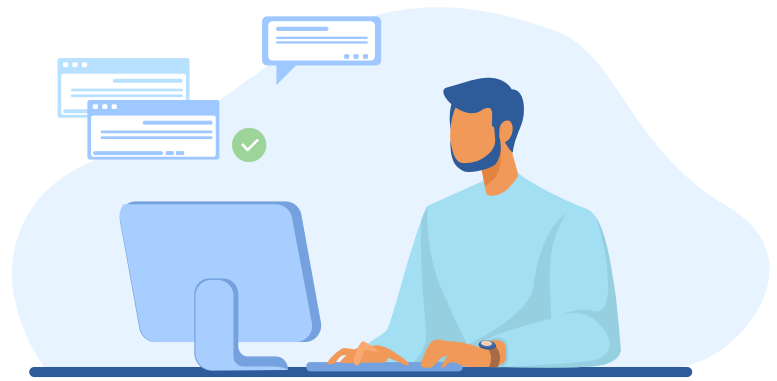
Ecommerce was in its infancy when we started so Mary and I learned together how to create the branding, messaging and marketing that turned MommyLoves into a global enterprise.

This experience started Mary on her journey as a serial entrepreneur to become the current CEO of [MessengerFunnels](#), a unique marketing solution utilizing Conversational Design and Strategy to drive automated and live customer conversations into conversions.

And I went on to found Octain, a virtual consulting company, working with business owners who need help implementing their growth goals. In today's environment that means we need to come together as business owners and Make Remote Work.

“ I wouldn't have my business if it weren't for Clare. Her insight, analysis and guidance have helped me grow the company at the right pace. She has taught me to play to my strengths to achieve huge results. ”

- Mary Kathryn Johnson,
CEO, MommyLoves



Part 1

Your People

Remote Work Changes Everything!

For business owners

- Where your people are located
- How productive they are
- Onboarding and training
- Virtual teamwork
- Managing the day to day



For remote workers

- Flexibility
- Time management
- Finding the right place
- Juggling responsibilities
- Staying focused and productive

Managing Remote Workers

As your workforce goes virtual, you will want to address every aspect of your remote workforce: recruiting, interviewing, onboarding and managing.

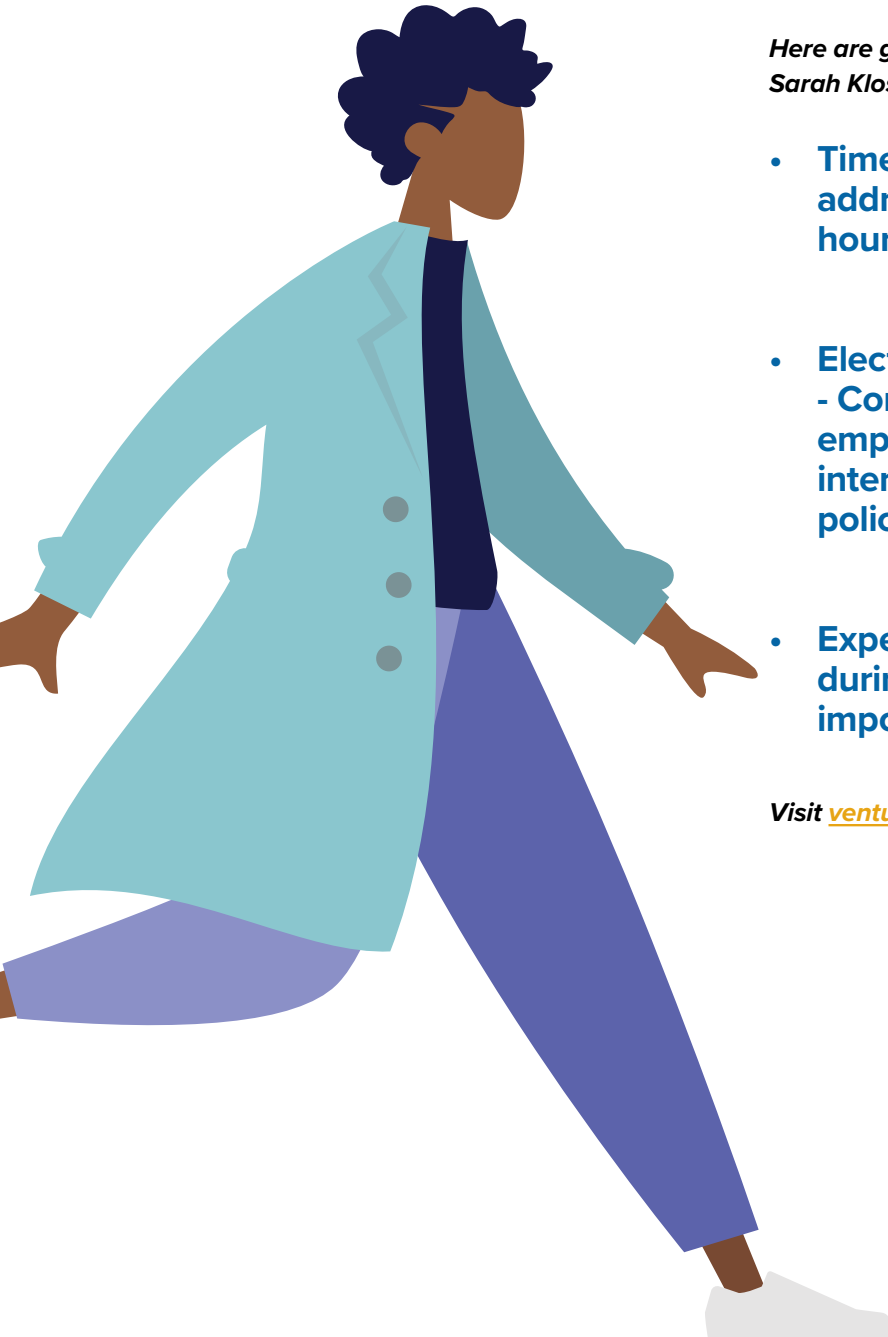
Patty Crabtree and Dana Borowka of Lighthouse Consulting provide some excellent advice in their blogpost, [Time to Develop a Remote Workforce Strategy](#).

- **Recruiting:** Broaden your talent pool by recruiting nationally instead of locally
- **Interviewing:** Start virtually to narrow your candidates and do a face to face interview with the one or two selected candidates
- **Onboarding:** invite the remote candidate in for training to build relationships and impart company culture
- **Managing:** Develop policies and practices that work effectively for workers in all locations
- **Set precise expectations for remote workers**
- **Consider making video conferencing mandatory for all workers**
- **Culture:** Ensure your company culture can transcend distances through effective communication of corporate values



Remote Work Policies

Prudent HR policies include guidelines from the business owner or management team for timekeeping, availability and equipment.



Here are guidelines offered by my colleague Sarah Klose of Venture HR.

- **Timekeeping requirements - Should address meal and rest periods for hourly staff.**
- **Electronic devices & connectivity - Consider offering a stipend for employees using their own devices and internet, adhering to acceptable use policies is very important.**
- **Expectations of availability - Flexibility during these times of uncertainty is important, but accountability is also key.**

Visit venturehr.com to learn more.

Roles and Responsibilities

“Would it surprise you to know that traditional management has designed jobs so that only 1% of the people can do the whole job well? The other 99% of us suffer through our WeakWork, which is slow, boring and miserable; and then zoom through our PeakWork, which is fast and fun. After we’re done with it, we have nothing left for the rest of the day, except WeakWork.” — Karla Nelson, PeopleCatalysts

That’s what the team at [People Catalysts](#) learned as they designed their peak performance system the WHO-DO Method.

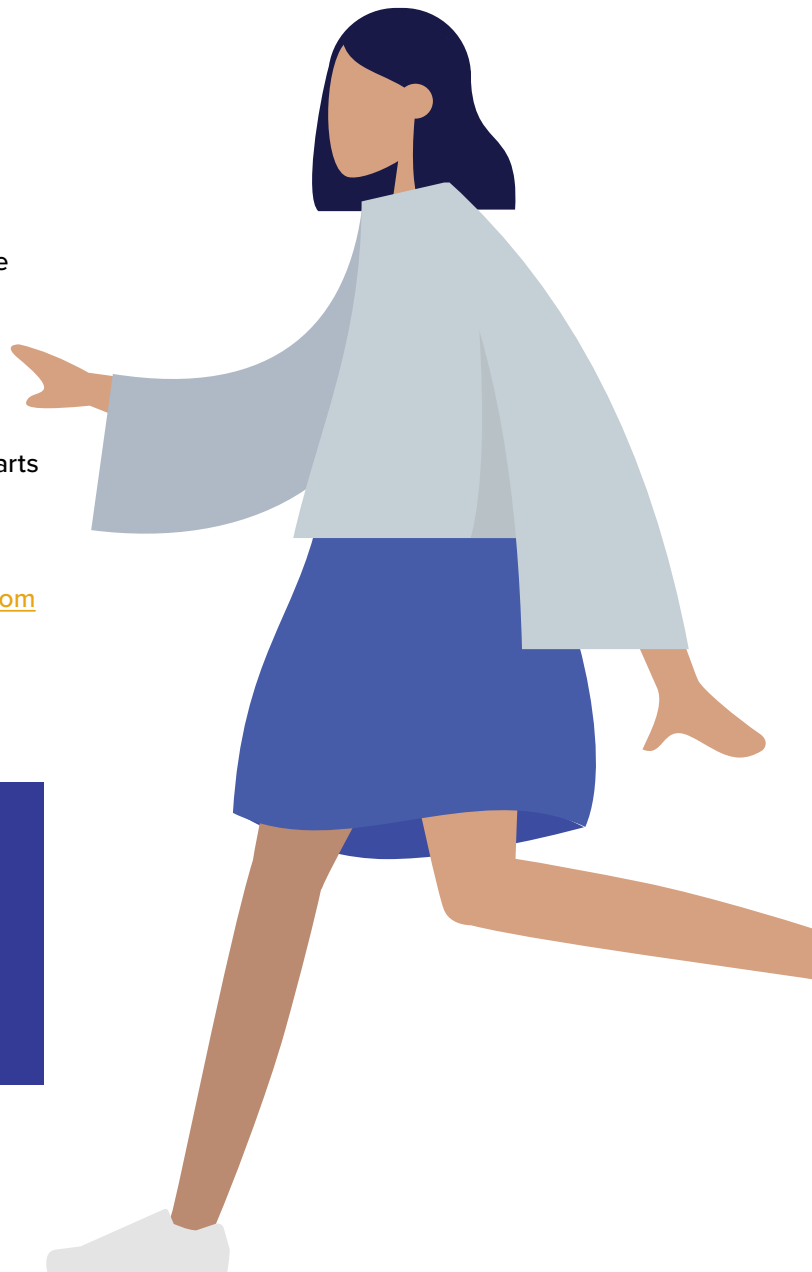
The right person in the right role is even more critical with a remote workforce than an on-premise one. So how do you know who is the best fit? Especially when you’re not seeing them every day to observe behavior and colleague interactions.

The WHO-DO assessment identifies your core nature of work. Are you a Mover, a Shaker, a Prover, or a Maker?

It’s not about your job. It’s about your core nature; what parts of the work do you love and do best?

What to know who to put in the remote roles you create when you Make Remote Work? Visit thepeoplecatalysts.com to learn more.

“Replace WeakWork with PeakWork when you have the right people in the right roles.”



Virtual Talent Pool



There is a lot of talent to support your business in the virtual world. For project work, sites like [Upwork](#), [Toptal](#), and [guru.com](#) provide virtual access to freelance software developers, designers, writers, product managers, and project managers. For high-end consulting options you have [B2B CFO](#) for finance and [Sales Xceleration](#) for sales teams.

If you can only do one thing, hire a virtual assistant. A virtual assistant is your remote lifeline, able to handle most administrative and office responsibilities. Some are specialists in specific industries and functions like telesales, social media or event planning.

I found a great resource in Judy Fritz of [VIP Services](#) in Bel Air, MD.

Collaboration: Virtual Teamwork

If you are used to sitting around the conference table with your team, it might surprise you to find that you can move all that creative energy online by investing in cloud collaboration tools.

As a foundation, you will want to choose a cloud-based office suite. The two main contenders are Microsoft 365 (formerly Office 365) and G-Suite for Business by Google. Both offer the key office applications for mail, calendar, document creation, presentations, file sharing and collaboration.

Here's a [detailed comparison](#) of the two suites plus MS teams.

Product	Pros	Cons	Price	Link
MS 365	Familiar to most office workers. New version (April 21, 2020) includes Teams.	Outlook clunky compared to Gmail	\$5 to \$20 per user/mo.	Product Details
MS Teams	Teams hub for teamwork in MS 365. Good if your business runs on MS 365.	Free version is limited to chat and file storage only.	Free	Product Details
G-Suite for Business	Fully integrated with all that is Google. Better for collaboration.	Less functionally than Word, Excel and PPT. Differences may confuse experienced MS users.	\$6 to \$25 per user/mo.	Product Details

Collaboration/Productivity Tools

These virtual collaboration/project management platforms all enable your team to create, manage and collaborate on programs, operations and tasks across your organization. Everyone has their favorites.

Here are my top picks.

Product	Pros	Cons	Price	Link
Trello	Strong, flexible Kanban app. Easy to use workflow and tracking.	Not fully functioning project manager or good if you don't like Kanban.	Free to \$20.83 per user/mo.	Product Details
Asana	Flexible, fast, modern design. Feature rich.	Can't switch between Task and Kanban project views after creation.	Free to \$24.99 per user/mo.	Product Details
Zoho Projects	Intuitive, feature rich interface, easy to use.	Expensive for small teams; not for solos.	\$150/year (6 years) to \$1,500 (enterprise)	Product Details
Basecamp	Flexible, feature rich. Better for collaboration than project management.	Limited reports.	\$99 per year for unlimited users.	Product Details
Slack	Easy, intuitive, messaging app, multiple integrations.	Multiple channels can get messy.	Free to \$12.50 per user/mo.	Product Details
Monday	Sophisticated and easy to use full function collaboration and project management. Idea management and built in apps a real plus.	Hyperlinks don't always carry over when spreadsheets are imported. Lack of CDN/ Bandwidth.	\$39 to \$79 per month for 5 users.	Product Details
Wrike	Good for teams of 20+, full function. Emphasis on project management. Custom versions for marketers and service teams.	Set up is daunting; longer learning curve than others. Lacks customizable templates and idea management.	Limited free version to \$24.80 per user/mo.	Product Details
Airtable	If you manage in Excel or Google sheets, Airtable is for you. Highly visual & flexible. Lots of project templates.	Cannot link databases.	Free to \$20 per user/mo.	Product Details
Whimsical	Specializes in flow charts, mind maps and wireframes. Great for creatives, visual projects. Good use support.	Limited to four functions and four boards in free version.	Free up to 4 boards. \$10-12 per user/mo.	Product Details

My current top favorite is Airtable because I like the similarity to MS Excel as a database with amazing features rich with capabilities for creation, collaboration and organization as well as app integration.

I'm also finding Whimsical an asset with flow charts, mind maps and wireframes. The **mind map on page 52** was created in Whimsical.

Virtual Communication

Virtual communication is an art - comfortable for some painful for others.

As a leader of a remote workforce, your toolbox should include:

- **Regular weekly staff meetings using videoconferencing**
- **Daily check-ins early morning, end of day with the management team**
- **Weekly free-flowing, unstructured brainstorming sessions with your managers to anticipate as well as react to shifts in the work environment and market. Critical!**
- **Collaboration software to keep everyone on same page and project flow**

- **Team calendars so everyone can see work projects their colleagues and peers are doing**
- **Virtual social times to support team comradery**

Virtual meeting hack: Ask first

You will not believe how much time is saved in telephone and text tag if you ask remote workers if they are available with a quick email or text before you ring in.

You Can't Overcommunicate

In the remote world there is no such thing as over communicating. Here's a guide that's worked for my virtual team.

AUDIENCE	APPROACH	FREQUENCY
Leadership Team	Video or live call	Daily
Key Customers	Live call	Weekly
Employees	Video message	Weekly
Service partners (supply chain)	Video and/or Email	Weekly
Dealers/Distributors	Video and Email. Post a letter if required by compliance.	Weekly
General customers	Email. Post a letter if required by compliance.	Weekly

Rethink Email

I can tell you, having run a virtual company since 2004, that relying on email as your central means of long-term communication will sow the seeds of confusion and disharmony among your team faster than almost any other approach.

My teammate Tim, a software engineer, loved to rely on email. Even if you were in the same office, two steps around the corner, you always got an email from Tim. And, Tim was opinionated, about everything, with a snarky email style. Our manager spent lots of time and lost productivity smoothing ruffled feathers in that office. Until one day our manager banned team email for a day and Tim had to come out of his office and talk with people. I won't say relationships changed overnight, but soon the snarky emails stopped and our team communication and comradery improved.



“ Replace email with message applications like Microsoft Teams or Slack. ”

Videoconferencing: Up Your Game

Videoconferencing is the new normal. Go beyond your laptop camera with these three steps.

Step 1: Choose Your Platform

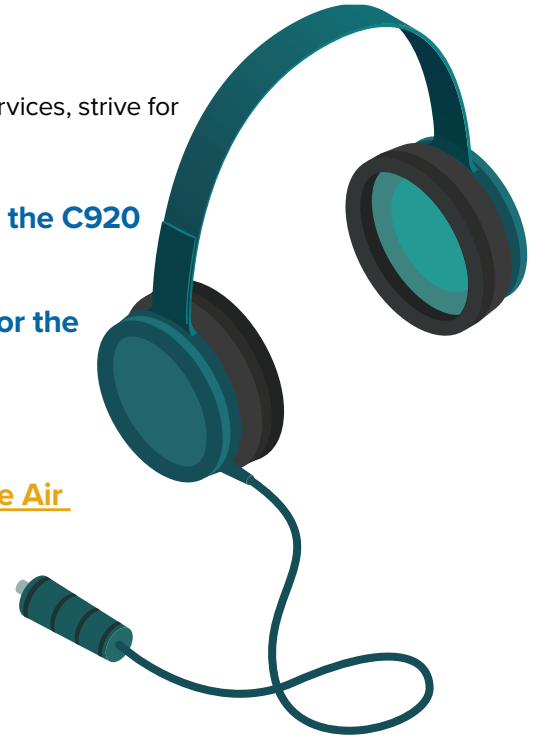
How to Geek has prepared [an excellent primer](#) on top choices:

Product	Capability	Features	Price	Website
Google Hangouts	Up to 10 unlimited talk in free version.	Supports simultaneous voice chat and allows participants to join a conference via email or a shareable link.	Free to \$25 per user/mo.	Product Details
Cisco WebX	Up to 100 unlimited talk. 200 enterprise	Robust free version. Conferences include support for features like screen sharing, video recording, and file sharing.	Free to \$26.95 per user/mo.	Product Details
Zoom – my personal favorite!	Up to 100 participants for 40 minutes.	One click set up integration with Google calendar. Robust conference features screen sharing, video recording, and file sharing.	Free to \$19.99 per user/mo.	Product Details
Skype	Up to 50 participants unlimited talk.	Better for talk than video. Requires sign up and app download to use. Being replaced by MS Teams for business.	Free.	Product Details
FreeConference	Up to five video participants and 1000 audio participants for an unlimited duration.	Good for small and one on one meetings. Limited features, i.e. screen share but no recording except premium.	Free to \$34.99 per user/mo.	Product Details
Jitsi	Unlimited participants and talk time.	Offers cloud hosted and self-hosted options. High quality video and audio, advanced video routing.	Free.	Product Details

Step 2: Set Up Your Equipment

When you are managing and working remotely, especially in professional services, strive for the best professional set up you can afford.

- **Good Webcam.** You can't go wrong with [Logitech](#). I use the C920 HD Pro.
- **Good headset.** I recommend the [Plantronics Focus UC](#) or the [Logitech Zone](#).
- **Microphone (for Webinars or Podcasts).** Try [Blue Yeti](#)
- **Lighting.** Hate that washed out look? Try the [Lume Cube Air Magnetic LED Light](#).
- **Virtual Background.**
 - **Hide the clutter.** Here's a [bundle of options](#) from Zoom.
 - **Get a good quality green screen.**
 - **Options for set ups.** Here's a [good tutorial](#) from Zoom.



Video hack:

Use your phone to record and send a quick video message to your team.

Remote worker hack:

Make video easy and productive for all your key employees especially sales and customer service by providing these tools to get the job done.

Step 3: Host Your Virtual Meeting

Virtual meetings are the mainstay of the Make Remote Work world. Here's an approach I've found effective for a quick 45-minute team meeting to keep the business moving forward.

Successful Virtual Meetings

Activity	Focus	Purpose	Time Frame
Check-in	Personal	Find out how people are doing; confirm their head is in the game	5 minutes
Status	Update	Confirm all programs, activities and projects are on or off track	5 minutes
Highlights	Good news/bad news on customers or production	Celebrate the good news; prioritize the bad news for the issues discussion	10 minutes
Issues	Resolve problems and/or opportunities	Identify, evaluate and resolve key issues	20 minutes
Actions	Assignment of To-Dos	Determine next steps	5 minutes

Team meetings are only one type of virtual meeting you will have. Everything from customer connections to sales meetings to performance reviews can be remote in the Make Remote Work world.

[Meetly](#) is a great resource for many types of remote meetings. It offers a variety of templates and remote team meeting ideas.



You Can Do

Consider:

Virtual communication is the remote worker’s lifeline, so the more personal and engaging you make it, the more successful your business will be. Consider,

1. How will we as a company and a team stay connected?
2. How can we integrate video successfully into our virtual office, customer service and sales arms?
3. What should we invest in – equipment, process, policies to make our communication and virtual meetings the best they can be?
4. How can we create and keep a culture of connection?
5. What can we do to foster virtual office comradery?

If you’d like to brainstorm ideas or get specific help in any of these areas, please visit our [Website](#) for more resources or [email me](#).



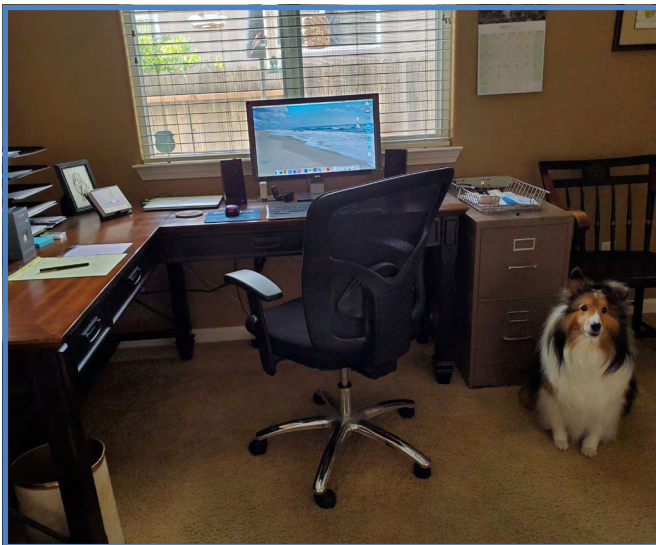
Your Remote Office

It's time to get to work at your remote office!

Do you pull out your favorite outfit and put on your make up or wander over to your desk in sweats? Working remotely has its share of challenges whether you are the CEO, owner, manager or administrator.

A dedicated place.

I've found that I'm most productive by dedicating a specific place in my home as my home office. Currently, my virtual office is set up in my spare bedroom that is exclusively used as an office. As I enter, I put on my work hat and when I leave the room, I am leaving the office. A web developer, apartment dweller friend has his virtual office set up in his master bedroom closet. Another associate has a nook in her kitchen reserved for work. Whatever the size and space of your home, setting and maintaining boundaries of a separate work place is a must! Here's mine with my work mate Toby.



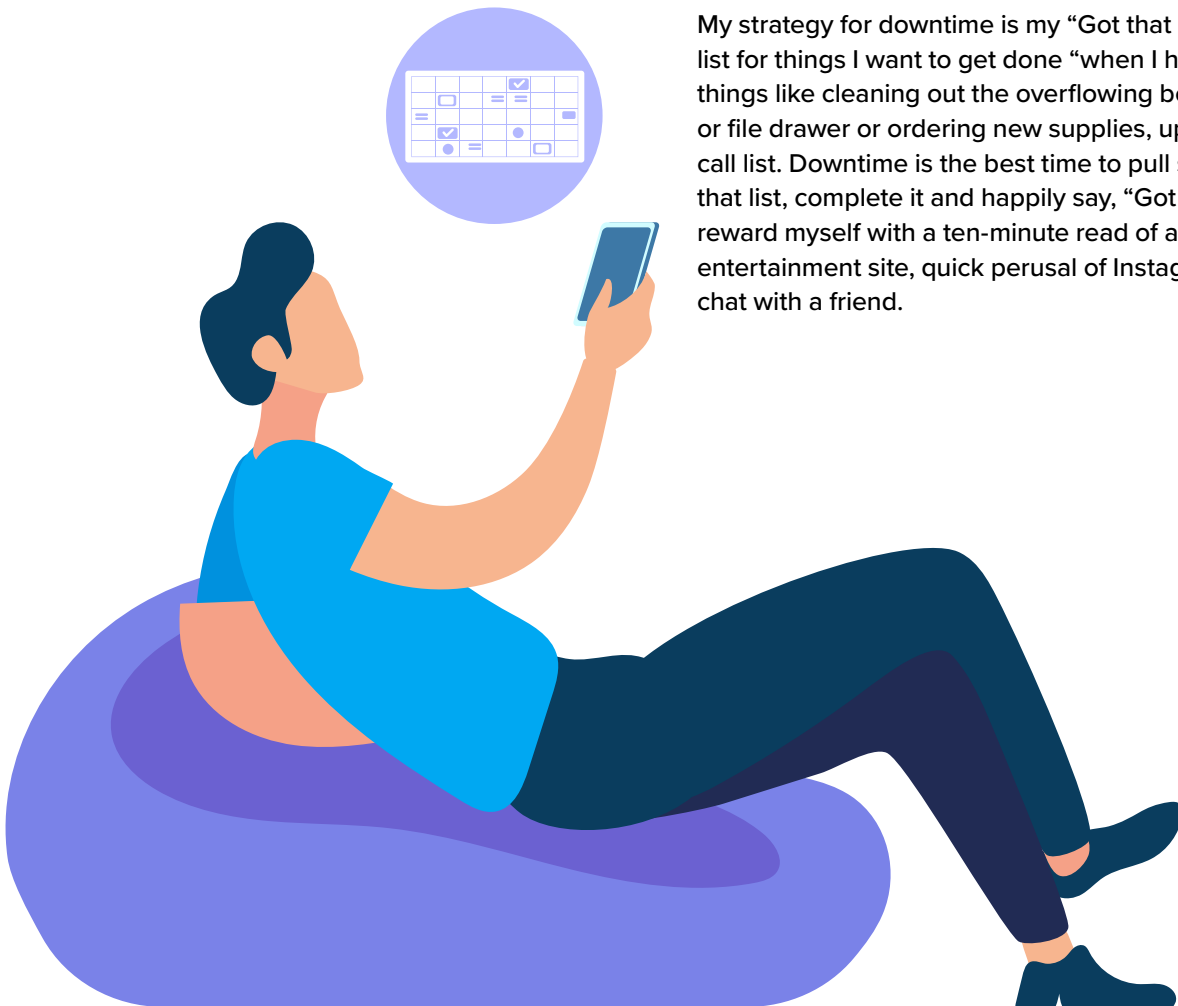
Regular work hours.

The discipline of setting regular hours and sticking to them has worked best for me. When I'm at work, I'm at work and ignore distractions like laundry and dirty dishes. It is also important to arrange for child care in or outside your home during your work hours. If you can, close the door or turn off the light at the end of your work day to eliminate the temptation to work 24/7.

Be prepared for downtime.

The workday ebbs and flows whether you are at the office or working remotely. Downtime at an outside office may mean visiting the lunch room or checking in with a colleague. You joke, you laugh, you get back to work in ten minutes. When you are remote, it's so easy to click on YouTube or Netflix and, BOOM! Before you know it an hour or two is gone.

My strategy for downtime is my "Got that Done!" list. It is the list for things I want to get done "when I have time." Exciting things like cleaning out the overflowing bookcase, disk drive or file drawer or ordering new supplies, updating my active call list. Downtime is the best time to pull something off that list, complete it and happily say, "Got that done." I then reward myself with a ten-minute read of a favorite news or entertainment site, quick perusal of Instagram or brief phone chat with a friend.



Keeping Focused and Productive at Home

Whether you are the business owner or employee, if you are new to working remotely, it can be a minefield of distraction.

I will never forget my first experience working remotely with a New York based publishing company-- I was in California. Boy, talk about freedom! When its 5 PM in New York, its only 2 PM California. On Fridays, okay sometimes Thursdays, I would jump in the car and head for Santa Cruz or Half Moon Bay. Probably not something I would recommend!

Take it from me. Although I've worked remotely for much of my career and have run a virtual company for the last 15 years, it's still a challenge.

Here's handful of my favorite productivity tools. They make life a whole lot easier.

Product	Pros	Cons	Price	Website
TimeCamp	Flexible, effective automatic time tracker runs in the background with manual option. Good integration with PM software and reporting.	Does not always assign correct task to project. Not intuitive to move uncategorized time to projects.	Free to \$7.50 per user/mo.	Product Details
Harvest	Strong time management with invoicing and expensing, team management & scheduling; good integrations.	More expensive than competitors. Very limited free version (1 person/2 projects)	\$12 per user/mo.	Product Details
TSheets	TSheets has applications for every business that wants to track employee hours against specific jobs.	The app can be a bit buggy and constant updates are annoying. No search function on desktop version.	\$8 per user/mo.	Product Details
Toggl	Easy to use, intuitive, feature-rich free version. Lots of templates.	No invoicing, scheduling, or other features not related specifically to time-tracking.	Free to \$18 per user/mo.	Product Details
Evernote	Great for notes and clipping from the Web. Easy to organize information. Lots of templates.	Restricted free version. Expensive. Costly storage.	Free to \$14.99 per user/mo. Business level requires min 2 users.	Product Details
Todoist	Great for list makers. Easy to use; intuitive organizing app, collaboration capabilities.	Some key features only available in the premium version.	Free to \$6 per user/mo.	Product Details

You Can Do

Moving from a physical to virtual office is a daunting task whenever you make the switch. Add in home schooling the kids and we are all scrambling. I hope this section on remote office operations helps smooth the way.

So, consider:

1. **Where at home will you be most productive?**
2. **What equipment and resources do you need to provide to your team to make them productive at home?**
3. **Investing in collaboration and productivity tools to help yourself and your employees work well together in harmony.**
4. **What's your best work at home schedule? Create it and stick to it.**
5. **How will you handle the inevitable downtime without losing creativity or wasting tons of time?**

If you'd like to brainstorm ideas or get specific help in any of these areas, please visit our [Website](#) for more resources or [email me](#).





Part 2

Your Process

Bring your Business to the Cloud

Profitability and sustainable growth in the remote economy demands a digital transformation to cloud-based operations. Those who do will gain operational efficiencies and cost reductions that will protect them through the ups and downs of any business environment. In short, you will be more than ready for the next recession or pandemic.

Reduce Costs. Improve Efficiencies.

- Reduce time and costs of doing business
- Improved quality
- Greater visibility – dashboards monitor everything
- More efficient task management
- Improved operational stability
- Greater customer satisfaction
- Cost optimization and no initial investment
- Scalability. Room to grow



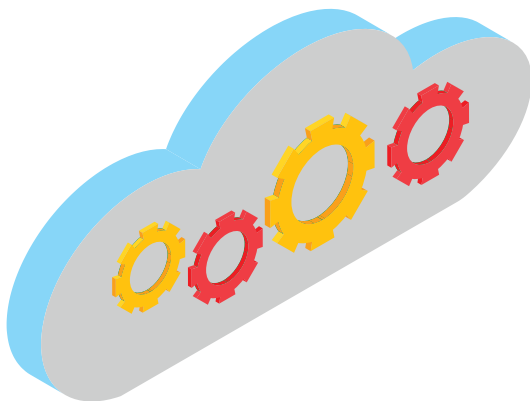
Technology Must Haves

Technology is available today to assist businesses in every industry to bring all or part of their operations to the cloud. We've got resource lists for:

- Data security
- Appointment booking
- Proposal development
- Manufacturing and enterprise (Ic) resource planning
- Order management
- Marketing automation
- Sales enablement
- Customer service



Professional service firms, especially consultants or anyone who trades time for dollars, can benefit exponentially from moving their operations to the cloud.



“Companies are only 12% of the way there in digital transformation.”

— Scott Hamilton, ENP

Data Security

Make Remote Work means reevaluating and restructuring your data security needs and requirements. Remote workers and remote offices require different security protocols, data storage and transmission capabilities.

Remote workers have a higher risk of cyberattack as they are dealing with your company data often from less secure home computers and networks.

Here is a checklist of the key areas to evaluate for secure remote worker capabilities:

- ✓ **Use strong passwords**
- ✓ **Set up two-factor authentication**
- ✓ **Use a VPN**
- ✓ **Set up firewalls**
- ✓ **Use an antivirus software**
- ✓ **Secure your home router**
- ✓ **Install updates regularly**
- ✓ **Back up your data**
- ✓ **Beware of remote desktop tools**
- ✓ **Look out for phishing emails and sites**
- ✓ **Watch out for work-from-home scams**

- ✓ **Use encrypted communications**
- ✓ **Lock your device**
- ✓ **Provide a secure data vault. Cloud storage from companies like Microsoft, Apple, Amazon, Dropbox and Box make secure data storage easier than ever.**



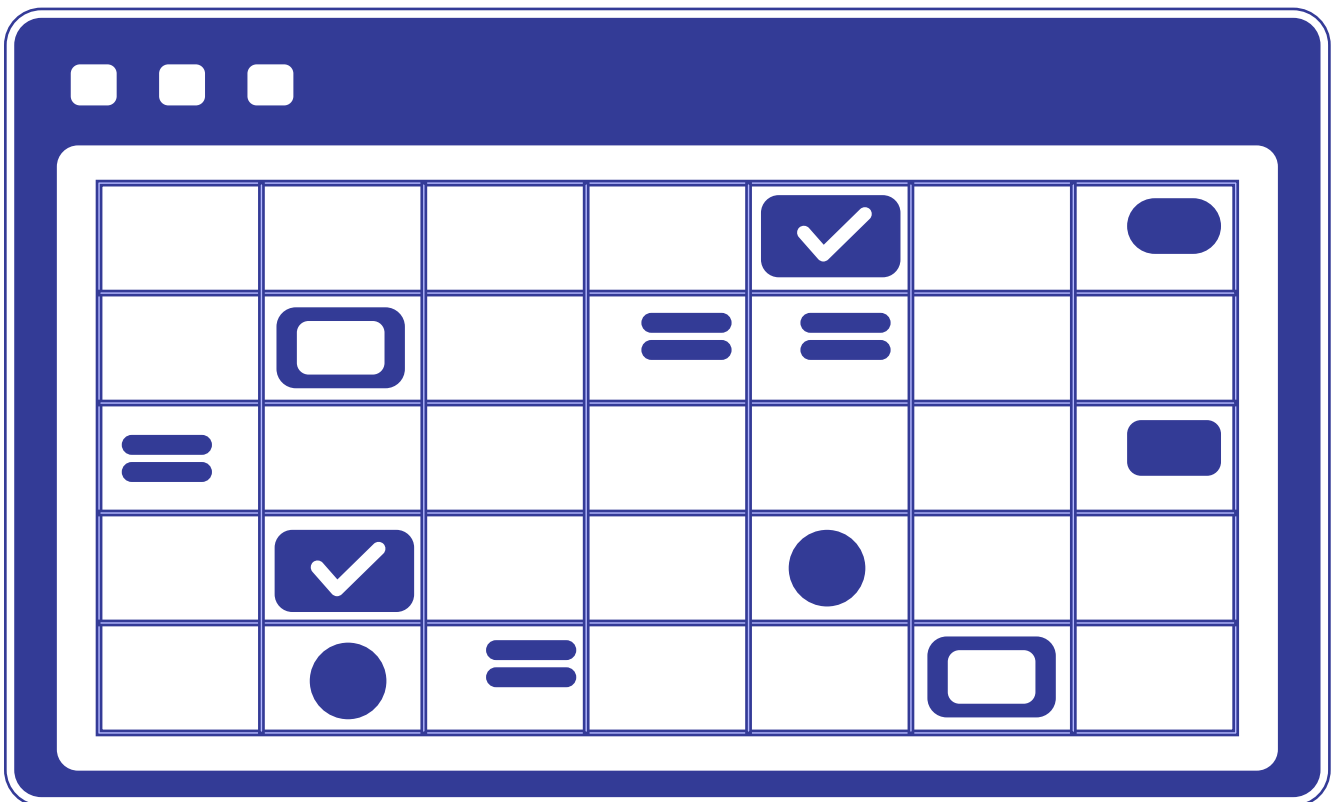
Get more detail on implementing these processes from Comparitech [here](#).

Appointment Booking

Bringing your appointment scheduling online frees you from the mundane. It gives customers flexibility and protects your time when you need it. These are worth a look.

Calendar software like [Calendly](#) and [calendarwiz](#) are great options for booking individual client appointments.

For a more robust appointment setting solution, virtual administrative support for class scheduling and training, try [TimeTap](#). TimeTap includes features for multiple locations, class scheduling, customized booking forms and automatic payments.



[Simplybook.me](#) is an online booking system for professional services companies that offers online booking, notifications, payments and marketing incentives like coupons, gift cards, memberships and product sales. In addition, SimplyBook.me offers listing in their professional services directory.

There is a variety of industry specific booking software out there too. Like [Legwork](#) for doctors and dentists, [Mindbody](#) for fitness classes and gyms or [Picktime](#) for hair salons.

Proposal Software

If your company submits proposals for jobs manually, especially in professional services, I strongly recommend investing in proposal software.

Not only does proposal software drastically cut the nonbillable time you spend developing your proposal, it monitors the prospect's response by tracking when, what and how they view what you sent them.

Imagine knowing when your prospect read your proposal instead of wondering and sending blind follow-ups.

Imagine knowing what pages caught their attention. Was it benefits? Features? Pricing? Knowing this better equips you to send a follow-up designed to appropriately respond to their specific interests.

That's exactly what proposal software like [PandaDoc](#), [Proposify](#) and [BidSketch](#) can do for you. Most offer a limited free version or trial.

[Here's a rundown](#) on the top 15 proposal software options from HubSpot.



Manufacturing & Enterprise Resource Planning (ERP)

DevOps

DevOps platforms support the entire software product lifecycle from planning to release, configuration and monitoring.

- ✓ Consider [GitLab](#), an open source web interface and source control platform based on Git for code collaboration and solid operations dashboard.
- ✓ Consider [GitHub](#) for automated workflow development, GitHub Packages and built-in CI/CD using GitHub Actions.

Automated Testing

- ✓ Consider software testing solutions [SmartBear](#), [Tricentis](#) or [Eggplant](#) (all leaders in Gartner's Magic Quadrant 2019).
- ✓ Consider complex manufacturing testing from companies like [Viewpoint Systems](#).

Manufacturing

- ✓ Manufacturing software platforms provide a range of enterprise resource planning (ERP) functions like inventory control, warehouse management, material requirements planning (MRP) and job shop floor control/manufacturing execution. Some support ecommerce and CRM.
- ✓ Consider manufacturing software systems [Fishbowl](#), [Oracle NetSuite](#) and [E2Shop System](#).

Distribution (Order management)

- ✓ Distribution software ranges from inventory and order management to software specific to distribution businesses.
- ✓ For an overall ERP solution that includes distribution, consider systems [Fishbowl](#), [Oracle NetSuite](#) and [Aquila](#).
- ✓ For general backend inventory management and order fulfillment, consider [Zoho Inventory](#) or [OrderHive](#).
- ✓ For manufacturing and franchise businesses, consider order management software like [Megaventory](#) that supports inventory management, order fulfillment, manufacturing tracking and data administration.

Order Management

Can a client or customer place an order online directly from your Website without having to contact sales? If not, why not? That's how today's customer prefers to buy.

Unless your product or service is highly technical or customized, you can Make Remote Work by enabling online purchasing through an ecommerce solution like [Shopify](#) or [WooCommerce](#).



Both offer all-in-one ecommerce solutions for small businesses and include managing orders, shipping, and payments. Shopify has extra features to support online marketing. WooCommerce has a module for subscription-based products and services.

For general backend inventory management and order fulfillment, I suggest [Zoho Inventory](#) or [OrderHive](#). Both provide all-in-one stock management, order fulfillment and inventory control systems that are easy to get up and running quickly.

For manufacturing and franchise businesses, consider order management software like [Megaventory](#) that supports inventory management, order fulfillment, manufacturing tracking and data administration.

Marketing Automation

Marketing automation software automates many baseline marketing functions that enable your team to excel at demand and lead generation. Options run from email marketing systems to sophisticated demand and lead generation and prospecting platforms.

Marketing automation is a critical success component of digital and social media marketing.

We'll focus on how to redesign your marketing engine to Make Remote Work on page 58. When you do, you'll find that marketing automation software is one of the essential tools.

Here's a review of my top six choices for marketing automation.

Product	Pros	Cons	Price	Website
ActiveCampaign	Robust suite of tools built around email marketing. Easy to design templates. Lots of custom features in professional package.	Number of options can be confusing. Price rises quickly with size of contact list.	\$9 to \$229 per month for 500 contacts to \$69 to \$359 per month for 5,000 contacts.	Product Details
Autopilot	Clever visually intuitive design canvas for email automation, lead nurturing and reporting.	No integrated CRM. Built around email marketing.	\$49 to \$249 per month.	Product Details
GetResponse – My favorite	Well-designed, easy to use platform for Automation, Landing Pages, Webinars and Email Marketing.	Stronger on design and email marketing than automation flows and CRM functionality.	\$15 to \$99 per month (1000 contacts)	Product Details
Hubspot	Granddaddy of inbound marketing platforms. Robust feature set focuses on lead capture and conversion.	Complexity; high learning curve; expensive – No real marketing automation in starter level.	\$40 to \$3,200 per month.	Product Details
Keap (formerly Infusionsoft)	One-stop shop email, marketing automation, CRM platform. Large breadth of features, flexibility.	Complex; longer learning curve than others.	\$79 to \$199 per month.	Product Details
Ontraport	Powerful email, marketing automation and CRM solution. Easy to setup. Great customer support.	Flexibility can lead to complexity and confusion.	\$79 to \$497 per month.	Product Details

Sales Enablement (CRM)

A robust customer relationship management (CRM) tool is one cloud sales enablement tool no business should be without. CRM software solutions are all about building customer relationships. They enable your sales team to connect with prospects and track their activity with your business from first connection to close of sale.

CRM systems include contact management, lead management, opportunity management, sales forecasting. Some integrate with marketing automation systems – theirs and others.

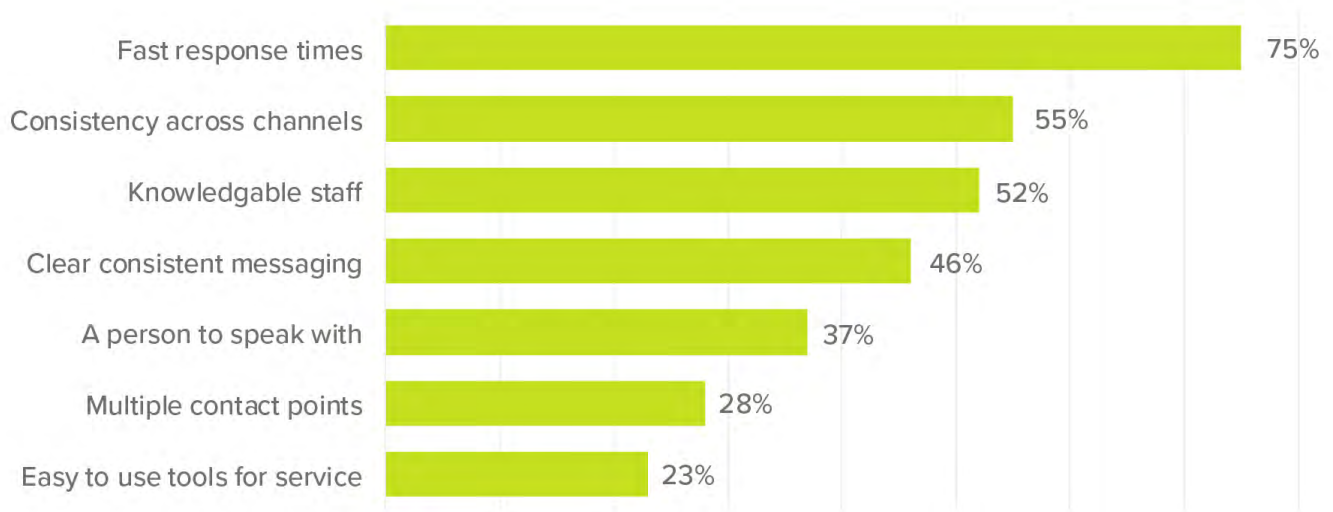
Here’s a rundown of my top picks for CRM.

Product	PROS	CONS	Pricing	Website
Salesforce Sales Cloud	The leader in CRM. Good opportunity management and extensive reporting. Integrates with sf marketing and service clouds.	Overkill in features and pricing for smaller businesses. Very limited Essentials starter offering.	\$25 to \$300 per user per month. \$75 professional edition most value for small businesses.	Product Details
Nutshell	Agile, easy to use CRM with fast learning curve. Includes all basic CRM functions.	Limited starter level sales automation. Weak mobile app. Steep price climb after starter level.	\$19 to \$35 per user per month.	Product Details
Copper	Copper is an easy-to-use CRM for small businesses that offers key CRM functions at a competitive price. Nice integration with G-suite.	Limited workflow automation. Cannot disburse leads automatically based on tracked conversion rates.	\$24 to \$119 per user per month.	Product Details
Pipedrive	CRM more focused on deal flow than contact management. Great lead tracking from multiple channels.	Maximum of 1000 names on an email send. Needs better multichannel marketing features.	\$15 to \$59 per user per month.	Product Details
Zoho CRM	Part of the extensive Zoho small business suite, comprehensive easy to use CRM solution. Customizable. Great analytics for tracking.	Older UI Interface. Features can be limited on lower priced tiers.	\$12 to \$100 per user per month.	Product Details

Customer Service

To Make Remote Work, you need to keep customers happy by delivering a seamless customer experience (CX) to every customer. They expect support through a range of channels and devices as quickly as possible. Customers now demand an Amazon-like experience from every supplier as [this data from SuperOffice shows](#).

Most Important Attribute of the Customer Experience



Phone and email support alone just don't cut it anymore. Any business owner can radically change their customer service experience with two online CX investments.

Customer Service: I've got an app for that

If the COVID-19 restrictions had occurred 10 years ago, daily life would be nearly impossible. But today we have apps for just about everything from online groceries to distance learning and Teledocs.

Why do an app now? To improve customer service. A well-designed app lets your customers place orders, check shipment status, log trouble tickets and more.

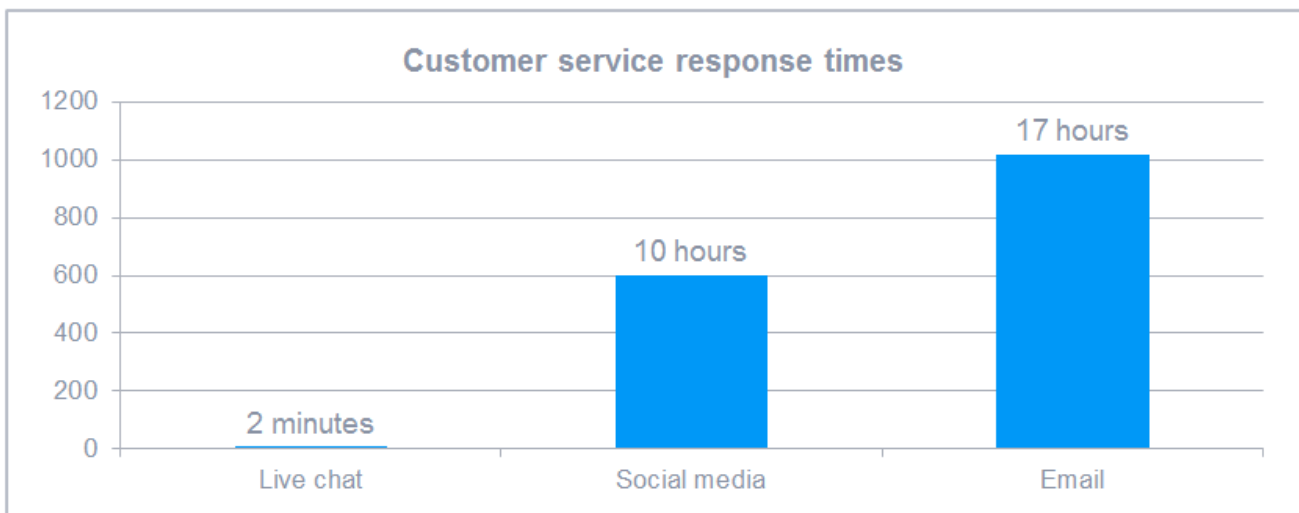
App developers are plentiful and global with a wide range of pricing and experience. Here are some key considerations for choosing an app developer.

Use this checklist as your interview guide and rank the candidate 1 to 5 stars on his/her ability to meet the needs of your project.

Capability	Expertise	Rating (1 to 5)
Design Experience - understands design and utility and how your customer interacts with apps.	Five to 10 years of experience	
Business Focus	Understands your business needs and how an app can best support those needs.	
Relationship Driven	Will work with you over the long term through extended product lifecycle.	
Client References	Your app developer should provide at least three recent client references.	
Price	Offers a competitive price. You should be willing to pay for what you need to support your customers over the long term.	

Customer Service: Discover Live Chat

A second Make Remote Work technology to invest in for customer service is live chat. Live chat changes your Website from a static information site to a live customer resource center. It [allows you to reduce response times](#) from hours to seconds.



Most importantly, it helps you increase sales. The [American Marketing Association](#) found that B2B companies that used live chat saw, on average, a 20% increase in conversions. It helps you reduce support costs.

The three live chat software solutions I'd recommend checking out are: [Live Chat](#), [ZenDesk](#) and [Olark](#).

You Can Do

Transitioning your business operations from manual or on-premise systems to cloud-based solutions can be daunting. It requires rethinking what and how you do your day to day operational projects and tasks.

Yet long term success in the remote economy requires rethinking and reinvention. And it's worth it.

When you transition to the cloud, you get operational efficiencies, flexibility and adaptability to the changing economic times – whatever comes down the road.

So, consider:

- 1. The costs and resources of your current solution vs. the costs and resources needed by a cloud solution.**
- 2. The availability and viability of a cloud solution for your business.**
- 3. What needs to be done within your organization to prepare for the transition.**
- 4. How you will develop your transition blueprint.**
- 5. How you will launch and rollout the new cloud solutions.**

If you'd like to brainstorm ideas or get specific help in any of these areas, please visit our [Website](#) for more resources or [email me](#).





Part 3

Your Products & Services

Serving the New Remote Economy

The new remote economy has stimulated the already growing trend of customer preference for online services, self-service support options and subscription purchasing methods.

73%

of consumers shop on more than one channel. ([Harvard Business Review](#))

56%

of every dollar spent in-store is influenced by digital transactions. ([Deloitte](#))

45%

of consumers believe retailers not delivering. ([McKinsey](#))

What does this mean for your business?

Rethinking. Retooling. Reinventing to embrace the remote economy.

Three Pillars of the Remote Economy



1. Your products & services online



2. Subscription pricing models



3. Community Marketing

Pillar 1: Your Products & Services Online

From concept to sales to service and support, just about every aspect of your product sales cycle can be done remotely using online systems, platforms and tools to make it easier and more fun for your customer to do business with you.



For those already immersed in ecommerce, digital and social media marketing, customer self-service and the like, this is an expansion of what you are already doing.

Still there may be areas of your product sales cycle that you haven't transitioned. Now is the time.

For example, you can turn your online shopping into an immersive experience like [Stitch Fix](#). Stitch Fix combines online shopping with expert advice from a fashion stylist. Your customers get the best of both worlds – online convenience and a personal shopping service.

Your Product Online Roadmap

Take these three steps to begin the process of discovering and deciding how to bring all or part of your existing business processes online.

Assess your strengths

Mind map your possibilities

Develop a blueprint

Assess your strengths

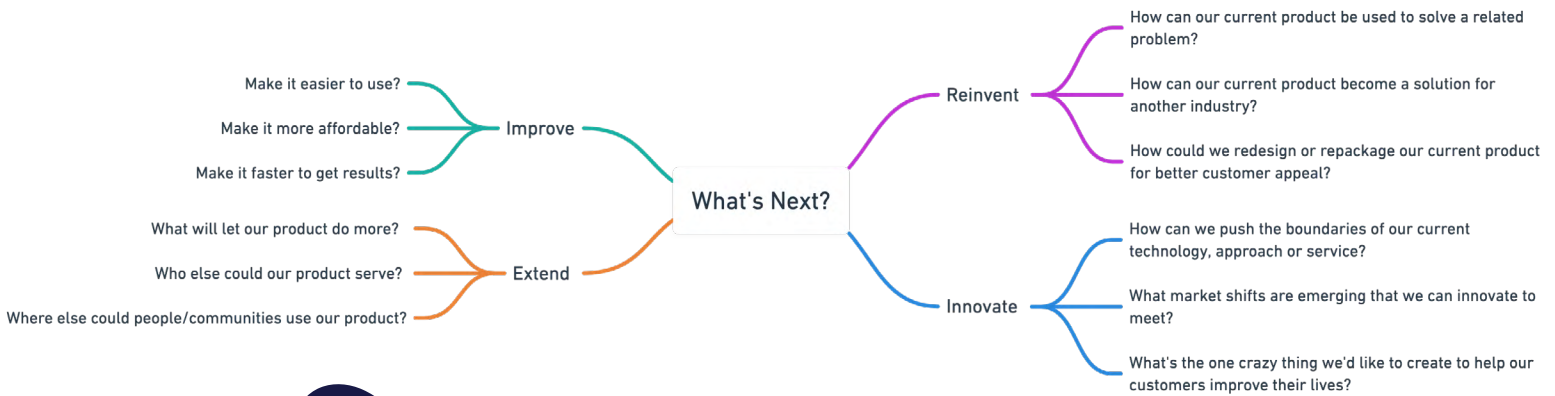
Use this worksheet to determine the competitive and market strengths of your product or services. Consider how you can use these strengths to compete better in the remote economy.

Product Strengths	Market Penetration	Competitive Advantage	Upsell Potential	New Customer Potential	New Market Potential
Why your product is purchased. What it is known for. EXAMPLES: Ease of Use; Customization; Personalized Service.	Based on this product strength, how many potential customers for this product have we successfully sold it to?	Does this feature help us compete more effectively or less effectively for new sales?	Does this strength enable us to sell more of what we have to existing customers? Volume, related products, etc.	How can this strength be used to appeal to more of the same kind of customer in other areas?	How can this strength be used to appeal to different segments or types of customers?

Map your possibilities

It's time to blue sky how you might rethink, reinvent and innovate your products and services for the remote economy. One of the best ways to do that is with a mind map. Here's mine to get you started. This mind map was created in [Whimsical](#).

For another resource consider an online collaborative whiteboard platform like [Miro](#).



Develop a Blueprint: Product Fuel Canvas

Use this Product Fuel Canvas as your remote economy blueprint, Our Product Fuel Canvas is one of the [six accelerator growth plans](#) offered by Octain to help Make Remote Work.

PRODUCT FUEL ACCELERATOR CANVAS			Octain Partners for Success & Profitability
Improvements	Competitive Advantage – How can we compete more effectively?	Market Penetration – Current Market Success	Action Steps
Extensions	Current Product Strengths	New Customer Potential	
		New Market Segment Potential	
Innovations	Upsell Potential – Higher volume, related products/services?		

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Our Product Fuel Canvas will help you discover new product/service opportunities to enhance or innovate new products to open new markets, attract new types of customers and drive profitability in the remote economy.

With Product Fuel Canvas, you will:

- Discover hidden competitive advantages
- Determine new ways to drive innovation
- Improve market penetration
- Identify upsell potential for current customers
- Unlock new market opportunities

Pillar 2: Subscription Pricing

Changing your pricing model from a product, project or hourly fee to an ongoing subscription model is the secret sales sauce of the remote economy.

Customers love it because it is easy and flexible. Your business loves it because it offers amazing benefits regardless of the size of your company, product or service.



Subscription pricing:

1. Increases the value of your business for sale or acquisition
2. Increases the lifetime value of your customers
3. Increases customer loyalty
4. Smooths the revenue rollercoaster cycle of project/fulfillment
5. Gives you long term access to your best customers – your community
6. Offers automatic payments = recurring revenue

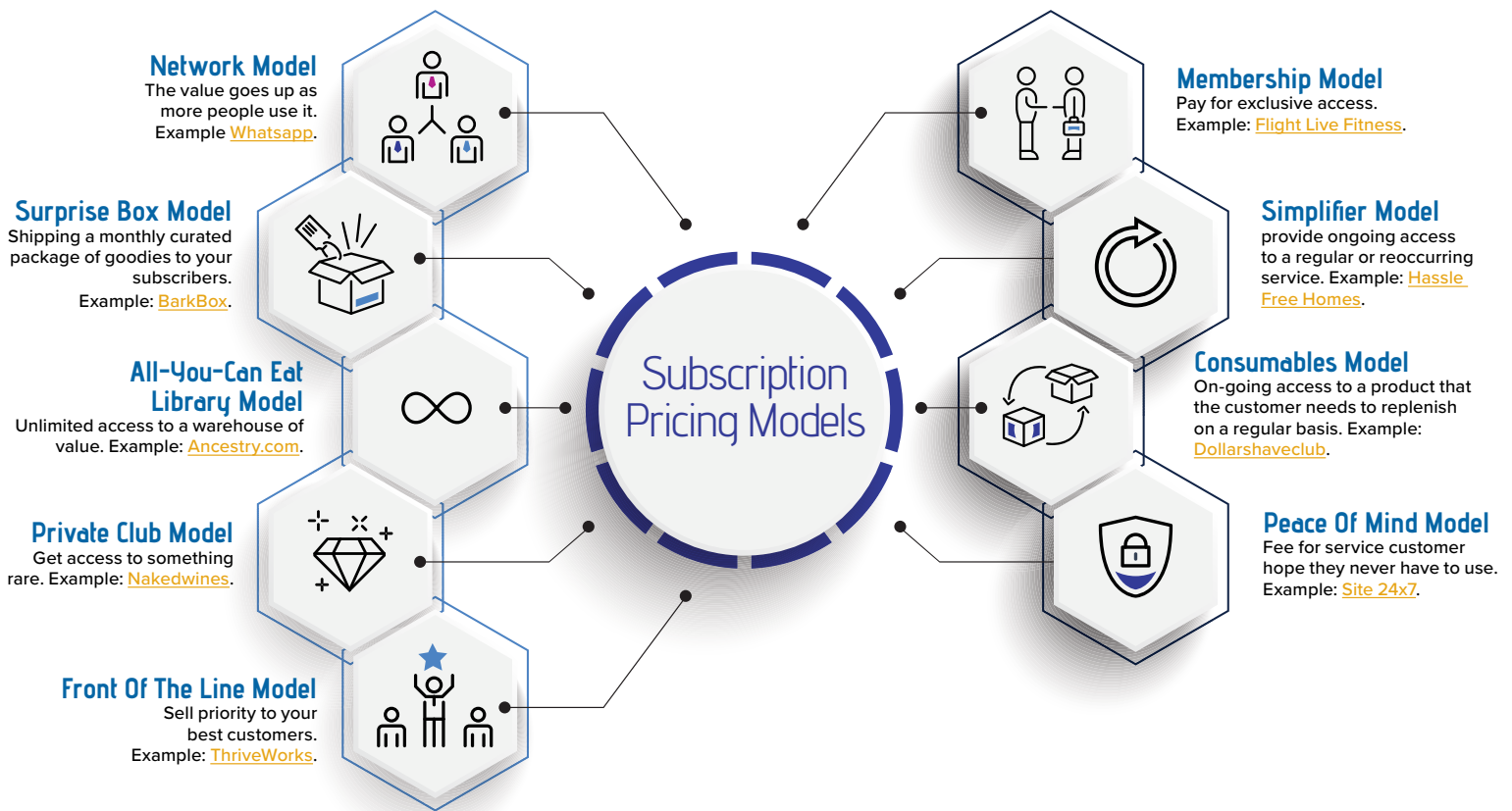
Best of all it makes your business more recession proof!

“Virtually every business . . . from a home contractor to a manufacturer can create at least some reoccurring revenue if it is willing to jettison the old way of doing things to pioneer a new business model.”

- John Warrillow,
The Automatic Customer

Building a Subscription Pricing Model

In his book [The Automatic Customer](#), John Warrillow outlines nine subscription pricing models.



Pillar 3: Community Marketing



Some of the world's strongest brands like Nike, Starbucks and Google were originally built through low-cost [community-based marketing](#).

Let your community do your marketing for you!

“Community marketing aligns perfectly with a subscription pricing model.”

Value of Community Marketing

You are going to have to redesign your marketing engine for the remote economy. Focusing on community marketing is the way to do it.

I believe the value of community marketing will expand exponentially with the growth of the remote economy. Your digital communities will be the primary place to build deep customer relationships, loyal customers and identify new customer needs.



Community Marketing has distinct advantages in a remote economy:

- ✓ **Connects existing customers with prospects globally**
- ✓ **Connects prospects with each other globally**
- ✓ **Increases customer satisfaction and loyalty**
- ✓ **Gives you instant customer feedback**
- ✓ **Enables product testing and market research**

*In the remote economy **communities will become your central marketing channel.***

Redesign your marketing engine

Here are four steps to redesign your marketing engine:

Produce Great Content



Focus on Community Engagement



Maximize Influencer Relationships



Develop a Blueprint

“Now is the perfect time to rethink and redesign the way you market from the ground up.”

Produce great content

I know what you're thinking: Yeah, right! How am I going to do that? I hear you! It's not easy. But it is worth it. Here's a quick cheat sheet that I've found useful. I hope it helps you too.

In your toolbox

Your content toolbox should include the following:

- ✓ **Database for storing ideas, articles and screen grabs. I recommend [Evernote](#) for this.**
- ✓ **Editorial calendar and/or content management template. [Airtable](#) has some great templates for this.**
- ✓ **Screen grabbing tool. I also use the Evernote Web Clipper for this. Other options are [Greenshot](#) or [PicPick](#) for Windows, [Skitch](#) (owned by Evernote) or [Monoapp](#) for Macs.**



Content creation action steps

Use this worksheet to determine the competitive and market strengths of your product or services. Consider how you can use these strengths to compete better in the remote economy.

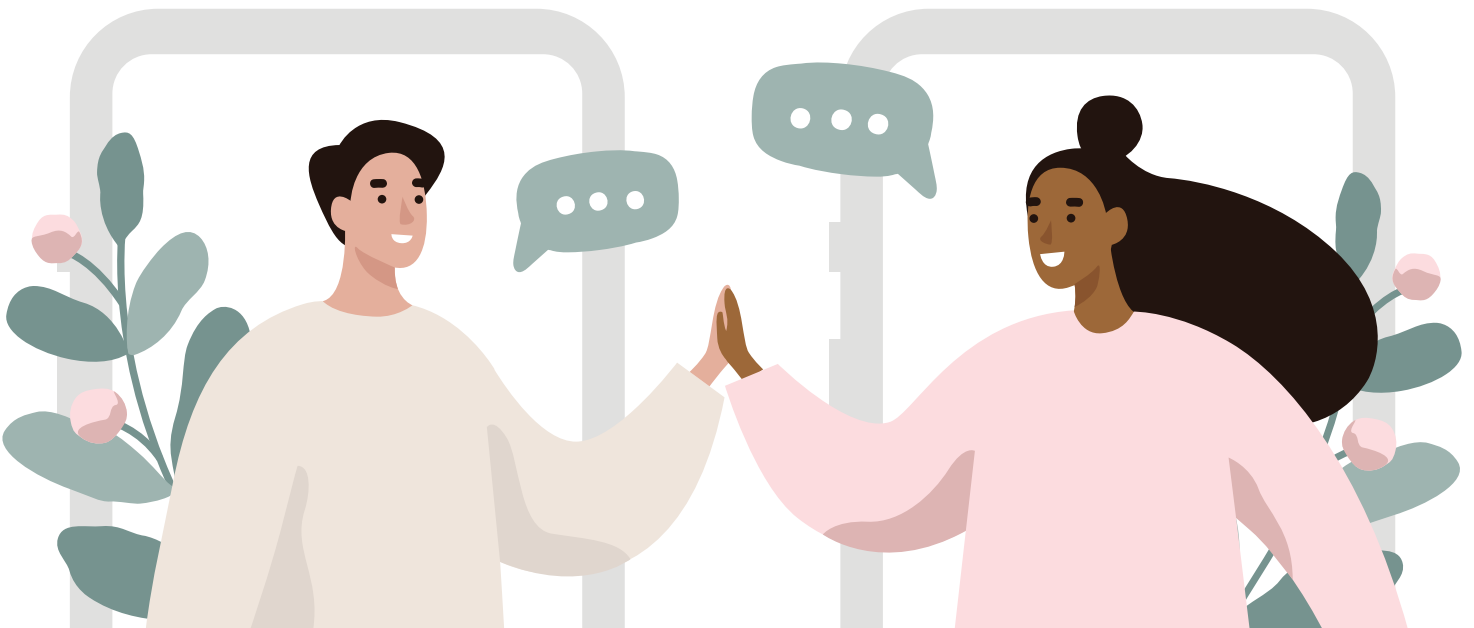
Content Goal	Hack
Be relevant to your community	See what your customers and peers are sharing and following on LinkedIn, Facebook and Twitter.
Be engaging	Reshare, retweet and comment at least three times weekly; more if possible.
Create original content	Screen grab posts, tweets and snippets for article ideas.
Start strong	Notice how today's movies and TV often start in the "middle?" Begin your post with the key point and a reason to keep reading.
Become a trusted resource	Answer questions and ask your community what they think.
Easy to read	Keep your language simple and your sentences short. Make it skimmable as much as readable.
Surprise them	Share what surprised you this week. Fun, inspiring and/or educational.
Tell stories	Case studies and customer successes are the obvious. What about the small events that happened to you, your peers or your family? I'll bet they are more interesting than you might think.
Make it actionable	Give your reader just one thing to do immediately after they have finished reading your post.
Give credit where credit is due	Source your material. Name the original author, use quotes, offer links back to the source.

Focus on community engagement

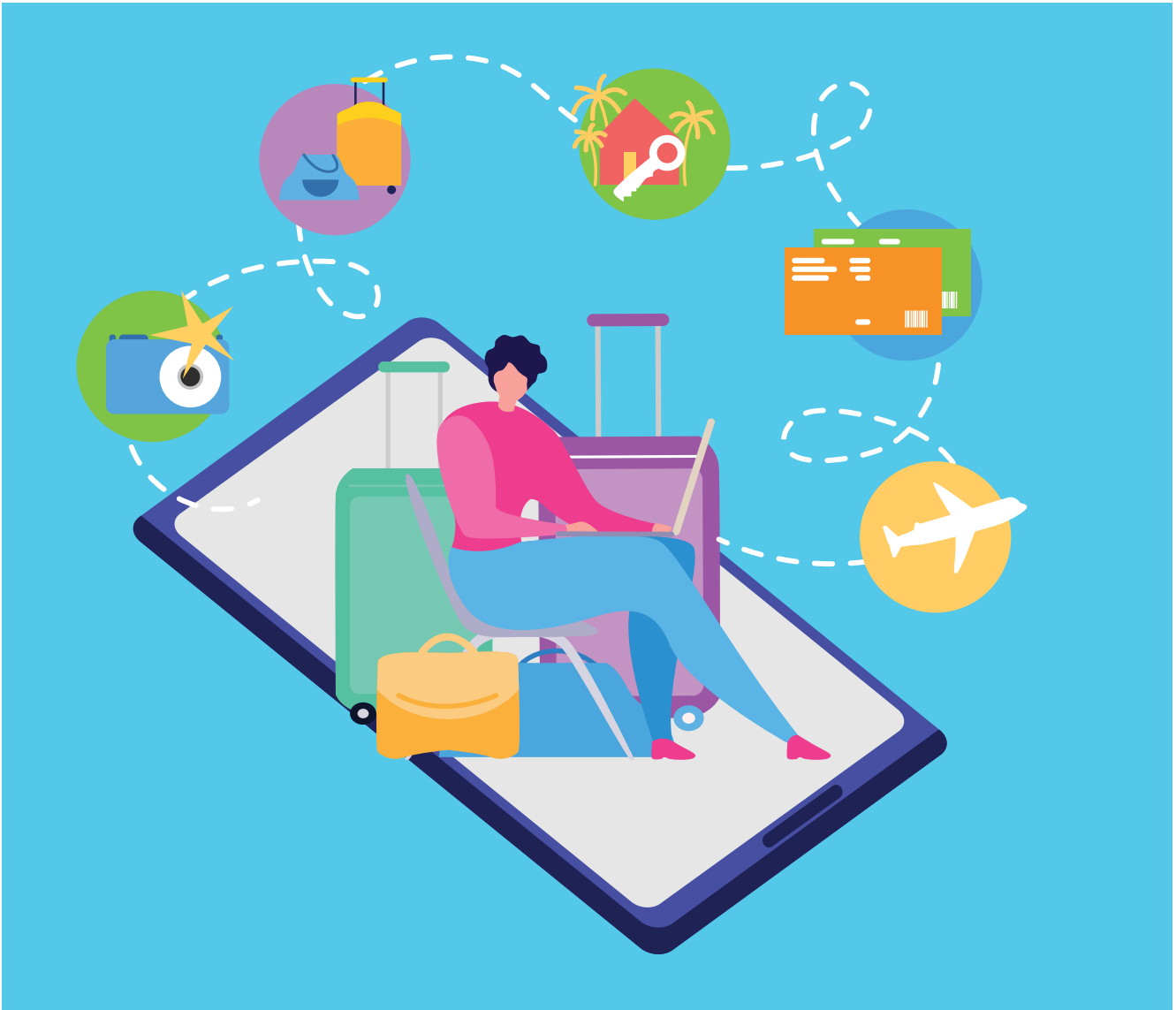
Digital customer engagement is a big enough topic for a book of its own. More like a library. Overwhelming if you're just getting started.

Three steps to community engagement

1. Turn your Website into a digital destination
2. Improve your customer self-service capabilities
3. Host virtual customer/partner events



Turn your Website into digital destination



Too many small business Websites are wasted space sitting out there doing little to drive business growth.

Success in the remote economy requires more from your Website. Turn it into a real digital destination for your customers and partners by making it a resource center.

Your Website as a resource

Create a password-protected section of your site just for customers and another one for supply chain or dealer-distributor partners.

Your resource center can include:

- Exclusive content to help them run their businesses better
- Exclusive self-service resources like a dedicated account rep
- External resources – Tools, resources, white papers, case studies
- This guide if you found it valuable
- Peer group connection opportunities like a Mastermind group

If you have a WordPress website, there are many plugins available as [you can see here](#).



Improve customer self-service

Today's customer wants to reach you through your Website or app. They want to find information, buy or support their product and get going. They want access to it 24/7.

You can provide the highest level of customer service by making your Website self-service.

Self-service options reduce your support costs. It allows you to learn about your customers as they interact with it.

FAQs and live chat and apps which we covered on page 44 are the best starter steps. If you've got those, add an active customer forum or community for instant conversations and peer resources.

One word of caution: *If you do decide to add a forum to your Website, be sure you have someone to continually monitor it for engagement and to make sure the conversation stays on point.*



Host virtual events



Consider hosting a virtual customer or channel partner forum video conference – a peer group mastermind session where customers can share their challenges and problem-solve together. A virtual get together is a gift to a business owner who feels isolated and under the gun. It positions you as a strong resource.

Four affordable small business options are: [BigMarker](#), [ClickMeeting](#), [Easywebinar](#), and the old reliable, if a bit dated, [GoToWebinar](#).

If you want to go big and comprehensive to make virtual events a central platform of your marketing strategy, consider [On24](#). This platform has the power to create virtual trade shows.

Maximize influencer relationships

Who in your peer group is always up to date on the latest best practices for your industry?

Those are the influencers who will make your community marketing efforts successful.

So, how do you find them and how do you get them to enthusiastically support your community?




1. **Start with LinkedIn prospecting! Identify thought leaders in your niche with a large following, lots of activity and a willingness to offer themselves as a resource.**
2. **Connect with them and look for ways to support the things they care about.**
3. **Become a resource to them before you ask them to become a resource to you.**
4. **Focus on long-term relationships.**
5. **If you are authentic in your interest and approach, they may ask you how they can support you.**
6. **Or if you ask, make sure your request is mutually beneficial.**
7. **You can pay for promotion. I don't recommend it as most people see through it.**
8. **You can work through an agency.**

For more on building influencer relationships, check out the [Influencer Marketing Hub](#).

Develop a Blueprint: Market Fuel Canvas

We have a resource for you! Use our Market Fuel Canvas as a blueprint to help you redesign your marketing engine for success in community marketing.

Our Market Fuel Canvas is one of our [six accelerator growth plans](#).

MARKET FUEL ACCELERATOR CANVAS			
Goals - Desired market/customer increase in revenue, volume, numbers.	Product/Services - What you are selling.	Marketing Strategies - Your game plan for reaching your goals.	Resources - The time, money, energy, talent and tools that you need to meet your target market goals.
Demand Generation - Specific strategies and actions to reach a large pool of prospects.	Pricing Model - How will you price your products and services?	Marketing Activities - The actions you will take to reach your goals.	
Lead Generation - Specific strategies and actions to connect with your best prospects.			
	Success Metrics - How will you measure ROI?		

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The Market Fuel Canvas creates a strategic framework for identifying new market expansion opportunities and gives you a clear set of directions to focus your marketing engine around community marketing.

With The Marketing Fuel Canvas you will:

- **Develop your business marketing goals**
- **Evaluate your products and services**
- **Build high performing profit models**
- **Determine your marketing strategies and activities**
- **Identify and allocate needed resources**

And [please contact me](#) to book a personal consult to help you redefine your marketing engine now so you are ready to embrace the new remote economy.

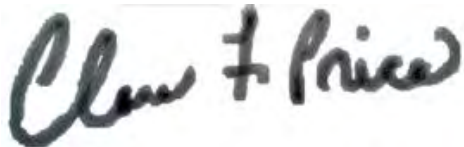
Embracing the Remote Economy

Remote work has been a staple of many industries for years. There is a booming gig economy out there already. Cloud computing has emerged as a reliable and effective alternative to manual and on-premise technologies. Customers increasingly prefer to buy online and by subscription.

The paradigm has shifted in favor of a new remote economic model for businesses from the office to the lab to the manufacturing factory floor.

I hope this Make Remote Work resource guide has given you some new ideas and insights into the value of embracing the remote economy. If you are ready to make the operational changes needed to ensure a practical and profitable remote work reality for business, [let's talk](#).

Thanks for reading!

A handwritten signature in black ink that reads "Clay F. Price". The signature is written in a cursive, slightly slanted style.

Acknowledgements

This is to and for all the entrepreneurs and business owners out there who are ready and eager to transform their business and accelerate their growth, regardless of the environment or circumstances.

This Make Work Remote resource guide would not be possible without the contributions of the following people. The wisdom and inspiration of my book coach, Henry DeVries, Indie Books International. Subject matter experts Sarah Klose of Venture HR, Karla Nelson of the People Catalysts, Patty Crabtree and Dana Borowka of Lighthouse Consulting.

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About the Author

Clare Price is CEO of Octain, a global strategic planning consultancy that helps small and mid-market companies grow to dominate their markets by Fueling the Speed of Business™.

Make Remote Work is the culmination of Clare's decades of experience as a remote employee, manager and business owner. She currently works with clients and manages consulting teams from California to Australia, the Philippines and Boston.

Clare got her start as a remote worker in the 1980s as a tech reporter for InformationWeek magazine, and later as a research director for Gartner. She helped launch Gartner's Internet Strategies Service, specializing in Internet infrastructure and early cloud computing for clients including Oracle, Cisco, IBM, Microsoft and Wells Fargo Bank.

Prior to launching CFP MediaGroup (now Octain), she was Vice President of Research for Demand Metric, a strategic marketing advisory service. At Demand Metric, she led the research analysis into cloud computing applications for marketing automation, social platforms, CPQ software, sales enablement, and cloud knowledge management.

Clare is the author of five marketing playbooks and the cyberthriller, Web of Betrayal. She has been a featured speaker for the American Marketing Association, Vistage, the California Society of Association Executives, Women in Technology International (WITI), eWomen Network and the U.C. Davis Graduate School of Management.



Clare is the proud dog Mom of two wonderful Shetland sheepdogs, Dan and Toby.

“ A perfect primer and how-to guide for any organization trying to figure out their remote working strategy and how to do it right. Packed with tools, advice and links, Clare takes the guesswork out of how to approach remote work, what to focus on, and how to help team members get comfortable with this new normal. Well done! ”

- Christine Crandell, President, [New Business Strategies](#)

“ Clare masterfully knows every aspect of a business' need to be able to smoothly and effectively work from home. She brings all the knowledge and tools for leaders to easily support their employees, making them productive, effective and efficient, but mostly engaged. This leads to an exceptional employee experience. This guide is a must read for managers and owners needing to navigate work from home. ”

- Steve Pappas, CMO and SVP - Panviva

“ I wouldn't have my business if it weren't for Clare. Her insight, analysis and guidance have helped me grow the company at the right pace. She has taught me to play to my strengths to achieve huge results. ”

- Mary Kathryn Johnson, CEO, MommyLoves