

Remote Management Series Q&A

How do I get my team to buy into going back to the “office” once our companies mandate it to be done. I already know my team is going to come back with “we showed the value we were still while remotely working.” I am confident this won’t even be entertained by the company I work for. I do not want to just give them the reply of, “It is what it is and it’s time to go back”.

Great question. In Part One of the webinar we discussed the idea of positioning this situation as a “NEW” (as in: additional) way instead of a “different” (as in: changed) way of working. If you can continue to position this situation in this way, it should help you to have the flexibility that no promises are being made that this is permanent (one way or the other).

What’s most likely is that some will and some won’t be enthralled with the idea of coming back to the physical office when it’s time. Company policy aside (which it sounds as if you have no control over) what may happen is that if the team does indeed show equal or improved value in this new way of working, that you (or they) can at least make a case for some allowance for the more “traditional” ideas of telecommuting (e.g. a hybrid approach).

What if you prefer working from home? How would you get your employer on your side to allow you to continue working from home?

Ha! Yes, I prefer working from home myself. Always have. You can read a bit of the above answer as it pertains to looking at hybrid situations. However, I think the real case will be made in the work. When you can show the same, or improved levels of work it’s very hard to make a case against it. Now, for many businesses it’s simply a “personality” thing. I find many senior leadership teams/business owners don’t have a good reason for not wanting their teams to work from home other than “it doesn’t feel right.”

And, honestly, it’s hard to argue against that emotion. But I would start by using this time (where there is no choice about it) to start building your long-term case. Track your time meticulously. Track your work, make a journal. Let the data start to speak for itself – and ALSO make the emotional case. (Assuming it shows that you’re as good of an employee (if not better) when working from home.) You may still not succeed in making the case – but you will at least know that the reasons behind it.

First of all, this series has been very helpful! My question relates to the current COVID-19 situation. Many of us have been literally “thrown” into working virtually as a team without any time to strategize and put processes into place before finding ourselves in the scenario. What are the most important things to focus on in the very beginning to get started as a fully virtual team? Keeping in mind we are all still trying to do our day to day jobs and may not have a ton of time to dedicate towards virtual team strategy?

Very glad that it’s been helpful. The most important things are:

- a. Getting your team aligned, onboard, and checking in on their situation. Basically huddling up and seeing where everybody is in this new world that (as you say) they’ve been thrown into. Document that – make note of where there are things that you and/or the company need to address. Is it equipment? Family situation? Regional?
- b. Then, start to build your team charter – what is the operating plan for this new situation? Communicate with your team – and most importantly figure out what the company’s take is on all these things (e.g. technology, continuity planning, etc.). They need the communication on what will be expected.
- c. Start assembling the infrastructure (mostly tech) that you’re going to need to get your current assignments done. Think about it first from what do you need to be immediately productive as a team, second what will you need to facilitate better communication in the short term, and third what do you need to keep people engaged and “happy” for the longer term.

I noticed that an agency time, project, and financial management software platform called Workamajig (Platinum) was not on your list of recommendations. Is there a reason for that?

No. No specific reason. Just not familiar with it. It looks really interesting.

I understand each team has its unique requirements - yet, do you have a favorite project management software?

With the caveat that this is NOT an endorsement per se – but simply the honest answer to the question - we like and use ProWorkflow – and have also used Workfront before.

Do you know if Microsoft Teams/Microsoft has a tool like a Kanban Board? I have discovered the Q&A vs. Chat.

Yes I believe you can, though we have not done it. I believe it also requires you to have Visual Studio.
[Here’s an article on it.](#)

How do you track “uninterrupted” at home?

LOL, what a great question. Yes, I don't even have kids and I understand the challenges of “uninterrupted.” Certainly, the home environment can offer even more interruptions than the office can. The key for me has been to do two things. The first is to schedule my time at home in a way where I know I will have uninterrupted stretches. I communicate this to my family as well – as they are also a “team” that I'm part of. Additionally, when I really need uninterrupted time – I also turn off Skype to “do not disturb” and shut down my email and my chat – and I let my team know that I'm doing this. This is part of our team charter that we can go into “do not disturb” modes where you shouldn't expect an immediate response.

How available does a team leader to be? I struggle with the 24/7. I deeply care about the team and their success.

As a team lead, you need to have boundaries as well. It's incredibly important that when making the “team” charter that you include yourself in that as well. Setting expectations about your own availability, that considers all the time zones your team works in, (and understanding that, because you care so much, you'll probably break your own rule) is paramount.

The short answer is: As long as you set proper expectations, and gently enforce appropriate boundaries, you need not be any more available than your promise is.

My dad had a saying when I was a kid that I think applies here. He used to say, “Your curfew is whatever you'd like it to be (within limits obviously). But, if you're one minute late from what you promise, then you lose that choice.” So – promise what you can – and fulfill it.

With the frequent check-ins, I always start off asking how their day is going, talk about personal things, show how much I care about them. It is a touch base. I also started lunchtime video chats for 30 minutes we can see each other 3 days a week and show our pets - no work conversation.

This is a wonderful way to start off meetings. You should also be clear about your expectations of the meetings. Check-ins are just that - a short check in - where casual conversation is perfect. For meetings where there is an expectation of work taking place, I would limit social chit chat a bit.

We actually END our meetings this way - with pet engagement - as those pets send us down rabbit holes (forgive the pun).

When onboarding a remote new hire, how can you make them feel comfortable with a team who's built relationships in person?

What tips do you have for a new manager coming into a company during this virtual workspace?

Fantastic question. The key is that it will be even more difficult for this new person to make personal connections. So, beyond the logistical challenges (getting them a company laptop, or cell phone, or software setup, etc.) the key will be making her/him feel welcome and useful. Think about a “mentoring” program where you structure one-on-ones with key team members who can walk the new person through your processes, allowing for independent relationships to be formed.

A huge challenge for new managers is, of course, coming up to speed on what's going on. So, in addition to the team greeting (which of course is important), you'll want to schedule one-on-ones with each of the other team members. Think of it (if possible) in concentric circles. The closest in their work proximity first and working outward as is desired to get them connected with the team.

Also – to whatever extent you can – build a welcome kit. This would have all the info they need for a successful first week, first month with the company. This is why (and we'll talk about on Thursday) a Team Charter can be really helpful.



We created a team's page for the company (50ish people) to post fun things and interact like Facebook. Gives that feeling of hallway and “water cooler chat”

Yes, this is a great idea. Another idea is one we've done which is the gratitude news, where a team member posts their gratitude for another team member who has helped them with something.



Any suggestions when you are managing a team remotely (from another office) and they sit together (3 team members) in an office together?

Yes – all the other best-practices apply, of course – but one specific thing is to create open times. We do this a lot on Friday mornings.

We might just open a video chat and all work in the shared space together – with video chat with the other office. We have the feeling that we're ALL in the same room. You can literally just chat if you want, or not – or work collaboratively as if you're in the same room. As part of this process be sure only one playlist is on, and that the audio connection stays open the whole time.

How do you share expectations to make sure your managers are getting the work done, what is the best way to track that?

Well the best way is to set incremental goals. On Thursday's webinar we'll speak a bit about Kanban methodologies and how you might track incremental progress and – more importantly – communicate that progress.

But, one of the keys is breaking down larger projects into smaller sub-projects and tasks and then focusing everyone around completing those tasks in the day. Remember: expectations should be clearly communicated, and when mini-goals are achieved, they're acknowledged, and the project moves on.

As for simple “expectations” setting, as a virtual team lead it will largely fall back into your style of management. For example, I tend to operate from the “I'm not here to bark and be on your shoulder on the path, I'm here to clear the way for the path you want to cut. So, what I expect from my managers is that they will communicate to me how they want to tackle something. My job is then m to clear out the underbrush so that they can meet that goal.

You mentioned not to focus on 9-5 but more on the “work”. How do we do this when staff is non-exempt and therefore paid by the hour???

Right. Great question. It's hard to know your exact situation – but I'll offer this: If it's paid by the hour, but the result is the work product – then you primarily care about cost when it exceeds the estimate.

What we're often afraid of when we shift our focus on the work being done by hourly workers is that somehow they're either working slower than they could (and we're leaving money on the table), or that they will underestimate the effort and it will actually take longer (spending more than we should). But I would argue that the former is our responsibility as leaders, and to get better at it. And the latter is for us to correct, once we understand the work, and people, we are managing.

So, the key is smart resource management. Create an atmosphere of trust for accurate time tracking. In short – if they finish tasks/projects (in a quality way), do you have a way to reward them that encourages accurate time tracking? If you trust and reward for accurate time tracking as a team (and as a company) you'll start to have better data for how long related tasks take for specific individuals – and you can adjust your resource planning accordingly.

If, however, your situation is one of availability and hours (e.g. customer service, receptionists etc.) that is bound by a 9-5 or certain amount of “available hours” - then of course what you're still doing is measuring the quality of work (or quantity of work) done in that particular time.

Either way – your better measurement isn't the length of time spent – it's the quality/quantity of work. Hope that is helpful.

Any tips for coordinating with colleagues laterally in a light, hi-quality way so that teams do not operate in silos?

Yes, one of the best ways is we've seen the cross-functional get together. I used to do this with my sales and marketing teams. We would have Friday afternoon get-togethers (both in person and remotely) where teams would have to share four things (you'll hear more about this on Thursday).

They would share:

1. What's one thing they are celebrating?
2. Who is one person (not on their team) that they are grateful for?
3. What is one thing they think could have gone better (not admitting a failure but rather just something they think could have gone a bit better) to work across the groups?
4. What is one thing they have a question about from the other group?

Then we would have a glass of wine, or some pizza or something and just talk a bit and socialize.

We generally have a very fun and interactive environment. What can we do so employees don't feel disengaged?

The idea of the online social gathering can be really fun. I mentioned it on the webinar today – but creating a social event (doesn't have to be long – literally half an hour is great) where everybody just gets together. If you can plan them in advance you can really do some neat things by shipping things to people in advance. For example, you can deliver everybody (or some) a puzzle, or a costume, or bottles of wine, or a challenge that they have to open (e.g. sing karaoke). Basically, think creatively how you can set a tone of fun, and engaged events.

How do we apply this new paradigm for remote management when managing contractors – not full-time team who often don't have the same benefits as full time staff in terms of training and equipment and usually have their own workflow approaches. Thank you.

Much of the same best practices apply for managing contractors. Yes, they often have their own equipment and work patterns – but, as contractors, much of what they will need to do is to comply with your team's behaviors, patterns, etc.

In this case, you really do need that team charter. If the contractors work with multiple clients, you'll have to modify SOME of what you do to meet their needs (e.g., they give you only Tuesdays to work on your stuff).

But, for the most part, contractors should be working on YOUR terms and your team charter.

As for training, I've often paid for training for a contractor that was going to be with my team for some time.

On the other side, I've also been trained on our client's software, and other things that they need us to use.

However, having said that, (unless you're using something completely weird and out of the box) you as the hiring manager should have every expectation that the contractor will train themselves and be ready and skilled to do the job they are required to do (virtually or otherwise).

For example, as a consultant I've watched online training (on my own time) on just about every virtual meeting solution (Webex, MS Teams, GoToMeeting, Etc..) because my clients use ALL of these tools. It's not a good enough answer to say, "I don't know how to use these things" or "I've never used XYZ so you'll have to work around my needs." Those people don't remain our contractors for very long.

While formal check-ins existed pre-COVID and informal ones happened naturally (stopping by, saying hello) do you recommend more frequent check-ins during this new remote period or do you think that will make people feel pressure/micromanaged?

With more frequent check-ins, the key is that it's NOT always about the status of a task or project. Make sure that you don't become the meeting invite that they hate. Even if it's a 15-minute check-in on a task – make sure that they understand that this is a NEW way of working – and you're not checking UP on them – that you're checking IN on them to just ensure things are flowing smoothly. Start the conversation with something like, "what can I do for you?" If you set the right resonance with them, they'll come to welcome those check-ins.

Do you have advice for creating task tracking for employees when it hasn't been set up previously?

Yes – we'll talk a bit more about this on Thursday but there are some GREAT project management tools that are virtual in nature, as well as simple ways to communicate the status of tasks to the rest of the team.

Do you like Zoom, Skype or gotomeeting better?

They all have their pros and cons – and understanding your requirements (check it out on Thursday) can help you make a better decision. But, generally speaking, Zoom and GoToMeeting are better for online meetings, and Skype is great for quick one on one phone calls – especially mobile. I'm not a fan of Skype for Business (a separate app). But I am a fan of Microsoft Teams.