

# Managing Remote Teams

## *A Best Practice Guide*

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As a result of the COVID-19 outbreak, many non-critical employees will be working remotely. It is important that managers prepare for this change, and proactively anticipate challenges to managing virtual teams. Specifically, issues with trust, collaboration and productivity can often arise. This guide explains how managers can take action to create the right conditions for success. Applying the best practices that are described below can help managers ensure their teams remain coherent, motivated, and productive.

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### Success Factors

#### **TRUST:**

***Build and maintain trust.*** When managers can't directly observe work, they tend to monitor and follow-up on remote workers more than in-office workers. If expectations about regular check-ins are not set beforehand, the result can be team members feeling that their manager trusts them less because they're working remotely, negatively impacting their motivation and performance. It is imperative that managers set expectations for check-ins up front and adhere to them consistently.

#### **COMMUNICATION:**

***Set-up communication protocols and tools.*** Without a specific communication plan in place, it is far more difficult to coordinate work and maintain productivity in a remote environment. Virtual teams need clarity and standards about when and how information will be shared. Having the right communication protocols and tools in place is a key success factor. CUIMC IT has summarized a list of technology resources that are available to facilitate remote team communication (please visit: [COVID-19 Remote Work](#)). It is important to explicitly communicate what technological platforms your team will be using and how you expect them to be used (i.e. Microsoft Teams for Instant Messaging, personal phones for calls, etc.). Ultimately, the tools you select will depend on the technology that your team members have available in their homes.

#### **ACCOUNTABILITY:**

***Assign work and hold people accountable.*** Remote team members have far less supervision. It is important to set them up for success by clearly defining actions, specifying who is to complete them and establishing an agreed upon due date. It is also useful to mutually decide on periodic progress check points. The frequency of checkpoints will depend upon the difficulty of the task and the experience of the person. If, on occasion, a team member does not follow through on a commitment, then do not berate the person. Rather, engage in problem-solving by encouraging the person to think about what they can do to get back on track, how they might prevent this problem from recurring, and what additional help or support they may need from you.

## Team Management Phases

There are three phases in managing any kind of team: *preparation, launch, and execution*. According to teamwork scholars and practitioners, there is robust evidence that shows ‘*preparation*’ is by far the most critical phase. Below is a list of key tasks that managers should perform in each phase to maximize the effectiveness of their virtual teams. You can also use these items as a checklist.

### Preparation

It is important to think about how you will structure work and communicate when working remotely.

#### STRUCTURING WORK AND ROLES

You may or may not need to redesign workflows. Either way, you will need to assign work.

- Create or review team project list to identify accountabilities by team member.
- List short- and long-term assignments by team member, including deliverables and due dates.

#### ESTABLISHING COMMUNICATION NORMS

There are multiple methods for communicating remotely, including phones, email, texting, instant messaging, and web conferences. Here are questions to think through and discuss with your team:

##### **Contact Information & Technology Inventory**

- Do you have the contact information for all team members and have you distributed it to the full team (*i.e., cell phone numbers, email addresses, etc.*)?
- Do you have an inventory of the home office resources of your team members (*i.e., phone, personal computer, tablet, Internet connectivity, print/fax/scan capability*)?

##### **Platforms & Modes of Communication**

- What avenues of communication will we use, and how will we do that?
- How will we share documents? (*For example, you could set up VPN to access shared drives remotely, use Microsoft Sharepoint or Teams to collaborate*)?
- Will team meetings be held via teleconference or video conference? (*For example, you may want to use videoconferencing and can use Microsoft Teams, Zoom, Skype or other platforms*).
- What is the dress code during video conferencing (*e.g., business casual*)?
- Do we want to text each other? What about instant messaging?

##### **Response Time**

- What will our response time be to communications from each other and our clients?
- Do we have different response times for different modes (*e.g., email vs. phone call*)?

##### **Schedule**

- How often will we meet virtually? Find the right balance to ensure both social connection and work coordination.
- What are the regular business hours and the expectations for communicating during and after regular business hours?

## Launch

During the launch phase:

### A. Schedule and conduct launch meeting. Sample agenda –

- Check-in to see how everyone is managing the disruption in their daily lives caused by the COVID-19 crisis. Note that Employee Assistance Program resources are available, if needed
  - Express Empathy: Adapting to remote work is challenging under normal circumstances and even harder in our current situation. COVID-19 is causing tremendous anxiety as people worry about themselves and their loved ones. It is important to be empathetic to the fear and stress your team members may be experiencing. Empathy is the capacity to understand and share the feelings of another, even if it is not something you are personally experiencing. If team members seem anxious, do not ignore it. Check-in with them and ask what they need to move forward. This will help them feel supported and enable them to refocus on work. Everyone's situation and vulnerabilities are unique, and as managers we need to not only lead the work but care for each other in this unique time.
- Assign someone to take notes and circulate meeting minutes
- Describe opportunities (no need to commute, etc.) and challenges (harder to communicate and coordinate work, social disconnection, etc.); seek input on how to manage challenges
- Describe how staff will see a change in the ways they interact with management in a remote environment and why
- Discuss communication methods and schedule (for team meetings and one-on-one meetings)
- Decide upon technology tools to be used and explain access procedures
- Ensure team members have information and training on how to use relevant software
- Communicate work goals/objectives
- Assign team members specific tasks, due dates, and check-in times
- Q&A.

### B. Confirm that technology is functioning properly

- Conduct operability tests
- Coordinate with CUIMC IT support as needed

### C. Circulate meeting minutes and follow-up on action items

## Execution

During the execution phase:

### ***Communication***

- Hold team and/or one-on-one virtual meetings as per communication schedule
- Hold the team accountable to established communication norms
- Periodically solicit feedback to see if the changes in management, communication modes, frequency, and norms are working for the team

### ***Meeting Management***

- Build in time during virtual meetings conversations for team members to chat as they would in person
  - This can be informal or structured if necessary. Many remote teams have check-in or icebreaker type questions to maintain the interpersonal relationships. Sample check-in questions: Who is your favorite super-villain, what is your favorite city, band, movie, etc. These should be light and fun to break the ice and foster relationships
  - Help maintain team morale and focus by accentuating the positive. For example, encourage the team to share what's working for them in managing disruptions and offer suggestions

### ***Performance Management***

- Monitor team deliverables
  - Consider establishing a daily To Do list with each team member in the morning and asking them to submit a summary of their progress at the end of the day.
- Provide feedback as needed including positive recognition of accomplishments
- Discuss accountability issues (e.g., pattern of missed deliverables, low engagement, etc.) with team members as appropriate
- Compile and provide status reports to management as per your department's communication schedule