MANAGING REMOTE STAFF

A detailed guide on

best practices for keeping a remote team focused, productive and engaged

UNT | SYSTEM

TABLE OF CONTENTS

SECTION 1

Setting the Stage

Pages 3-5

SECTION 2

Involve the Team

Page 6

SECTION 3

Manage Team Performance

Page 7

SECTION 4

Maintain Engagement

Pages 8-10

SECTION 1

Set the Stage

for a Successful Remote Work Relationship

If your remote worker is already a productive and successful member of your onsite team, you may be tempted to skip this step of the process. However, it is critical to both the success of you and your team member, that you come together and establish common criteria for a successful remote working relationship. Remember, being a virtual leader will require you to expand on your traditional leadership skills.

The checklist below provides a starting point to ensure the most important issues are resolved early on in the remote collaboration process.

- ❑ **Establish Clear Goals and Expectations:** Clarify roles and responsibilities and determine concrete goals for all team members. Given that there are limited opportunities for interaction, clearly communicate expectations and goals in the beginning of the remote working relationship. This helps remote staff members understand where to focus their efforts and be self-reliant.
- ❑ **Consider Work Styles and Employee Needs When Setting Ground Rules:** Partner with your remote staff member to discuss work styles, abilities, and preferences, and use these to set ground rules for the remote working relationship. Remote managers should build rapport with each individual in the team, understand their concerns and expectations, and empathize with them.
- ❑ **Meet In-Person at Regular Intervals:** Meet with your remote staff member in-person frequently during the first three months of the relationship to get to know them better and understand their working environment. Find additional ways to work in-person (or through videoconferencing) to keep the relationship strong over time.
- ❑ **Set Protocols about Ongoing Contact Frequency and Communication Preferences:** Encourage two-way communication through e-mail, telephone, and video conference. Further, establish the practice of holding monthly and quarterly conference calls (via videoconferencing and webcasting) to update remote team members on achievements and goals attained by the team.

ESTABLISH CLEAR GOALS AND EXPECTATIONS

At the beginning of the remote work relationship, meet with the staff member to clearly communicate roles and responsibilities and challenges that may arise.

Individual's Role and Responsibilities

- ❑ Highlight the individual's day-to-day responsibilities.
- ❑ Clearly communicate to the staff member that you expect him or her to proactively address any issues that may arise.
- ❑ Clarify how the individual's role and responsibilities affect the institution's objectives.
- ❑ Identify what technology the staff member will need access to and ensure that it is working properly.

Team Attributes

- ❑ Clearly define team members' roles and responsibilities and how they fit with on another.
- ❑ Establish your preferred methods of communication *(see page 13 for more information)*.
- ❑ Describe your management style.
- ❑ Establish protocol for tracking when staff members are on vacation, and make it accessible to all team members.

Discuss Common Challenges That May Arise

- Technology malfunctions or incompatibilities
- Ambiguity of work practices and norms
- Tendency to make assumptions or misrepresent communications
- Misaligned team visions
- Feelings of isolation or exclusion from the team

Establish well-defined and measureable performance expectations.

Effectively Define Performance Expectations

- ❑ Set key metrics on which you will measure the staff member's performance.
- ❑ Provide clear guidelines regarding work quality.
- ❑ Determine frequency of on-on-one and team meetings.
- ❑ Discuss when and how you will provide informal and formal feedback.
- ❑ Link responsibilities to the team's mission and values.

ENSURE CLEAR OBJECTIVES USING THE SMART FRAMEWORK

You should be able to answer "yes' to the following questions for each objective:

1. Is it simple?
2. Is it measureable?
3. Is it actionable?
4. Is it results-oriented?
5. Is it time-based?

Source: CEB Analysis

ESTABLISH COMMUNICATION STANDARDS

Prior to your staff member working remotely, conduct a discussion to establish communication standards and discuss potential challenges of remote work.

By asking specific questions like those outlined to the right, managers and team members can ensure they have the same expectations about standards for communication.

Q: At what times will you be available by phone?

Q: How often will you check e-mail throughout the day?

Q: What are the most appropriate and efficient uses for each channel of communication? (e.g. email, telephone, instant message)

Q: Which or what are the most effective communication channels to use with each other? The team?

Q: Which days will we touch base or meet to discuss progress?

Avoiding Common Points of Remote Team Miscommunication

- ❑ **When problems arise, inform and involve the entire team.**

  Maintain your composure and provide status updates to everyone at regular intervals. Sending your team information preempts employee misinterpretation of silence as being a bad sign.

- ❑ **Learn to read and hear body language in electronic communications**

  Because team members often cannot see each other in person, leaders have to learn how to correctly decipher non-visual and auditory cues.

TECH TOOL TIP

The end goal of technology in virtual collaboration is to replicate the environment of a collocated team. Always look for tools that come as close as possible to simulating everyone being in the same office.

Source: CEB Analysis

SECTION 2

Involve the Team

Keep in mind that if one person on the team is working remotely, then the entire team is in essence a remote team. Remote teams must come together and establish common criteria for successful remote working relationships. The checklist below provides a starting point to ensure the most important issues are resolved early on in the remote collaboration process.

Discuss Team Expectations: Each member of the team needs to have clear expectations with you, but they also need to establish expectations with each other.

- What are the roles and responsibilities of each team member? ❑
- What are the concerns of being a remote team? ❑
- What challenges might remote work present for our team? ❑
- How will we share information? ❑
- How do we create an collaborative environment? ❑

Discuss Work Styles and Set Ground Rules: It is important to discuss different styles, abilities and preferences. This is all about building relationships and trust within the team.

- How will we make actions transparent as possible? ❑
- How will we gather input on projects and decisions? ❑
- How will we share information and communicate to everyone? ❑

Establish Communication Standards: It is important to make a conscious effort to encourage two-way communication and be deliberate in how the team will communicate.

- What forms of communication work best? ❑
- What are our expectations for responding promptly to emails? ❑
- How often do we need to meet? ❑
- How do we make sure everyone's opinions count? ❑

SECTION 3

Manage Team Performance

Managers may struggle to understand remote staff members' workflows given that they cannot directly observe their day-to-day activities.

Challenge

Manager has limited visibility into remote staff member's work processes.

"I get nervous that projects are not going well or that they will not be done on time since I often don't see anything until the final result. This means that I don't have the opportunity to intervene if the project is going in the wrong direction."

- Manager

"I love the freedom working remotely offers me, but I feel like I miss out on the informal opportunities to demonstrate my interests and capabilities. Since my performance is really only judged through a few, formal interactions, I often don't like to share anything until it is fully completed."

- Remote Staff Member

Solution

Evaluate Performance Based on Outcomes Not Processes

Managers should focus on the outcome of the work, not the physical presence of the staff member. Apply this performance management strategy to your entire team to help you treat all team members equitably and evaluate performance using the same criteria for all team members.

Establish Well-Defined Performance Metrics

- ❑ Work Production: Are assignments being completed and deadlines being met?
- ❑ Work Quality: Is quality consistent with expectations?
- ❑ Communication: Are the team standards for communicating being met?
- ❑ Team Interaction: Collaboration, innovation, time management.

OBTAIN FEEDBACK FROM MULTIPLE SOURCES

This is a good practice for all team members, but is particularly important for remote staff members, given managers have fewer opportunities to observe them directly.

- Gather feedback from peers and direct reports, internal stakeholders, and when relevant external customers.
- Evaluate performance in real-time by engaging them in brainstorming, problem-solving and action planning.

SECTION 4

Maintain Engagement

Managing a remote team decreases your line of sight to remote team members and makes it more difficult to monitor engagement levels.

Challenge

A lack of visibility causes managers to struggle to identify engagement issues early on.

"I have little sense of how my remote team members are connecting with their work and team. It's hard to tell if they feel valued, if they need more help, and whether or not they are enjoying their work."

- Manager

"I feel left out of a lot of conversations and decisions. It's as if my manager and team forget about be."

- Remote Staff Member

Solution

Maintain Visibility into Team and Individual Workflows

Managers must make a conscious effort to maintain visibility into workflows and processes.

CREATE SHARED ONLINE WORK SPACES

Online shared work spaces are a good medium through which to promote collaboration.

- Use online project planning tools to maintain visibility into the work capacity of all team members.
- Establish a shared calendar to identify availability, schedules and deadlines.

MAINTAIN CONSTANT CONTACT

Constant formal and informal communication allows managers to track progress and engagement levels.

- Schedule regular meetings to assess progress and identify issues.
- Make a conscious effort to communicate informally with team members on a regular basis.

ACT AS THE TEAM MEMBER'S LINK TO THE ORGANZIATION

Remote team members do not have the same visibility as on-site team members do.

- Make a concerted effort to keep remote team members informed of what is going on in the office and the organization.
- If messages are being spread informally, make sure to include remote team members on those communications.

Solution

Connect Remote Employees to the Rest of the Team

Managers and team members must make a deliberate effort to get to know one another when working in multiple locations.

Foster a Sense of Team

Remote workers may feel isolated from the team, so managers must make a deliberate effort to foster a sense of inclusion.

- Include remote workers in all on-site activities
- Highlight individuals to the rest of the team when they reach critical milestones.
- Create a team "bulletin" board online to celebrate team accomplishments.
- Announce awards during team videoconferences.

Encourage Team Members to Build Personal Relationships with Each Other

Humanize team members by increasing familiarity and building relationships with one another.

- Dedicate a few minutes at the beginning and end of meetings for informal conversations, during which administrative topics are not allowed.
- Encourage team members to share information about their non-work related interests and hobbies.

Ensure Inclusion During Team Meetings

Make a deliberate effort to ensure that remote team members are able to contribute during meetings.

- Follow best practice during conference calls and videoconferences to ensure everyone can hear and participate.
- Check frequently with remote members during conference calls or videoconferences to see if they have something to add or ask. It is often harder for them to contribute to the conversation when others cannot see their non-verbal communication.

Solution

Use Multiple Channels to Maintain Constant Communication

Make it a priority to use multiple communication methods to clearly communicate with all team members, promote transparency, and foster a sense of inclusion.

	Communication Method	Tips for Successful Use
Organize & Sharing Data	**Shared Online Tools** Dashboards SharePoint OneDrive for Business	❑ Create shared project management documents and use them to post updates, schedules and track issues/concerns. ❑ Develop a best practice to link to information stored on shared drives to better keep track of the latest versions of content.
Inform Others	**E-Mail** Outlook	❑ Think about the purpose for the email (e.g. phone is better for sensitive issues, e-mail is better for a project update). ❑ Have each team member add a profile picture. Seeing a picture of a team member when reading email will help build connections. ❑ Use screenshots to create a visual image and keep the message clear.
Get Quick Answers	**Instant Message (IM)** Skype for Business	❑ Improve collaboration by inviting participants to group chat, connect via video call, or share your screen. ❑ Use the status update feature to post updates about your status and projects for peers to see.
Agree on Decisions	**Conference Calls and Videoconferences** Conference Bridge Blue Jeans Skype for Business Go To Meeting	❑ Assign participants leading roles, and identify ways to make the meeting interactive to keep people's attention. ❑ Share agendas/key action items well in advance. ❑ Create camera presets and/or adjust the camera position to feature the person speaking to encourage more active meetings.
Collaboration	**Telephone**	❑ Encourage team members to talk and bounce ideas off each other. Brainstorming, problem-solving and decision making in real-time builds team cohesion. ❑ Keep in mind that "tone" can be misunderstood when put in written form, so sometime you just need to pick up the phone. ❑ Maintain a "contact list" so everyone knows how to reach each other.
Team Cohesion	**In-Person**	❑ Periodic in-person meetings are important and connect the team in a way that cannot always be captured through technology. ❑ If possible, start projects with in-person meetings. ❑ When conflict is involved, face-to-face is the best option.

Talent Management

UNT System Human Resources

Email: talentmanagement@untsystem.edu

COPYRIGHT AND TRADEMARK STANDARDS

Research and documentation in this guide have been modified and reprinted with permission of CEB.

Source: Manager Guide: Managing Remote Employees 2015 CEB. All rights reserved. HRFR151908PRINT

Source: Guidelines for Remote Management 2010 CEB. All rights reserved. CLC5860024077

Source: Virtual Communication Tips for Employees 2012 CEB. All rights reserved. CLC3020112PRO

Source: Executive Brief: Managing Virtual Teams 2014 CEB. All rights reserved. HRLC143078PRINT