

Pharmaceuticals & Medical Products Practice

# How US companies are planning for a safe return to the workplace

In a new survey of 100 executives, respondents expect most employees to be working on-site by December. To do so, they are implementing a range of interventions that could transform how people work.



**As COVID-19 lockdowns lift** across the United States and worldwide, company leaders are considering the monumental challenge of how to restart and then run their businesses while ensuring the safety and well-being of their employees and, where applicable, customers.

To gain insight into the potential steps US companies are taking, we surveyed 100 executives at firms across the country and across industries. These executives expect 80 percent of their workforce, on average, to be back on-site by September and that 88 percent will be back by December (Exhibit 1). The results also suggest that for these companies, working from home won't be the next normal for all. Four in ten respondents say that permanent remote working is possible for less than one-quarter of their desk employees, while two-thirds say that no field employees will be able to work from home indefinitely.

As part of their guidance for reopening businesses,<sup>1</sup> the Centers for Disease Control and Prevention (CDC) recommends that companies follow a hierarchy of controls (starting with eliminating the virus from their workplaces) to protect on-site

## Our methodology

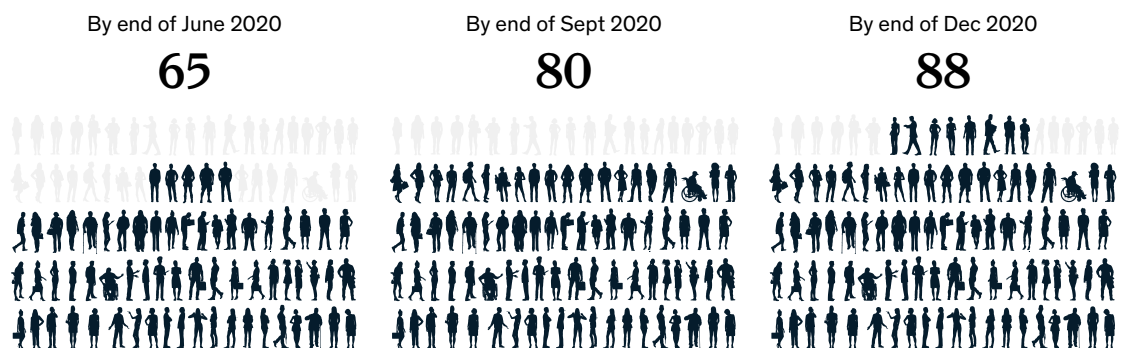
From May 8 to May 13, 2020, McKinsey surveyed executives from 100 US-based companies on 31 different measures that their companies have implemented, or plan to implement, as part of their return-to-work protocols during COVID-19.

The companies represented in this survey vary in size, and their employees are primarily US-based: 94 of the respondents work for companies with at least half of their workforce inside the United States. The sample includes 18 different industries, the largest ones being professional services, retail (food, grocery, and/or pharma), retail (discretionary), food and accommodation, construction, and manufacturing. Sixty-nine of the respondents reported that they work in industries considered "essential" by the government.

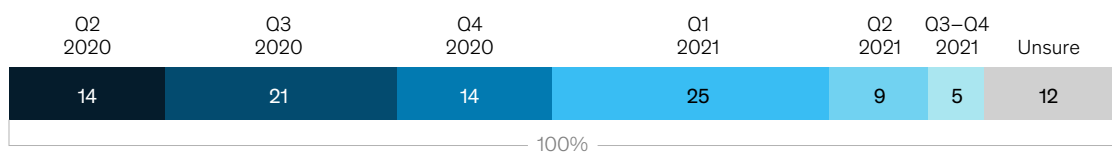
Exhibit 1

## Respondents expect 80 percent of their employees to return to the workplace by September.

Average share of employees expected to return to workplaces in 2020, %



Expected time frame for 100% of employees to return to workplaces, % of respondents (n = 100)



<sup>1</sup> "Interim Guidance for Businesses and Employers Responding to Coronavirus Disease 2019 (COVID-19), May 2020," Centers for Disease Control and Prevention, [cdc.gov](https://www.cdc.gov).

workers.<sup>2</sup> Executives were asked about the following four types of interventions that correspond with the CDC's guidance: limiting direct and indirect person-to-person contact, identifying and isolating potentially infectious people, increasing hygiene protocols, and using personal protective equipment, or PPE (Exhibit 2).<sup>3</sup> The results suggest that most companies surveyed have, or will, implement many of the measures tested in the survey, as well as a range of change-management practices that reinforce the behaviors that can help keep employees safe at their workplaces. In fact, many respondents' companies are applying measures across the four interventions. Seventy-six percent of those surveyed say they have implemented or planned for at least one measure from each of the four categories.

interventions. Most commonly, their companies have limited larger gatherings or switched meetings to videoconferences (VCs), restricted the entry of nonemployees to work sites, and reduced the number of employees on-site (Exhibit 3).

While physical changes to limit contact are less common than policy ones, majorities of respondents report plans to change their workstations, food-service areas, and other physical infrastructure (Exhibit 4). The most common physical change respondents' companies have already made is separating workstations, which 50 percent of respondents report doing and an additional 34 percent say they plan to. Changes that require the installation of new technology—replacing handles with touch-free devices, for example—are reported less often.

### Limiting direct and indirect person-to-person contact

Efforts to limit interpersonal contact have involved redefining where work can happen (for example, by enabling remote work), minimizing opportunities for interaction, and making physical changes to work spaces. According to the survey, most respondents are limiting or plan to limit contact through a mix of both policy-based and physical

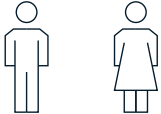



### Identifying and isolating potentially infectious people

Respondents' companies are focusing on a range of measures to try to identify and isolate employees who present COVID-19 symptoms or have tested positive, based on CDC guidelines. Of the measures these companies use or plan to use, checking employee temperatures is the most common;

Exhibit 2

## The survey tested four types of interventions in support of a safe return.

### Interventions and their most common measures reported by respondents

			
<b>Limiting person-to-person contact</b>	<b>Identifying and isolating potentially infectious people</b>	<b>Increasing hygiene protocols</b>	<b>Using protective personal equipment (PPE)</b>
<ul style="list-style-type: none"> <li>● Limiting large gatherings or switching to video-conference meetings</li> <li>● Reducing number of employees on-site</li> <li>● Physical separation of workstations</li> </ul>	<ul style="list-style-type: none"> <li>● Temperature checks for employees</li> <li>● Contact tracing for infected employees</li> <li>● At-home health surveys</li> </ul>	<ul style="list-style-type: none"> <li>● Reducing operating hours to facilitate cleaning</li> <li>● Requiring sanitization breaks for employees</li> <li>● Antiviral/disinfectant fogging</li> </ul>	<ul style="list-style-type: none"> <li>● Employees' use of face masks</li> <li>● Customers' use of face masks</li> <li>● Employees' use of other PPE</li> </ul>

<sup>2</sup> "Hierarchy of Controls," Centers for Disease Control and Prevention, cdc.gov.

<sup>3</sup> For more information on potential safety protocols in the workplace, see Suzanne Rivera, Kate Robu, Virginia Simmons, and Shubham Singhal, "Reopening safely: Sample practices from essential businesses," May 2020, McKinsey.com.

Exhibit 3

**A majority of respondents' companies are already limiting gatherings, reducing the number of employees on-site, and restricting entry for nonemployees.**

**New working practices to limit contact during COVID-19 pandemic, % of respondents (n = 100)**

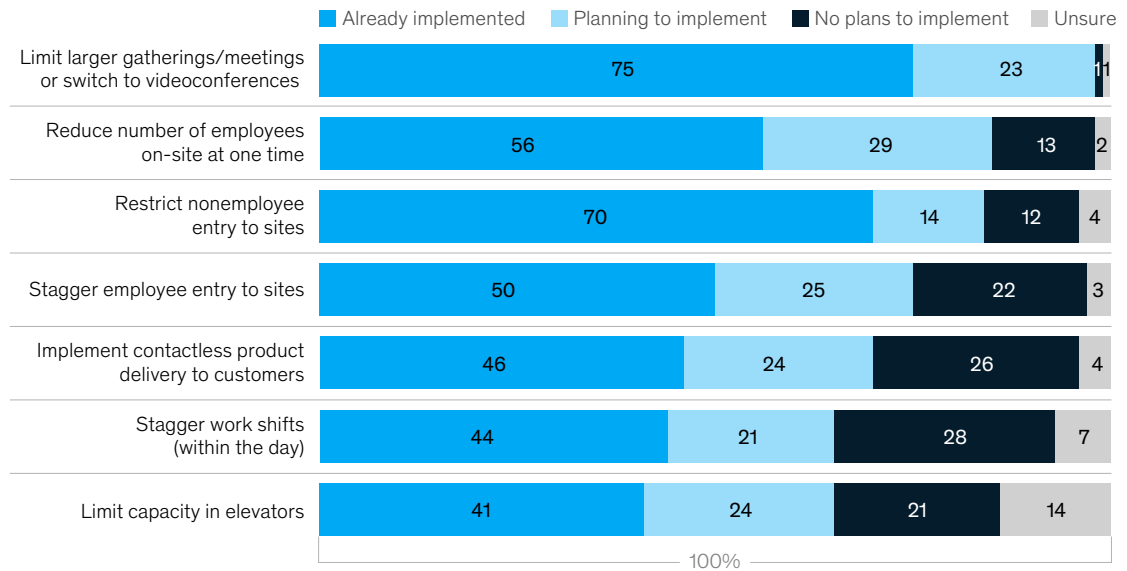
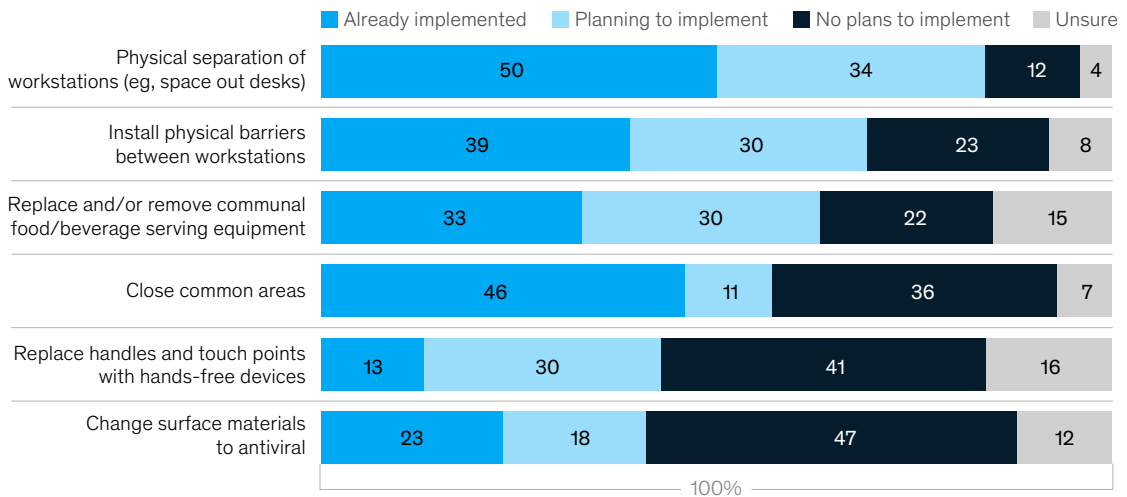


Exhibit 4

**Respondents' companies have made or plan to make several physical changes to their facilities, most commonly by separating workstations.**

**New working practices to limit contact during COVID-19 pandemic, % of respondents (n = 100)**



nearly three-quarters say their companies already check employee temperatures or plan to (Exhibit 5). Temperature checks for customers are less common, with 40 percent of respondents saying they already perform these checks or plan to do so. And while regular diagnostic testing is less common than other measures, 35 percent say their companies test employees or plan to do so.

Of the respondents whose companies are checking temperatures or plan to, more than half say checks would be mandatory for all employees (Exhibit 6). Seventy-eight percent of those respondents say they plan to check temperatures daily, while an additional 9 percent plan to do so two or more times per day.

According to respondents, companies' approaches to contact tracing (that is, tracing and monitoring contacts of employees who have tested positive for COVID-19) are not as consistent.<sup>4</sup> Of the 46 respondents whose companies are planning to contact trace, 17 say they have or will create a dedicated team to identify employees who have been in contact with an employee who has a confirmed case. Sixteen respondents report

planning for some degree of contact tracing within the company, but in an ad hoc or decentralized way.<sup>5</sup>

### Increasing hygiene protocols

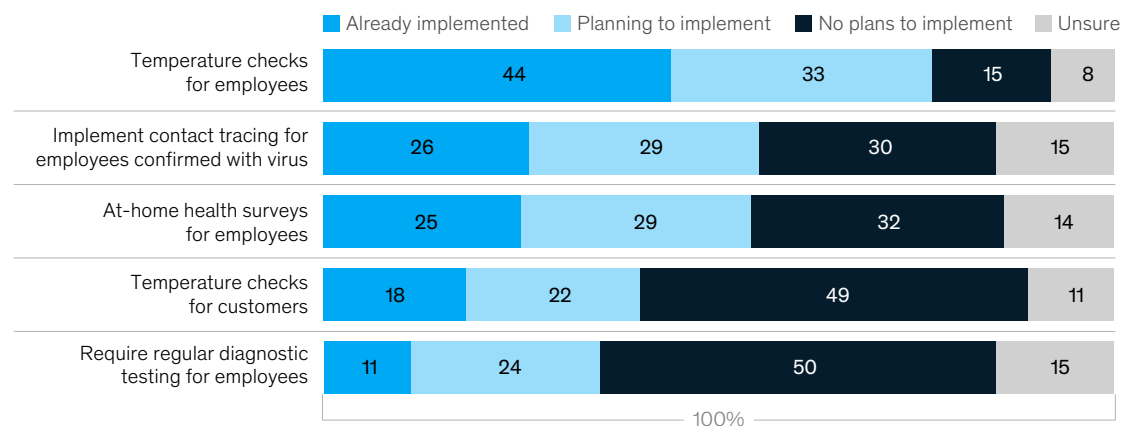
Hygiene measures that companies could implement to decrease the risk of COVID-19 transmission include new or modified practices for cleaning and disinfection, changes to encourage personal hygiene (for example, frequent hand washing), and engineering controls, such as modifications to ventilation systems. The survey focused on hygiene measures that would be more costly or disruptive to implement—antiviral fogging in high-occupancy areas, for instance—rather than more straightforward or widespread changes, such as increased cleaning.<sup>6</sup> That said, no more than 51 percent of the executives surveyed report that their companies have made or plan to make each of these changes, which would significantly affect operations or require new equipment.

The two most commonly reported measures are reducing operating hours to facilitate cleaning and requiring sanitization breaks for employees, each of which has been implemented by 32 percent of

Exhibit 5

## Seventy-seven percent of respondents' companies check employees' temperatures or plan to, while 40 percent say the same of temperature checks of customers.

**New working practices to identify and isolate potentially infected individuals, % of respondents (n = 100)**



<sup>4</sup> Molly Bode, Matt Craven, Markus Leopoldseder, Paul Rutten, and Matt Wilson, "Contact tracing for COVID-19: New considerations for its practical application," May 2020, McKinsey.com.

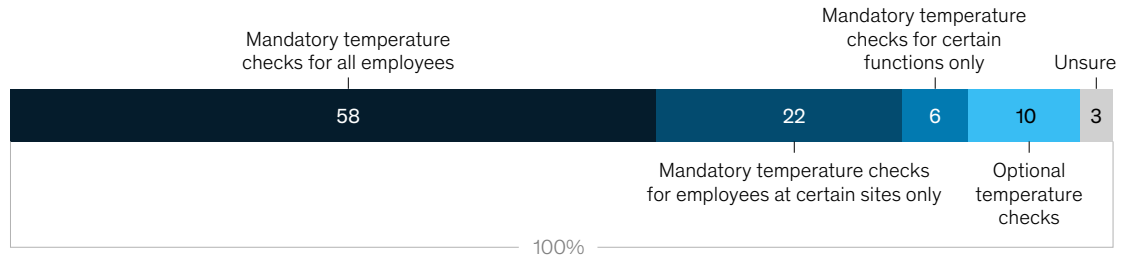
<sup>5</sup> Respondents could select multiple approaches to contact tracing, including the use of technology (an app, for example), which 13 respondents reported. Five respondents also reported the use of third-party assistance with contact tracing.

<sup>6</sup> Suzanne Rivera, Kate Robu, Virginia Simmons, and Shubham Singhal, "Reopening safely: Sample practices from essential businesses," May 2020, McKinsey.com.

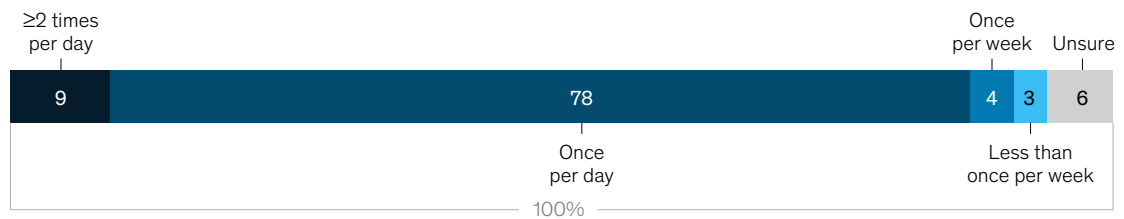
Exhibit 6

**Of respondents' companies that plan to perform employee temperature checks, 58 percent would make them mandatory.**

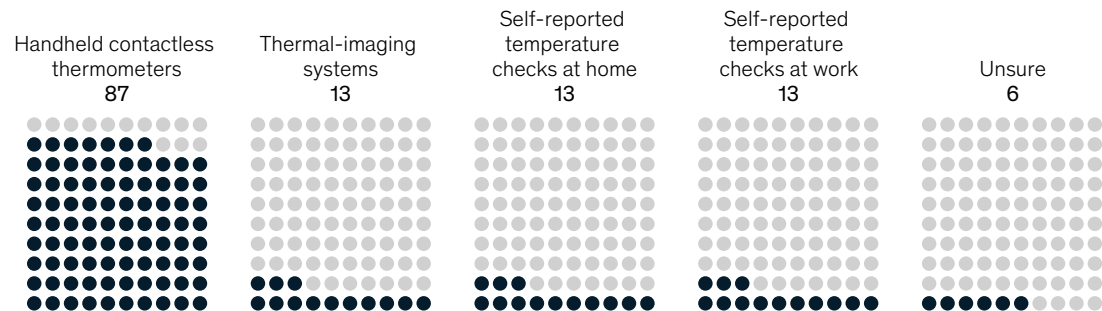
**Companies' approach to temperature checks**, % of respondents who said their companies are performing, or plan to perform, temperature checks<sup>1</sup> (n = 77)



**Frequency of temperature checks**, % of respondents who said their companies are already performing, or plan to perform, temperature checks<sup>1</sup> (n = 77)



**Technology used for temperature checks**, % of respondents who said their companies are already performing, or plan to perform, temperature checks<sup>2</sup> (n = 77)



<sup>1</sup>Figures may not sum to 100%, because of rounding.  
<sup>2</sup>Respondents could select multiple options in the question.

respondents (Exhibit 7). Thirty percent of respondents report completed or planned changes to ventilation systems or air filtration, which the CDC recommends.

**Using personal protective equipment**

Promoting the use of PPE has involved supplying employees with this equipment (which includes face masks, gloves, eye protection, and gowns or coveralls), implementing rules that require its use, and providing training on proper use. In the survey, almost all respondents say they encourage the

use of PPE or plan to, among both employees and customers (Exhibit 8). Use of face masks is the most commonly reported intervention: 98 percent of respondents say their companies encourage this practice for employees, or will, and 80 percent say the same for mask use among customers. Fewer say their companies have gone further, to make masks mandatory, but it is still a common practice. Seventy-six percent of respondents say their companies will require employees to wear face masks, and 49 percent will require customers to wear them.

Exhibit 7

**Compared with measures to limit contact and isolate potentially infectious people, respondents report less consistent use of hygiene protocols.**

**New hygiene protocols during COVID-19 pandemic, % of respondents (n = 100)**

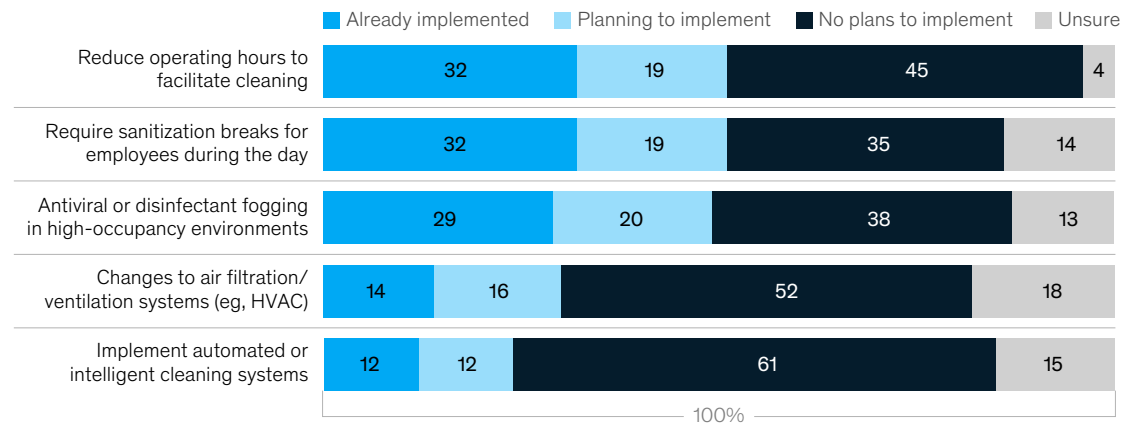
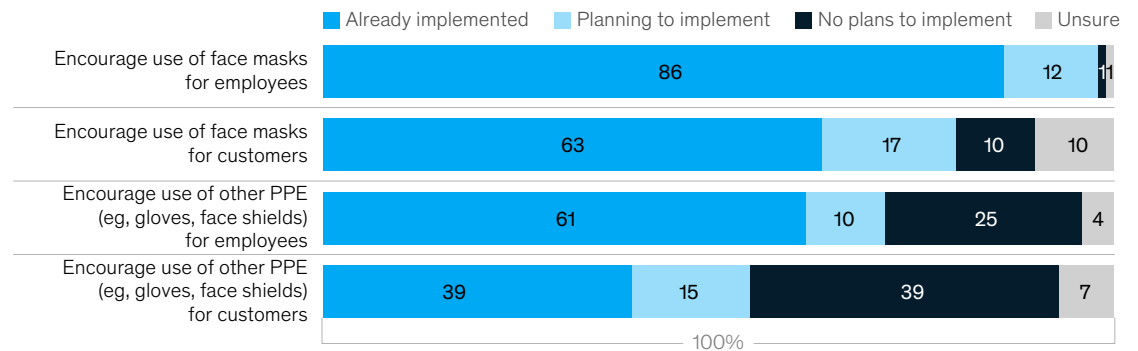


Exhibit 8

**Ninety-eight percent of respondents say they encourage (or will encourage) employees' use of masks, while 80 percent say the same for customers.**

**New working practices to use personal protective equipment (PPE), % of respondents (n = 100)**



**The measures that reinforce new behaviors and protocols**

The interventions above represent significant and even disruptive changes to day-to-day life at work for many US businesses. To help reinforce the behavioral changes that are needed for a safe return, many respondents report the use of, or plans to use, a range of fundamental change-management practices (Exhibit 9).<sup>7</sup> Most commonly, respondents report the creation of new communication channels around new work practices and leaders role modeling safe behaviors.<sup>8</sup>

Training on new workplace practices and disciplinary measures for failure to follow health protocols are reported less often. But most respondents say that their companies plan to implement each measure or already do so.

The survey results suggest that companies are implementing a range of changes to practices, policies, and the physical work environment to facilitate a safe return to the workplace.

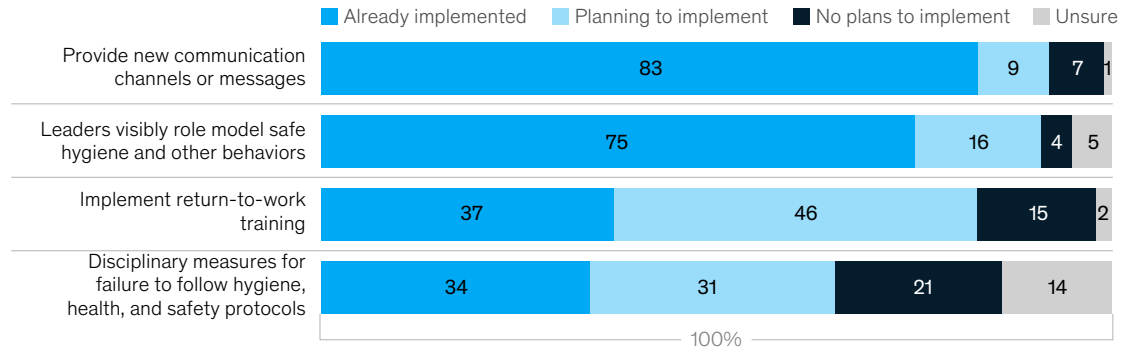
<sup>7</sup> Tessa Basford and Bill Schaninger, "The four building blocks of change," *McKinsey Quarterly*, April 2018, McKinsey.com.

<sup>8</sup> For more on new communications channels, see Ana Mendy, Mary Lass Stewart, and Kate VanAkin, "A leader's guide: Communicating with teams, stakeholders, and communities during COVID-19," April 2020, McKinsey.com.

Exhibit 9

**Respondents’ companies are using a range of change-management practices to reinforce new behaviors around a safe return.**

**New measures implemented during COVID-19 pandemic, % of respondents (n = 100)**



Respondents say their companies are actively planning, or have already implemented, many different measures to help keep their employees safe—and most companies are making changes across the four types of interventions: limiting person-to-person contact, identifying and isolating potentially infectious people, increasing hygiene protocols, and using PPE.

Going forward, continued evaluation of the changing public-health and epidemiological situation will likely be a key consideration for companies in assessing their approach to workplace safety. What’s more, consumers are likely to seek assurances that they will be safe when visiting a company’s locations or using that company’s products or services. While opinions differ on the best timing and pace for returning on-site, considerations regarding how to establish a safe work environment can help minimize further transmission of COVID-19 and support economic recovery.<sup>9</sup>

*These materials are being provided on an accelerated basis in response to the COVID-19 crisis. These materials reflect general insight based on currently available information, which has not been independently verified and is inherently uncertain. Future results may differ materially from any statements of expectation, forecasts, or projections. These materials are not a guarantee of results and cannot be relied upon. These materials do not constitute legal, medical, policy, or other regulated advice and do not contain all the information needed to determine a future course of action. Given the uncertainty surrounding COVID-19, these materials are provided “as is” solely for information purposes without any representation or warranty, and all liability is expressly disclaimed. The recipient remains solely responsible for all decisions, use of these materials, and compliance with applicable laws, rules, regulations, and standards. Consider seeking advice of legal and other relevant certified/licensed experts prior to taking any specific steps.*

<sup>9</sup> “Crushing coronavirus uncertainty: The big ‘unlock’ for our economies,” May 2020, McKinsey.com.

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