

Managing Teams Remotely

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The session will begin at **xxx** prompt.

Dial In Numbers

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Webinar ID: **xxxxx**

Welcome to this webinar on best practice in managing remote teams for members of the X Chartered Insurance Institute.

Intro to me/background.

There are lots of attendees expected on the webinar so I'll spend one minute running through how it will work and that also gives those joining a little late some time to join.

- Missed the dial in details when you joined?

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- Attendees will be on mute most of the time to avoid background noise
- You can use the Q&A function to ask any questions and I will do my best to 'unmute' you for Q&A at the end

Agenda



Preparing to work remotely



Communication



Setting clear expectations



Team culture and morale



Recruitment and new hires



Getting feedback



Further resources

Preparing to work remotely...

The coronavirus pandemic is causing a lot of uncertainty for us, our teams, colleagues and clients. Travel is being restricted, the Govt are advising against non-essential contact and for people to work from home where possible. Many companies have already implemented remote working policies for the foreseeable future and others are no doubt considering doing the same.

While this first section is on preparing to work remotely I some of the content will still be very relevant even if you have already started to work from home...

Make the most of any preparation time...

DECIDE WHAT TECHNOLOGY YOU'LL USE AS A TEAM

TEST YOUR TECHNOLOGY – HAVE A 'WORK FROM HOME' TEST DAY

RESOLVE ANY ACCESS ISSUES WITH IT AS SOON AS POSSIBLE

PREPARE YOUR TEAM FOR THE POSSIBILITY OF WORKING FROM HOME

Decide on your tech – you'll need to have reliable tools to make collaboration possible and then think about how your team should use these tools and agree this up front

Test your tech – if remote employees can't download files, don't know how to use the tech you've decided to use or struggle to hear on a teleconference this will have a significant impact on productivity through lost time. Find out any issues and sort these out ASAP. You need to know that everyone can do a full day of work using the tools which is why I suggest having a full day all working from home rather than just getting people to test their access/log ins and reporting back.

Prep your team for the possibility of working from home – cover this later in more detail

Some tips on tech...

- Additional tech can be useful if you have a team that is comfortable with tech and has easy access to personal laptops, tablets or smartphones
- All team members will need to be reminded that any tools used that are not corporate tools must only be used for collaborative working and never for sharing client/customer info or confidential company information
- For video chats: Zoom (more reliable than Skype and free to use for calls up to 40 mins), Skype, Google Hangouts
- For team chat: WhatsApp Groups or private Facebook Groups
- For team boards/collaboration: Miro.com
- For advanced team boards/projects/workshops: Mural.co

Generally speaking you should use the technology that your company provides – many companies now have things like Microsoft messenger/Lynk/Skype for Business which provide instant messaging and video services. If you have corporate tools in it makes sense to use these.

There are some additional tools listed on the slide that I recommend considering if you do not have an instant message/video software provided by your company.

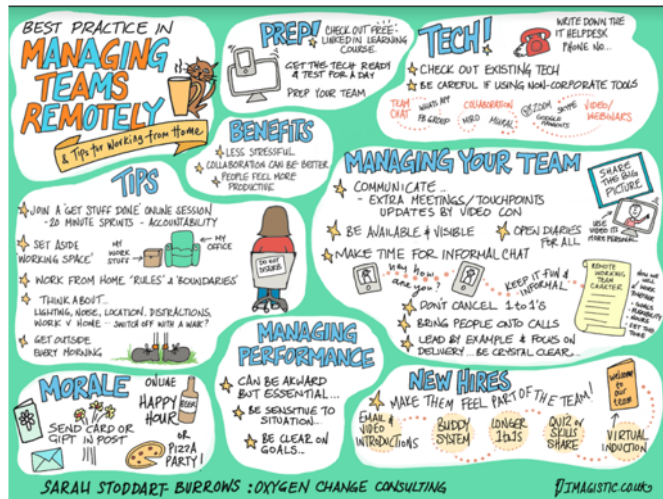
There are also some tools that are useful for more advanced purposes like virtual team boards, virtual brainstorming/workshops, collaborative planning sessions, etc.

It is important to ensure these are only used for general collaborative work and are not used to share any client, customer or confidential company information as this may breach GDPR and/or your company policies. If in doubt, seek guidance from your manager, head of department or IT.

A final tip on tech is that at some point everyone is likely to have something they need to contact the IT team about – especially if they get locked out of remote access or forget their password which will mean they won't be able to log on and find the IT

help desk number, get all of your team to save the number in their mobiles.

A creative option for workshops or strategy meetings...



www.imagistic.co.uk

As well as these tools there are other creative ways of working – this is an example of a 'graphical recording' of this webinar done by Emma Paxton from imagistic.co.uk

It's great for things like workshops, strategy sessions or if you need to communicate changes to people. Emma can join video conferences or webinars, listen to the session and produce an overview which makes complex topics easy to understand in a way that will stick with the attendees much longer than slides or meeting minutes.

Benefits of Remote Working



90% REPORTED THEIR FAMILY AND PERSONAL LIFE IMPROVED.



85% SAID THAT THEIR STRESS WAS REDUCED.



80% SAID THAT THEIR MORALE AND ENGAGEMENT IMPROVED.



62% FELT MORE TRUSTED AND RESPECTED.

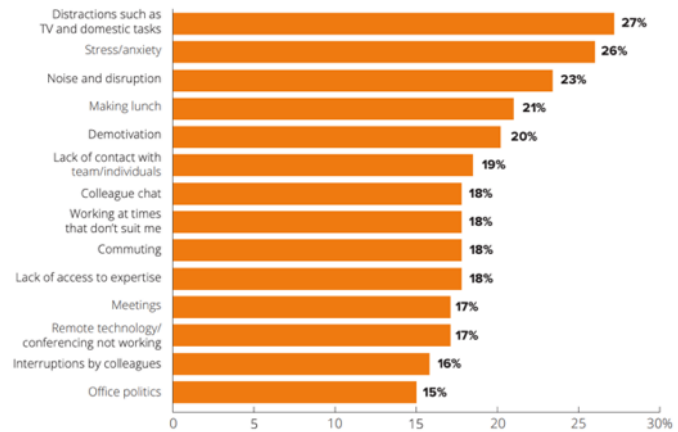


AND 93% EVEN BELIEVED THAT COLLABORATION WAS BETTER THAN BEFORE.

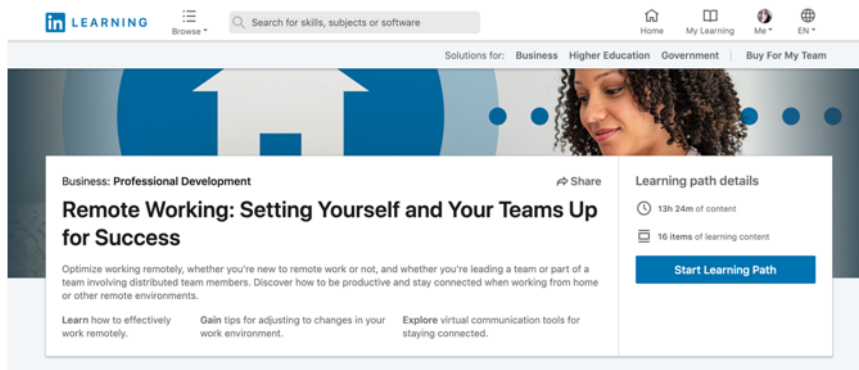
MIT study on remote working.

Your team might need some support...

- Many people believe they'd be more productive if they had the freedom to work from home. FlexJobs' 6th Annual Work Flex Super Survey found that **76% of employees believe they can get more done remotely** due to the frequent distractions from colleagues and general office busyness
- The truth is, though, that some *need* the structure of the office to keep focused. According to Avast's 2018 Mobile Workforce Report, **46% of respondents say the greatest downside of working remotely are the distractions**, a point many don't anticipate when moving to remote working



Take advantage of this free course from LinkedIn Learning...



<https://www.linkedin.com/learning/paths/remote-working-setting-yourself-and-your-teams-up-for-success>

Has various standalone modules – you can do all of them or pick and choose the most relevant. 13 hours of content for free!

Working remotely, time management, productivity, presence on video calls
Managing stress, building resilience
Leading and managing remote teams
How to use various remote working tools

Another tip – is a GSD session (Get 'Stuff' Done): Everyone picks a topic they want to work on – one person hosts on video conference and everyone else joins (these should be voluntary not mandatory!). Split into sprints of 20 mins with breaks in between to get coffee/chat and then enter the next sprint. Helps people get into the 'flow' and avoid distractions. I will be hosting some via my LinkedIn page if anyone wants to join you can connect with me.

Preparing your team to work remotely...

- Find a space in the house which you can establish as your 'office' during the day
- Negotiate your 'working from home rules' with your 'stakeholders'
- Figure out what you need to work best (Lighting? Quiet or background noise? Seating?)
- With client meetings consider the background to your calls and the lighting
- Turn off your app notifications if you have a smartphone
- Set your boundaries and make them clear to colleagues – have a clear boundary between 'work time' and 'leisure time'
- Get outside in the morning for at least 15-20 minutes to keep your circadian rhythms in balance

Fundamentally its no different to working in the office but a few tips...

Find a space – obviously a study is ideal, but it may be a spare room you can put a small laptop desk in, the kitchen/dining table or the sofa (if nowhere else). Make sure you can either leave your work kit out but shut it away from view (e.g. in a study) or have a box/bag that you can store your work kit in once the work day is over and easily get it back out. You want to be able to have a clear delineation between 'work time' and 'leisure time'.

Negotiate working from home rules – are you sharing a house with other people? If so, you'll need to lay down some clear rules about when you are and aren't available to do chores, answer questions, play with kids. Set some boundaries. You may need to negotiate these if there are two working parents while the children are out of school and then discuss this with your manager (and your teams may need to do similar), we're all going to have to be a bit flexible during the next few months.

Setting boundaries with colleagues – you'll need to consider your own personal boundaries in terms of work as its easy for it to seep into your free time when your office is at home. What hours will you be prepared to work and what is sacrosanct? If you decide to take a period of leave and won't be checking email or group chats make this clear to colleagues in advance and then stick to your commitment to yourself.

I highly recommend having some kind of routine that you do at the end of the 'work' part of your day that creates a transition from work to leisure. It could be taking the dog for a walk as soon as you have closed your laptop down, having a coffee break, changing clothes or taking a shower. Building something like this into your routine will help you to switch off.

Get outside in the morning, even if it's just drinking a coffee on the back doorstep for 15 mins as otherwise you may find that the lack of natural light, especially in the morning starts to interfere with your sleep. The natural

light will stimulate your circadian rhythms which will keep your sleep patterns consistent and healthy .

Consider how you can get some exercise in each day – you will be mentally tired but will have done very little movement all day which also may stop you from sleeping well and isn't healthy over weeks or months. It doesn't have to high intensity, it can just be a gentle walk for a while.

Communicate

Communication is key to remote working – to make sure the team are aligned, reduce anxiety and to set clear expectations

When you and the team are in the office we're all able to pick up a lot of information about the bigger picture, context and priorities from discussions we overhear, chats we have at the coffee machine or while we're waiting for a meeting to start – all of this disappears when everyone is working from home and this is one area that managers and leaders need to consciously fill.

Consider that you may want to break the usual established office meeting cadence – it might be useful to have additional alignment meetings or team touchpoints on Mon/Wed/Fri or daily 15 mins video touchpoint meetings, etc. Talk to the team about how they would like to work – if anything err on the side of overcommunication in such a new scenario and uncertain times, you can always check in with the team and reduce the frequency once they say they're comfortable.

Document and share progress daily – can be by email, dashboard (e.g. on Miro) or interactive meetings (they don't have to be long meetings, it can be a 15 min team touchpoint by video conferencing once a day for example)

While we focus on you managing your own teams, work with your management team to make sure you have good communication channels with your own managers and peers as needed. You need to be sure that you are getting the information you need about the bigger picture and

priorities in order to pass this on to your own team.

If you identify any confusion on the team about priorities or ways of working – press 'reset' – gather the team together on a team call or video conference and start over

Building & keeping up trust and rapport



Schedule regular time to communicate to the team as a whole



Give them a sense of the “big picture”: of how the work they’re doing fits into your project, or your team’s role, as a whole.



Provide regular, detailed feedback to each individual on what they’re doing well.



Ensure you’re available as much as possible for quick questions (drop ins, time you’ll be available or not)

When managing remotely it’s easy to just talk about what needs to be done, this cuts out a lot of the trust and rapport building things you probably do in the office every day without even thinking about it – the small talk, showing interest in them and their lives outside the office, treating them as a complete person. Don’t forget to do this while working remotely though you may need to think about it a little more to begin with.

Video – we touch on this a few times through this session. Research shows that most of the communication we do is non-verbal. When you don’t get to see someone in the office every day, having any type of visual clue to what someone is thinking is essential. Whether you’re gauging their reaction to a change in plans, or just trying to judge their overall mood that day, video tells you a lot more than a call, email or instant message will ever reveal. Just don’t forget to give people notice that you plan to use video – no-one wants a 1-2-1 with their manager in their PJs!

Most importantly, trust your instincts when you see something might be wrong. Ask in a call, or make time to ask about it. Those non-verbal clues you see on video are your opportunity to fix problems when they’re small for your employees

Be visible – in the absence of your physical presence look for methods to be virtually visible.

Never cancel 1-2-1s – reschedule if you have to, but don’t cancel; one of the fastest ways to build resentment on a remote team is regularly cancelling 1-2-1s

One on ones provide an opportunity to make up for all the missing interactions you would normally have in the office as well as to handle all the little things that build up over the course of a week. With

so much to cover, you simply cannot afford to miss one for these team members.

Trust and rapport will be especially important over the coming months – your team may be going through all sorts of tough times (concern for elderly parents, elder care duties, juggling work with kids being off school, bereavements or worry about loved ones who are ill, anxiety about their own health particularly if they have underlying health conditions).

When you try to work from



HOME

Use the power of GIFs and memes...

- Given that so much of communication is non-verbal, it's hard for words alone to convey how you feel about something. Especially in work, words can come across more aggressive, or not as impactful as you may like.
- If someone did great work, or there's a good team win, find a gif at a site like giphy.com and send it with the message praising them
- **Watch how much better a reaction you get than when you just send a standard email.** You can get a similar effect if you want to diffuse an email by putting an emoticon at the end to show you're not too serious.

Build a culture of adding people on calls...



- As a leader, set the example. When situations arise that need collaboration, you should **add the person to your call or video conference**
- This really speeds up decision making and progress when working remotely
- Either give your team advance notice they might be added by video as and when needed or add them by call (no-one wants to be on video in their PJs!)
- You can make this easier by having the right tools at your disposal (the same software on everyone's computers, hardware in conference rooms, etc) to reduce the friction of looping someone in.

It's easy to have discussions and pause and say, *"Sam should be involved."* If Sam is in the office you will likely grab them and bring them into your meeting, but if you're all working from home then it may lead to delays in decision making or moving things forward because now you feel you need to have yet another video conference with Sam.

Try to avoid this where possible as it isn't a very agile way of working and just slows things down!


As a leader, set the example. When situations like that arise, you should **go out of your way to get the right people on the call/VC**. It is not a way of working that people are used to so you will need to take the lead by explaining that this is one of the ways you'd like the team to work and then setting an example yourself.

If you do want the team to work in this way – give people notice that they might be added on to VCs at any point in the day if they're available so that people know to expect that.



Set clear expectations...

Remember – a lot of what you communicate about expectations and ways of working will be by your own example



Set clear guidance on expected ways of working...

- Are there certain hours you expect people to be online?
- How much notice do you expect to be given if they need to be offline?
- How much individual flexibility is there?
- Do you have clear KPIs and goals in place already? If not, set some!
- Do you have or need to have a team board with KPIs, a work pipeline board (Kanban board) or a leader board?
- You will need to set the tone, live by the ways of working you ask for from others
- Hold people to account but focus on delivery, not hours worked

I recommend setting some guidelines about how you'll work as a team during this time. You can set them as manager and cascade them or you can get the team together on a video conference and agree them as a discussion – this way they'll be more bought in to sticking to them and will feel like the guidelines set are fair and reasonable.

The slide gives some examples of things to consider when thinking about how the team should work.

I would recommend as part of this sharing open access to calendars across the whole team including yourself (and even consider making it viewable by all colleagues) – make sure that your team know how to block their calendar out on Outlook as being 'out of office' and that they set a clear out of office message (when they are out from, when they expect to be back and who should be contacted in their absence). Put in place a process where daily 'movements' are shared

Be crystal clear about tasks and goals

- What are the parameters and deadlines for the task?
- How will you be judging its quality?
- What progress reports do you want and how often?
- Do you want to be copied in to emails about this task?

Everyone has a different idea of what doing something "quickly" or "well" means. Whether showing examples of what you expect to be done, calendar sharing, etc., make sure you have clear expectations from those you work with online.

People learn a lot from context, and the less time they spend in the office, the less context workers have about their manager's expectations. So managers need to be explicit about what the remote worker must produce. The parameters, deadlines and metrics of tasks must be crystal clear, but so should the manager's personal feelings. If a manager needs weekly progress reports, for instance, or prompt replies to emails, the manager must say so and hold the employee accountable.

Team culture and morale...

Motivating and rewarding



- **Sending a physical card or gift** to let a remote employee know how much you appreciate their work, this can also include an online delivery of flowers/chocolate/wine/loo roll/hand sanitiser
- **Awarding a gift card** perhaps for Amazon or another online retailer – this has the advantage that you can send it electronically. Extra bonus points if it has a personal relevance to them
- To build team morale you could try a **synchronous pizza party or Friday happy hour** where each person joins from their computer at the same time for more of an informal catch up – like a virtual after work drink at the pub!
- Ultimately, it's up to your creativity. Experiment with what you think fits your culture and engage your team for ideas and feedback on what they like and don't like.

Managing performance

- It may feel awkward to discuss performance issues over the phone or on a video call, rather than face to face – but those awkward discussions are part of managing remote teams
- **When considering whether or how to deliver negative feedback**, take into account any difficult circumstances your employee might be facing
- **If an employee's performance isn't up to the standard you want, then be proactive about addressing that.** This is just one of the reasons it is going to be really important to have those regular 1-2-1s, set clear expectations and keep up rapport.



Being physically present in an office, makes it easy to spot who's having a rough time with their babies, who's struggling on through a cold, or who's facing difficult decisions about nursing their parents. **With remote employees**, you might not be aware of these situations. For example, if one of your employees is normally very proactive and on top of deadlines and they suddenly start sending rushed work at the very last minute, you might want to gently check whether they're going through something difficult in their personal life.

Again, this is particularly relevant over the coming weeks and months when each of us may be facing more challenges in our personal life or in juggling work and parenting than we would usually be.

Recruitment and new hires...

Help them feel part of the team...

- **Email** – Make sure that you send an email on their first day welcoming them to the team and to your team and stakeholders introducing them and their role
- **Team Introductions** – Consider having a special video team meeting to introduce them to everyone on the team and to brief them on the basics of who does what
- **Schedule VCs with important contacts** – Create a list of important contacts for them to know in the business and depending on their seniority ask them to schedule VCs in to introduce themselves and talk to the other person about their role OR you or a buddy may schedule some introductions to key people
- **A buddy system** – A buddy system will be more important than ever, someone they can speak to frequently with the 'stupid questions' and who can take some responsibility for their induction programme
- **Team Building Games** you can play remotely
 - **Get people to take photos of their desk or workspaces** and share them with the group. This can be a fun insight into how and where people like to work. Another option here is to share a photo about an important aspect of your life.
 - **Create a quiz to help them find out more about their team.** Keep it light, fun, and quick (one word answers are good). Alternatively, ask people to share, "Three facts about you that might surprise us".
- If you don't think that games are going to be very engaging or interesting for your team, you might want to find a different way to get everyone together in a fun but productive way like a 'coffee and learn' where people take turns to give a 10 – 15 minute presentation about a topic relevant to their areas of interest and expertise could be a great option.

In most scenarios, all of your employees will never have met one another face to face. When someone new joins in, it can be tricky for them to get to know people in a way that's natural in an office environment.

In most cases though, it is important for your team to feel like... a team! You'll have team members who need to work together on some work, so it makes sense for people to get to know one another.

There's very little that can be done in a normal office that can't be done online now – for example with Zoom and Skype you can share screens which means someone can show them how to use the office systems and can even handover 'control' of the mouse to the new starter to do the next quote/renewal/etc to make sure they're clear.

A buddy will be more important than ever – that person needs to be given time in their workload to do the buddy role properly as it will take more time potentially working remotely. Make sure it is someone who is comfortable with technology.

A few more thoughts on new hires...

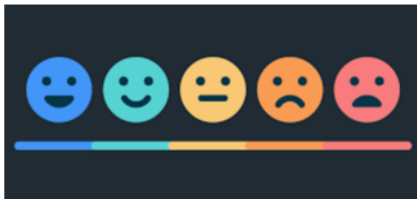
- **Think about how to make a virtual induction programme:** online training, screen share training, video introductions, buddy system
- **Have longer and more frequent 1-2-1s**
- **Face-to-face with social distancing:** Can you meet them outside on a warmer day staying 1 meter+ apart? Think of things like a walk outdoors, picnic working lunch at an outdoor table...

In an office, you'd expect to spend time with a new team member on their first day. Without any doubt, you'd provide them with crucial paperwork and things like a key card to get them in and out of the office, a pass for the car park, and so on. You'd then introduce them to colleagues, inform them about the office policies, and let them know you're available if they need help.

If you need to recruit new team members during the next few weeks or months when we are all working from home you'll need a clear onboarding process that works virtually! You want them to feel settled and confident as quickly as possible. So you want to make sure they have access to everything they need in order to get their work done.

It may be that at an appropriate time you can set a high performer or someone who aspires to a team management position the task of creating a virtual onboarding programme as a specific project or piece of work (I would wait until you know you need to hire someone so this isn't wasted effort).

Get feedback...



Regularly encourage feedback...

- *What's your favourite part about working remotely? What is your least favourite part, is there anything you're struggling with or would like to improve? (Understand what drives them)*
- *What's your daily routine like for working while you're at home?*
- *Do you feel like you're getting all of the information you need to do your job well while you're working at home?*
- *How are the tools we use as a team working out for you remotely? (i.e. Are they handicapped by poor audio on hangouts or struggle using any tools the team uses?)*
- *How do you feel team morale is? How are you feeling about our circumstances at the moment?*
- *How could I better support the team while we're working at home?*

Every single one of us is adjusting to the 'new normal' at the moment – none of us will get everything perfect at the first try – seek regular feedback from your team on what is working for them and what they would like more or less of and adjust as needed...

Questions?



Sarah Stoddart-Burrows

Feel free to connect to me on LinkedIn.

<https://www.linkedin.com/in/sarah-stoddart-burrows-8844369/>

Further resources...

Further resources...

- Imagistic: Contact Emma Paxton at Imagistic for amazing graphical representations of calls/workshops – great for strategy sessions and buying teams into change <http://imagistic.co.uk/>
- Zoom teleconference/videoconference/webinar hosting online training: <https://zoom.us/docs/en-us/covid19.html>
- Harvard Business Review 'How to Manage Remote Direct Reports' <https://hbr.org/2015/02/how-to-manage-remote-direct-reports>
- Building Remote Teams podcast: <https://podcasts.apple.com/ca/podcast/building-remote-teams/id1467910915>
- Free LinkedIn Learning on Remote Working: <https://www.linkedin.com/learning/paths/remote-working-setting-yourself-and-your-teams-up-for-success>