Managing Teams Remotely

Chartered Insurance Institute

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The session will begin at Xpm prompt.

Dial In Numbers

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Webinar ID:

For any early joiners – I'm currently taking a coffee break(!) so you will only hear me check in now and then until just before we start

You are all on mute so feel free to carry on chatting or typing while you wait ☺

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- 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

- Essential tips for working from home
- Communication
- Setting clear expectations
- Team culture and morale
- Getting feedback
- Further resources

Essential tips for working from home…

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.

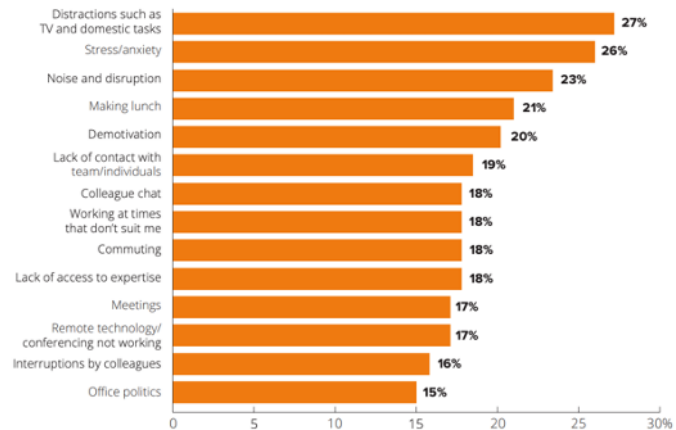AND 93% EVEN BELIEVED THAT COLLABORATION WAS BETTER THAN BEFORE.

MIT study on remote working.

Probably expected that such high levels of people reporting an improvement in personal life and reduced stress given that working from home cuts out commute and have a little more time to balance work/life.

However perhaps less expected and to some degree counter-intuitive is 93% reporting collaboration better than ever. Suspect what is going on here is that consciously making an effort to collaborate because of remote working when it is perhaps taken for granted to some extent in an office (links to how many people are finding that they are in more contact with friends and family since lockdown – making conscious effort due to circumstances).

Distractions can be a challenge…

- 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

Distraction	%
Distractions such as TV and domestic tasks	27%
Stress/anxiety	26%
Noise and disruption	23%
Making lunch	21%
Demotivation	20%
Lack of contact with team/individuals	19%
Colleague chat	18%
Working at times that don't suit me	18%
Commuting	18%
Lack of access to expertise	18%
Meetings	17%
Remote technology/ conferencing not working	17%
Interruptions by colleagues	16%
Office politics	15%

Global mobile workforce study last year looking at people working fully or mainly remotely

On the flip side people often think that one of the benefits of remote working will be 'super productive' due to decreased distractions – no-one dropping by desk to catch up, no being pulled into meetings unexpectedly.

True to some extent….however….sometimes it can be a case of swapping one set of distractions at work for another at home. Probably even more the case now as depending on personal circumstances likely to have other halves and children around which wouldn't be a usual working from home set up. Will cover some ways of managing these distractions in a second.

1. Make sure your brain knows it is 'work' time

- Have a morning routine before you start work

- Find a space in the house which you can establish as your 'office' during the day

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

Have a morning routine – doesn't have to be meditating for 30 mins, doing yoga and drinking green tea(!) but stick to some semblance of routine including getting dressed, coffee/breakfast before sitting down. Try to stick to a consistent routine each morning.

Find a space to make your 'office' and keep this place consistent EVERY DAY – obviously a study/spare room is ideal, but not everyone has the space so may be the kitchen/dining table or the sofa (if nowhere else). Important thing is (A) make it consistent every day and (B) if it is the sofa then make sure you use a different seat to the one you would sit in to relax in the evening.

Reason for both of these things -> You're trying to create what is called an 'anchor' where you are basically training your brain to recognize that you want it in a productive 'work' mode when you do this routine and go to your 'office'.

2. Think about your working environment

- Light
- Noise
- App notifications
- Seating
- Background
- Lighting for video calls

May sound like very small points and not really that much of an issue if you're just working from home on the occasional day, however when you are working from home consistently for a period of time these small environmental things really make a big difference.

Light: I realized I found it difficult to work in a darker room and had to move rooms to somewhere with more natural light – didn't realise it would have as strong an impact as it did on levels of motivation and productivity

Noise: Assumed would be productive in silence – actually realized accidentally that after so many years in open plan offices I need some background noise. Experiment. I have R4 on low in the background. Try favourite music. Also find 'focus' playlists on Spotify and Amazon Prime Music good – again, if you always put this on when you really need to focus on something you're creating another anchor for your brain to recognize what you need from it

App notifications – consider switching off for some apps during the day, especially 'breaking news' at the moment which can really disrupt your flow (it's been designed to do just that!)

Seating – if you work from home on the occasional day a dining chair might be fine but not every day, you will soon find uncomfortable. Unless you have specific back issues you don't need to spend £300+ on a fancy office chair (unless you want to!). I got mine for £50 from Amazon and it looks good and very comfortable, can always sell it second hand after all this has blown over.

Background – think about what is in the background, don't worry about décor/books/art/pets/whatever – it's nice to see the human side of everyone but may be conscious of some things (ex: washing hanging up, dirty plates). Google Hangouts and MS Teams let you blur the background. Zoom lets you put up an artificial background.

Lighting for video calls – if client/broker or senior meetings make sure lit from in front (either move so window in front of you or use a desk lamp, steal bedside lamp if you have to) otherwise your face will be very dark and hard to pick up facial expressions – does not look professional.

3. Negotiate boundaries with your 'stakeholders'

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. Ex: I'm lucky enough to have a study so I close my door when on a call/focusing on specific work and don't want to be disturbed but have it open other times which means husband knows it's okay to come in for a quick chat. Think about how you can have a similar discussion and how it can work in your own circumstances.

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.

4. Get your brain to switch off

- Be clear about your own boundaries in terms of finishing work
- Clear away your work things at the end of the work day
- Have something you do at the end of each work day that signifies that the working day is over

One thing you will find that is a common theme with people who work from home consistently over a period of time is that they say they struggle with switching off from work...

Must have your own boundaries about finishing work or it can easily start to creep into every part of your downtime. Think about your boundaries – will be different for different people – examples: switch off at X time every night, or okay to work in the evenings Monday – Thursday but will switch off at 4 or 5pm on Friday and not be available again until Monday morning.

If you are using the kitchen or lounge as your work space have a way to clear away your work things at the end of each day, even if it just goes into a plastic or cardboard box. You won't swtich off properly if you have your work laptop staring back at you!

Have a consistent routine at the end of each working day. Exs: walk the dog, have a coffee outside, have a shower, get changed. Just have something that you do consistently – again, you are creating an anchor for your brain to recognize that it is time to relax and switch off.

Pomodoro technique:
- 25 mins work on timer
- Take a short break (5 mins on timer)
- Repeat four times, on the fourth time take a longer break
- Keep going if you get in the 'zone'

- Host a 'Get Stuff Done' session

5. Productivity tips if you really need to focus

If you have a day where you feel you just 'can't get into work' – don't beat yourself up - happens to the best of us – here are a couple of techniques to get really focused:

Pomodoro technique - more info here as an example: https://lifehacker.com/productivity-101-a-primer-to-the-pomodoro-technique-1598992730

Host a Get Stuff Done session – find colleagues or friends who also need to buckle down and want to join in (don't have to work for the same company as you don't share any work specific info with them). Host a video call – you all come with the one or two things you must get done. Start with a 15 min coffee break and chat, share what you want to get done for accountability (e.g. 'I have a long email to a client I need to draft' or 'I need to do at least 10 slides of a presentation I'm working on'). Then set a timer and everyone works for 40 mins – like a virtual co-working space. Once 40 mins is done have a 10 min break and chat and then do another 40 mins with timer. Sounds very weird but the accountability of it makes you really focus on the task, you know you are on a video call so you can't just get distracted on to something else.

6. A final tip…

- Get outside in the morning for at least 15-20 minutes to keep your circadian rhythms in balance

- Do take some exercise every day, a walk if nothing else

Not often covered in all the 'work from home' articles doing the rounds at the moment but a final serious recommendation…

If you work from home consistently over weeks or months you may find your sleeping patterns start to get disturbed - you find it hard to get out of bed in the morning and/or you find it difficult to get asleep or stay asleep.

Linked to circadian rhythms which control the two hormones that regulate sleep patterns, one wakes us up in the morning, the other makes us sleepy at night. Lack of natural sunlight is the issue.
Even though you normally work in an office that won't have a lot of natural light you will still be getting some exposure in the morning – walking from car park, waiting at train station, etc. This is all removed (and it is not the same through a window).

Get outside in the morning, even if it's just drinking a coffee on the doorstep for 15 mins. 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.

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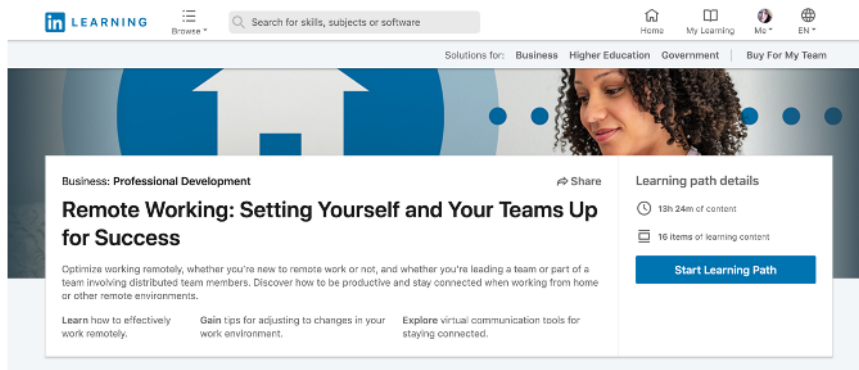
Has various standalone modules – you can do all of them or pick and choose the most relevant. 13 hours of content for free!

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

Create a 'team charter'…

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?

- What progress reports do you want and how often?

- What emails do you want to be copied in to?

- 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

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

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

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 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.

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.

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.

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.

But do give people notice that you'll be working this way…

WHEN YOU'RE WORKING FROM HOME…

AND YOUR BOSS MESSAGES YOU ABOUT DOING SKYPE MEETING.

Team culture and morale...

Lots of ideas out there at the moment so these are just a few ideas that are easy to put in place – be creative.

Can ask the team for their ideas and input too.

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.

People always ask me about this because they feel having a 'managing performance' conversation while not face to face is awkward.

Fundamentally few differences compared to the approach in an office environment so would only say a couple of pointers here:

1. Resist the temptation to put this off until 'we get back into the office' – we don't know how long we'll be working from home, could be weeks but more likely months and thats a long time to let something go. Also nipping it in the bud is better for both parties: if you let it go for months and then address it when back in the office it will go from being quite a small problem at the moment to being a much bigger deal because the poor performance has continued for a period of time and you will feel resentful. Your team member will also feel completely blindsided as nothing has been mentioned to them and then all of a sudden they're being pulled in for a discussion as soon as they are back in the office. Best to nip it in the bud while it's a much smaller issue.

2. Do it on video – you need to be able to gauge their reactions

3. No matter how hard you try it is always going to be harder to pick up on one of your team not being their usual selves when working from home so always give them the opportunity to say whether there is something they need to share before launching into the performance conversation (e.g. How are things for you at the moment? How are you finding working from home? Etc). This is particularly important at the moment as people have all kinds of things going on for them (e.g. anxiety about the pandemic, health concerns, concerns for relatives, possible bereavements, etc).

4. 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.

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…here are some questions you can use to get feedback in 1-2-1s and team meetings.

Could also do a team brainstorm in a team meeting on how people are finding remote working after they've had a couple of weeks of experience:
- What should we START doing differently?
- What are we doing now that we should STOP doing?
- What should we CONTINUE doing?

Feel free to connect to me on LinkedIn if you have any questions, I also share remote working and productivity tips.
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

Appendix

Recruitment and new hires…

May not be top of priorities now so added this so that you have something to think about should you find yourself in the position of recruitment and on-boarding while we are all still at home…

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 and that is approachable and patient. If you choose the wrong person to be a 'buddy' it could really taint how the new starter sees the company and the team and could be

hard to come back from.

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).