Beyond the Lockdown

How IBM is planning to enable safety and productivity in the workplace

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Even as the effects of the COVID-19 pandemic continue to varying degrees around the world, it is important to plan for a return to normal—albeit a different normal. Governments in some regions continue to relax stay-at-home orders. And among those that still maintain lockdowns, thoughts are turning to how best to manage the inevitable loosening of restrictions. The world is looking for a path to safely reopen business, educational institutions, and governments to get people safely and productively back to work.

Organizations around the world have experienced different sides of the pandemic. Some organizations have employee populations that, like IBM's, have been able to work from home relatively easily; others have had to shut down operations in whole or in part. Organizations need employees to be able to safely work on site. At IBM, we have had the privilege of supporting and enabling many of them in their time of need, while planning for what lies ahead for our clients and our own teams.

Learnings from IBM's own experience

At some point, workforces around the world will begin returning to work locations. And this will not be a simple flick of a switch from "off" to "on."

As a company with a sizable and widely distributed workforce, IBM has experienced first-hand that there is no one-size-fits-all approach. What we have learned while planning our return to a different normal may be helpful to others. Here, we share our clear set of principles and initial plans for wider application.

The clear set of principles we have defined and the initial plans we have mapped can be widely applied. With that in mind, this report is our attempt to share what we know from our own experience and the experiences of our clients, with the aim of expediting other's planning processes.

Many areas will continue to experience a high susceptibility to infection and new outbreaks. Communities will still struggle with limited testing availability to detect new infections. We cannot assume robust contact tracing will be used widely at this point.

Even so, many countries, states and communities will begin phased lifting of stay-at-home orders and start to reopen their economies, and we all need to be prepared now.

Here is what IBM is doing and why.

Our first step comprised three specific objectives:

– Evaluated locations that can be reopened to accommodate workers beyond employees performing essential work onsite that could not be performed remotely.

– Provided a safe workplace that applied public health authority guidelines, such as those from the Centers for Disease Control and Prevention, the World Health Organization, government directives, and our own policies and standards.

– Solidified policies and plans for a measured and phased return to work locations. This meant defining a series of waves of returned workers, as well as necessary exceptions and accommodations.

To go deeper, we developed several guiding principles to steer specific decisions.

Principles for returning to the workplace

1—Base decisions on five primary considerations:

– What guidance or criteria have been provided by local government?

– What does local clinical and population health data indicate? For example, has there been a sustained and significant deceleration in new cases as measured by the doubling rate (such as confirmed cases doubling in 15 days—or more or less frequently)?

– What are other local companies doing, especially those with whom you may be conducting business?

– What is the prevailing view of your workforce toward returning to work locations?

– How available are public transportation, schools, camps, daycare and other services essential to your workforce?

2—Base the return of employees in pre-defined waves using data-driven, evidence-based practices and policies.

– During Wave 1, plan on the vast majority of employees continuing to work from home.

– Consider carefully the criteria for the initial wave of employees to return, determining if they will experience substantial productivity or innovation benefits from being on site, even while wearing masks and social distancing.

– Permit employees in at-risk groups, or those requiring flexibility, to continue working from home.
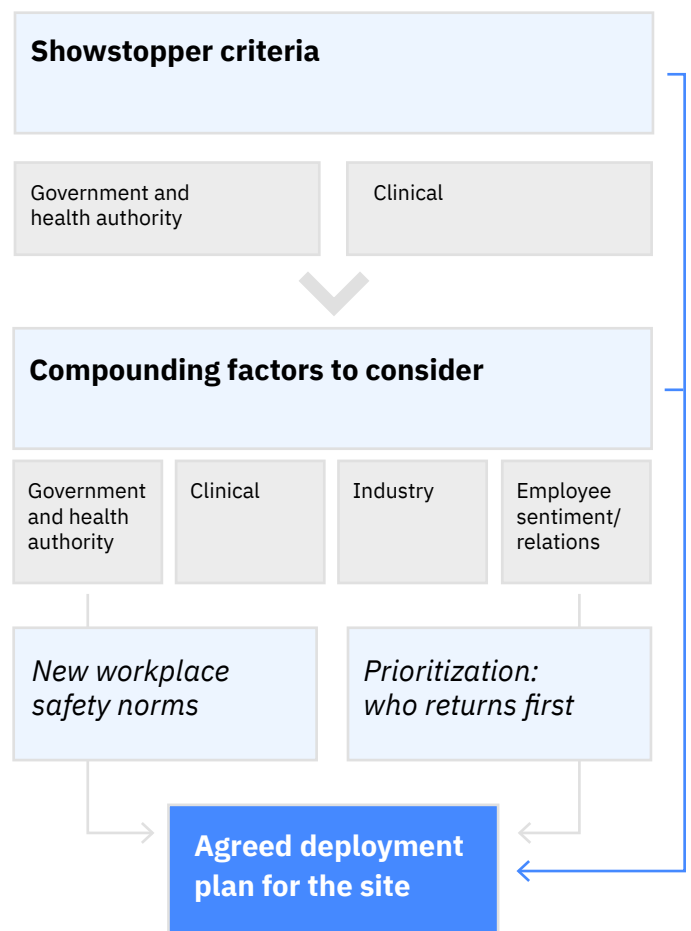
3—Carefully assess the market-specific health and policy landscape to determine future waves of returning employees.

With these principles in mind, we are sharing our plans for Wave 1 of the return to workplace.

Preparing for Wave 1

Our plans call for our first wave of workers to begin to return once COVID-19 cases decelerate, and when both public health authority guidelines and IBM global policies and standards are met. We anticipate Wave 1 beginning sometime in May or June. We used a simple decision tree to help bring the right elements together (see Figure 1).

Figure 1
Wave 1 site planning framework for the site

Showstopper criteria	
Government and health authority	Clinical

Compounding factors to consider			
Government and health authority	Clinical	Industry	Employee sentiment/ relations

New workplace safety norms *Prioritization: who returns first*

Agreed deployment plan for the site

We conducted extensive reviews to determine how to plan for employee and visitor safety on site. For example, many jurisdictions still require all employees and visitors to wear masks. So we had to answer these questions: "Should we provide masks? If so, do we have enough? How will we distribute them? What about masks for onsite visitors? How will we create an experience for visitors and employees that is safe but also not cumbersome?"

We know we'll have to adjust workstations and common areas to permit safe working distances. Building services will need to change: enhanced cleaning, increased air ventilation, and modified delivery of food services, among others.

We're assuming we'll need at least 50 percent more area per individual workstation in our new office layouts for social distancing. We're revising our protocols for the use of elevators, restrooms and site transportation. Some adjustments may be straightforward, such as encouraging the use of stairs in lieu of elevators.

Redesigned traffic flow will need to eliminate congestion at site entrances and natural queuing points. In cafeterias, we'll provide barriers between servers or cashiers and customers, touchless transactions, and floor markers to delineate distancing.

We have identified some of the new workplace norms we'll have to establish. For example, all sites will require on-site health screenings for clients and partners that enter the campus or building, and daily health pre-certifications for our employees, which includes at-home self-screening and temperature checks prior to going to an IBM or client site.

These new workplace norms will also include a change in how our employees collaborate and work. We'll look to limit the frequency of in-person meetings, including new requirements for number of on-site participants. Our client briefing centers, auditoriums, training rooms and large conference rooms will likely remain closed for a period of time as we find new ways to accomplish our business objectives.

We'll continue our support—technology-wise and culturally—for most of our employees who will continue to work from home, and we have established clear guidelines for deciding who is eligible to return, and when (see Figure 2).

Figure 2
Expected scenarios for return to workplace by wave

Wave 0	Wave 1	Wave 2	Wave 3
– *Situation:* Onset of COVID-19 cases – Stay-at-home orders	– *Situation:* COVID-19 cases decelerate, flattening the curve – Many jurisdictions require masks – Stay-at-home orders begin to lift with phased economic reopening	– *Situation:* Scaling of testing/ contact tracing – Advances in treatment	– *Situation:* Continued improvement in testing/ tracing/treatment/ healthcare capacity
– Only IBM employees performing essential work onsite if cannot be performed remotely – 95% of IBM employees working from home – Availability of medical benefits enhancement and additional paid time off – Increasingly stringent travel restrictions – March – April	– IBM protocols: masks required and 2 meters/6 feet of social distancing – Work from home continues for most. IBMers who should experience substantial productivity or innovation benefits on site return. Client-facing professionals return aligned with client readiness to receive them on site – Very stringent travel restrictions – May – June TBD, local market dependent	– IBM protocols: masks required and 2 meters/6 feet social distancing – Work from home continues for most. Additional IBMers return. Client-facing professionals return aligned with client readiness to receive them on site – Travel restrictions vary based on local conditions – Timing: dependent upon assessment of local conditions	– IBM protocols: masks required (as needed) and 2 meters/6 feet social distancing – Most IBMers return. Some work on site regularly. Others remain remote, only returning as needed – Client-facing professionals return aligned with client readiness to receive them on site – Increased flexibility for travel – Timing: dependent upon assessment of local conditions

Preparing for Waves 2 and 3

Advances in COVID-19 treatment, together with a significant scaling of testing and contact tracing, will permit a second wave of employees to return to work locations. For employees who return, we expect the work environment will be quite similar to Wave 1—masks still required, for example, and social distancing observed; travel restrictions in place based on local conditions. Client-facing employees may be able to resume in-person client interaction based on whether or not the client is ready to receive them. We anticipate, though, that most employees will continue to work from home during this phase.

Significant improvements in testing, tracing, treatment, and healthcare facility capacity will enable most employees to return in a third wave to work on site. Some will be able to work on site regularly, others on an as-needed basis. Our travel restrictions will likely reflect increased flexibility, and most of our client-facing professionals will return to client work, assuming the clients are prepared to receive them. Returning employees in this wave will encounter the same health and safety protections as previous waves, and many of the new working norms will have become standard procedure. Some employees will continue to work remotely depending on personal and business needs.

Even as we plan for successive waves of getting back to normal, awareness needs to be maintained that in some areas, a sudden virus resurgence could require that we pause, or even reverse, the return of employees to the workplace. We've built our plans and policies to accommodate that contingency.

Here are the checklists we're using for our Wave 1 return. They may help your organization as you think through and plan the return of your workforce to what lies ahead.

Readiness checklist: Wave 1

Step 1: Is your site ready to open?

Government and health authority		Comments
Critical showstoppers		
Has the local, regional, state, and/or national government canceled mandatory "stay home" orders previously in effect? If so, when?	☐ Yes ☐ No	
Has the government allowed businesses to reopen their premises? Is it only a subset or all businesses?	☐ Yes ☐ No	
Additional questions		
Does your location have a dependency on public transportation? If so, are transportation restrictions still in effect, such as public transportation (trains, subways, buses)? If so, what temporary actions need to be deployed to get IBMers to their work location, if any?	☐ Yes ☐ No	
Are local schools, camps, daycares or childcare closed or impacted? If so, what temporary actions need to be deployed to enable IBMers to be able to return to their work location, if any?	☐ Yes ☐ No	
Does the local, regional, state, and/or national government or health authority require advance approval of "return to work" by location?	☐ Yes ☐ No	
Does the local, regional, state, and/or national government or health authority require health screening or PPE (e.g. temperature checks, masks)?	☐ Yes ☐ No	
Does IBM have any reporting requirements to the local, regional, state, and/or national government or health authority?	☐ Yes ☐ No	

Clinical		
Doubling rate: Are the number of confirmed cases doubling in 15 days or more (i.e., every 15 days or less frequently)?	☐ Yes ☐ No	
Fatality: Are the number of new daily deaths below 100 in the relevant area (e.g., in a small country, or in a state/province within a larger country)?	☐ Yes ☐ No	

Readiness checklist: Wave 1

Step 1 (continued): Is your site ready to open?

Industry		Comments
Are other local companies (including clients) in the region returning to work? If so, who?	☐ Yes ☐ No	
Are IBM's clients served by the region/site requesting in-person meetings?	☐ Yes ☐ No	
Are other local companies that are co-located with IBM offices returning to work? If so, are the building and co-located companies following appropriate safety norms in common areas (e.g., elevators)?	☐ Yes ☐ No	

Employee sentiment and employee relations		
What has the impact of COVID-19 been to the local IBM population/community?		
What is employee sentiment about continuing to work from home vs return to the workplace? e.g. are employees expressing a need to get back to the workplace, or concerns about doing so (e.g., health concerns, physical safety concerns, family care concerns)?		
In collaboration with Labor Relations, have you ensured that the return to work plans and standards are handled as required by local labor processes (e.g. with employee representatives, works councils)? Provide more detail.	☐ Yes ☐ No	
Does your location have a dependency on public transportation? If so, are transportation restrictions still in effect, such as public transportation (trains, subways, buses)? What government or local actions can be deployed to ensure employees are and feel safe? (Input from CMT, Government & Regulatory Affairs) Provide more detail.	☐ Yes ☐ No	
Are the hours of operation for local, essential merchants (e.g. grocery stores, pharmacies) back to normal or will IBMers have difficulty fulfilling their needs if they return to work? (Input from CMT, Government & Regulatory Affairs) Provide more detail.	☐ Yes ☐ No	

Readiness checklist: Wave 1

Step 2: What do you need to keep IBMers safe at your site?

Health screening standards		Comments
Has the site deployed at-home health self-screening to returning employees?	☐ Yes ☐ No	
If on-site screening is required, does site have trained screeners, thermometers and mask supply for screeners?	☐ Yes ☐ No	
Has a visitor screening process been set up?	☐ Yes ☐ No	
Does site have 30 days of masks available upfront and access to ongoing 30-day supply?	☐ Yes ☐ No	

Social distancing measures *Have social distancing guidelines for site have been adhered to, including the following?*		
Agile desks	☐ Yes ☐ No	
Meeting rooms	☐ Yes ☐ No	
Collaborative seating	☐ Yes ☐ No	
Common areas	☐ Yes ☐ No	

Building services *Have building services been upgraded, including:*		
Facility management	☐ Yes ☐ No	
Cleaning services	☐ Yes ☐ No	
Hygiene	☐ Yes ☐ No	
Food safety	☐ Yes ☐ No	
Ventilation	☐ Yes ☐ No	
Transport	☐ Yes ☐ No	

Communications and change management		
Are communication plans and roll out to employees on new health and safety protocols completed?	☐ Yes ☐ No	

Readiness checklist: Wave 1

Step 3: Have you determined who needs to be returning in Wave 1?

IBMers returning to IBM Site		Comments
Will the individual/teams be materially more effective collaborating in the workplace while maintaining social distancing and PPE norms or are teams better off collaborating on WebEx/ Mural/Slack/Box?	☐ Yes ☐ No	
Why is this the case (e.g. access to IT infrastructure, equipment, network capacity)? How is it measured (e.g. productivity)?		
How important is the increase in effectiveness from returning to the workplace on 2Q outcomes (e.g. revenue, signings)? Why does the individual/ team need to return now?		
What is the business impact if the individual/ team continues to work virtually?		

IBMers returning to client sites		
Have IBM account leaders reviewed the IBM Health/Safety protocols with their client counterpart(s)?	☐ Yes ☐ No	
Has the need/benefit for IBMers to return to the client site been assessed, using the questions outlined in the practical guide?	☐ Yes ☐ No	
Has an agreement been made with the client on what data and information IBM will/will not share with clients?	☐ Yes ☐ No	
Has an agreement been made with the client on permitting IBM employees to opt out of returning to the client site in case of individual health considerations?	☐ Yes ☐ No	