BEST PRACTICES & RESOURCES FOR
DUKE UNIVERSITY AND HEALTH SYSTEM LEADERS

Leading Virtual Teams

Duke
HUMAN RESOURCES

LEARNING & ORGANIZATION
DEVELOPMENT

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About this Guide

Over the next pages of this guide, you will find resources that will help you prepare to lead a virtual team. You will also find resources via Degreed to accelerate your skill readiness when leading a virtual team.

Tool 1: How to Lead Remote Team Members

Establish Team Norms

If you and your team are now working remotely, the first step is to establish "team norms." These norms are a set of practices that you agree to carry out while everyone is offsite. Consider the following questions:

- Do we meet more frequently as a team and one-to-one? When? How long?
- Does everyone know how to use the Zoom platform for virtual meetings?
- Does everyone know how to turn on their video camera?
- How do we ensure people are present and not multitasking?
- What is the recommended response time to a text or email? Should we use the phone more?
- How will we share sensitive information?
- How frequent will the team will meet as a group and in a one-to-one format?
- What are the resources my team will need to be able to productively work virtually?

There are many more questions to ask, but it's best to set up a conversation with the team to establish all team norm questions that need to be surfaced and answered.

Tip to Consider – Encourage your team members to learn about Zoom:

Help your team learn how to use Zoom. Click here to access video tutorials about Zoom:

- Joining a meeting, click here
- Co-Host controls in a meeting, click here
- Schedule Zoom meetings, click here

Sample team norms for you to consider:

- **Everyone's Voice Matters:** Everyone has a voice when making decisions. That doesn't mean everyone gets a vote, but opinions matter and we want to hear them. Encourage your team members to speak up!

- **Foster Shared Leadership:** We want everyone to feel like they "own" the project. Build effective leadership by always putting your best foot forward, taking on tasks if needed, and being proactive. Sharing leadership is at the core of what makes teams great.

- **Share a Language:** From time to time we may disagree. When we do, we prefer that you use the phrase, "It's my opinion that…" in order to express your disagreement. Other common phrases: "I'm curious to know why…," "Tell me more about that…"

- **Establish a Routine:** Meet at regular intervals. For example: "Every Monday we will have a team check-in at an established time to make sure everyone is on the same page. These meetings will last anywhere between 15-60 minutes depending on the needs of the team. Likewise, we will meet every Friday towards the end of the day to reflect on the week. From time to time we will also engage in one-to-one feedback sessions". Either the team lead or the team member can request this. The point is to clarify anything that isn't working while creating a collaborative solution for your team.

- **Clarify Roles & Processes:** Everyone has a job to do. When there is overlap about who does what and when, or a process isn't working, please bring it to our attention.

- **The Five-Sentence Rule:** Emails should be no longer than five sentences. The email should answer 5 questions: (a) **W**ho is the sender; (b) **W**hat does the sender want; (c) **W**hy is the email sent to the recipient; (d) **W**hy should the person receiving the email respond; and (e) **W**hat's the action they need to take. Keep messages focused so that the recipient will be encouraged to respond quickly.

- **Create a Virtual Water Cooler Chat**: Keep online communication open, using programs such as *Skype for Business*. Team members can use their Skype as a means to have informal conversations. Establish "break times," "lunch," "game time," "check-in times," etc.

- **Hold Virtual Office Hours:** Be online, have open phone lines, and be available at regular times.

- **Answer Emails and Phone Calls:** Emails must be responded to within 24 hours; use text for urgent matters; and no calls between certain hours to make sure team members are not working after the end of their scheduled shift.

Hold Virtual Office Hours

- As a leader, employees need access to you. They need you to lead, not disappear. On top of your regular staff and one-on-one meetings, consider holding office hours on a conference call line or video-sharing from Zoom. Keep in mind: No agenda. No formalities. No hierarchy.

- Consider an open forum for questions to be asked, ideas to be shared, and if needed, fears calmed. Make the forum accessible not just to your team, but however many are under your direction. (Sometimes called skip-level reports.)

Conduct Morning Huddles

- Imagine an employee who has commuted to work for several years. The routine has been consistent. Every morning started the same way. (Their initial conversations with the security guard, the front desk assistant, even the coffee conversations at the break rooms are now gone.)
- To ameliorate any feelings of loneliness, a daily virtual huddle of 10 minutes is recommended. Now that employees are no longer commuting into work, here are some ideas:

THE DAILY VIRTUAL HUDDLE

Practice this:

- Start the day 10 minutes early with a 10-minute pep talk.
- Be open.
- Discuss what you're up to for the day with your meetings, tasks, projects, and so on.
- Publicly recognize someone.
- Provide updates on other organizational projects or changes.
- Share a personal story. It's a perfect opportunity to be human in the face of uncertainty.

Frequent Check-ins

- More than ever, your team members need to feel that you care. The easiest gift you can give is to care.
- You are equipped with a mobile phone, or laptop. Use it.
- Send out-of-the-blue texts, emails and messages to team members asking how they are doing. Maybe use it as an opportunity to thank them or recognize something you've noticed that day or week.

Consider this Tip! You could send them an article, a hilarious meme, or a TED Talk. Receiving unexpected messages from "the boss" ends up becoming an excellent shot of adrenaline for employees. Please don't overdo it, but don't ignore this tactic either.

Discussion Forum

- If you have never led a virtual team, you are likely used to office conversations. They are the moments when team members—including yourself—bump into one another. Maybe it springs an idea. It could remind someone that a task is due. It could unlock a problem. The “water cooler” chat may even create a new network connection that leads to an idea or a new hire. Whatever the case, these collisions are no longer if everyone is working remotely.
- Set up an online discussion forum where employees can rant, rave and discuss anything that pops into their mind. It’s intended to be asynchronous—that means it’s not a live conversation—such that people use it as a means to create some virtual collisions. Let anything go. It’s the place to let loose and network.

Tool 2: Making Remote Collaboration Work for Your Team

You don't need to slow your progress to connect your people to your strategy and create the emotional and intellectual engagement necessary to get results when working virtually. You can quickly connect your team to your rapidly changing strategies regardless of where they're located using the following approaches:

SET CLEAR EXPECTATIONS	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. The more prepared they are, the more efficient the team is.
TREAT REMOTE AS LOCAL	Treat your remote employees like they are local and treat your local people like they are remote. Give remote employees as much access to you as possible. Respond to them as quickly as possible
ENGAGE REGULARLY	Engage your remote team members daily through communication. Use multiple channels to communicate. Plan regularly one-on-one meetings via **Zoom**, also consider using **Skype Chat**, texting or facetime from your phone. You can also create a **"What's Up Chat**" with your team to encourage the team to check-in with each other. The constant interaction and engagement will help your virtual team members feel included in an important aspect of the organization.
SCHEDULE VIDEO-BASED COACHING	With virtual employees, schedule time, and look at one another when you're speaking. Use **Zoom video** feature to meet with your team members. If you do not schedule time or talk with one another, silence becomes very loud and dangerous, as remote team members might end up wondering how they're doing. Ask what's working or needs work? Provide feedback on projects, acknowledge anything that is pressing and needs attention.
TRUST YOUR TEAM	There could be uncertainty about whether or not the work will get completed at the same level as if they were in the office. To prevent this belief, set up work-from-home guidelines, and team norms to work together. Make sure you are available and offer check-in times.
MAKE IT FEEL INCLUSIVE	It is easy to just relegate remote employees to secondary consideration. This can be overcome with virtual meetings and staff partnerships. Do expect there to be a ramp-up period filled with clear steps, expectations and check-ins to ensure the process is fully embraced.
HAVE RELIABLE TOOLS FIRST	If remote employees can't download files, struggle hearing on a conference call, and consistently receive meeting invitations for times when they are still asleep, you have failed to address the basics. Work with the **IT Rapid Response Team** to set up their proper access. Complete the necessary forms to make sure your team have access to their shared folders and internal tools.
STAY FOCUSED ON GOALS, NOT ACTIVITY	It is important to manage expectations and stay focused on goals when embracing a remote workforce. Don't worry as much about what is being done. Instead, concentrate on what is being accomplished. If we are meeting our goals, then great. If not, we need to look into the situation further. It is all about accomplishment, not activity.

Tool 3: Engaging Your Virtual Team

Many leaders find it difficult to figure out how to engage a virtual team. You may feel like you have no control over the situation or find that gaining a trust level with a remote team can be a bit of a challenge. Yet, it is the way of the future of the workplace, and leaders need to adapt to make the situation work for everyone involved. Here are some ideas to help you boost your team's engagement levels while working remotely.

BE INTENTIONAL	• Create a remote team atmosphere of engagement and genuine connection. • Be intentional in preparing and orientating employees for the remote workforce culture. • Establish clear expectations. Make each team meeting count with intentional purpose and opportunities to engage and contribute in a variety of ways. Intentionality is an essential practice, particularly when we cannot readily "see" our people.
CREATE A COMMUNICATION STRATEGY	• Managing a productive team remotely begins with a strategy for communication. Arrange for the appropriate number of weekly formal "report-ins." • Set guidelines about daily needs. Some people work better with a shopping list of questions and thoughts while others like a trickle. An understanding of what is urgent will further mitigate inefficiency, allowing ultimate productivity.
AVOID MULTI - TASKING	• Figure out how to avoid multi-tasking. Video conferences instead of phone conferences work well. • Encourage people to stay in working mode and off email back-and-forth as much as is reasonable. • Email trails with extensive "reply all" can be stifling on productivity. This tends to peak on Fridays as people are trying to move work off their plate. Send a note to whoever needs it, but send it early in the day.
CONNECT THEIR GOALS WITH YOURS	• Take a personal interest in your team's learning and life goals. In your virtual meetings, take a moment to connect their interests to the goals of what you are trying to accomplish. This will increase engagement and performance.
USE TECHNOLOGY TO BUILD COMMUNITY	• Building community is important to developing an engaged remote employee. • Use technology to create dedicated spaces for celebrating special days (e.g. birthdays), company milestones (e.g., months or years of service), as well as community recognition. • Being intentional about creating community helps develop a corporate culture that inspires connection, which can result in increased productivity.
ESTABLISH CLOSE BONDS, HELP AND SUPPORT FREQUENTLY	• Empathize and appreciate their life by discussing family, commonalities and shared beliefs. • On the management end, check in frequently (daily) using collaboration tools, shared docs and spreadsheets, phone calls, chat, and video to invest in the relationship. • Show you are supportive of their success by using inquiry to help them achieve their goals rather than check on their progress.

Tool 4: Ensuring Your Virtual Team Is Productive

One of the biggest questions is whether or not virtual teams will be able to be productive despite the difficulties imposed by distance and isolation. Fortunately, there are a number of proven strategies that can help ensure virtual team productivity:

Use Your Skype for Business Virtual Chat and Virtual Meetings Using Zoom

- Fortunately, collaborative messaging tools like **Skype for Business** allow organizations to set up virtual chat rooms for the workplace.
- In addition to recreating the "water cooler talk" environment of a physical office, **Skype for Business** will also allow you to set up dedicated channel for different projects and departments, making it easy for team members to communicate instantly.
- Messaging tools help team members to be more proactive, reaching out to others for ideas and suggestions as well as simply sharing their thoughts. Team leaders can use messaging to encourage people to connect and interact, either by organizing chats or using quick polls and games to build relationships.

Avoid Communication Overload

- While communication is vital for remote teams, information overload can quickly become a problem. Endless emails, project management system updates, and non-stop messages combine to create a backlog of correspondence for people to sort through.
- With all the different ways of communicating with team members, it's easy for people to become overwhelmed. Virtual employees can find themselves engaged in a dozen conversations at one time.
- When working remotely, it's critical that team members let others know their preferred means of communication and make it clear when they're busy or otherwise unavailable.
- Information needs to be shared freely in virtual teams, but no one should be forced to sift through messages that don't apply to them or their work.
- Keeping lines of communication as clean as possible ensures that team members will be focused on their work rather than following every conversation taking place throughout the organization.

Consider Your Collaborative Tools

- With so many people contributing to a given project at any time in a virtual team, it's critical that some form of collaborative tools are set up to facilitate that workflow.
- Collaborative tools like **Microsoft Teams** and **SharePoint** make it possible for virtual team members to work on projects simultaneously, as if they were sitting right next to each other. Combined with video conferencing and screen sharing technology, virtual team members can come close to being in the same room.

Establish Standardized Work Processes

- While virtual team members will all have their own set of work habits, the team must have a standardized approach to make decisions, share information, and solve problems.
- Effective work systems also enhance productivity because they provide consistency. Team members don't have to waste time figuring out the best way to do something because a system is already in place.
- Implementing standardized processes ensures that everyone's work is contributing to the team's performance.

Measure Performance

- Accountability is always a concern with any workplace, but especially so for virtual teams. With their ability to set their own schedules and work independently, virtual team members can very easily end up not making the most of their time.
- While some remote employees can function very effectively with little to no supervision, many people need some level of oversight to hold them accountable for their work.
- The team needs to establish clear expectations for what work needs to be done, who will complete it, and when it will be due.
- Define with your direct leader how you would like to track work hours and performance expectations. This will serve to hold everyone accountable for their responsibilities. This information can be incorporated into performance assessments to determine how efficiently team members utilize their time and provide insights that may enhance their productivity.

Be Flexible… Up to a Point

- Working with a virtual team requires leaders and organizations to be flexible. In many cases. When employees share a common time zone, they may favor working at different times of the day when they feel they can be more productive. Since it's not necessary for all team members to be working at the same time, it makes sense for the team to be flexible enough to accommodate everyone's needs.
- Flexibility should not come at the expense of productivity. Since the work that one person does may have an impact or be dependent upon another person's work, virtual teams must be able to coordinate tasks to ensure that they're completed on time.
- It could be beneficial to have all or most of the team working at the same time for at least a portion of the day in case important information needs to be communicated to everyone.

Remember the Big Picture

- Working in isolation can often cause remote employees to lose sight of the team's overall goals. It becomes easy to focus on a specific task sitting before them rather than thinking about how their work affects the rest of the team. For this reason, it often falls to leadership to reiterate the reason for the team existing in the first place.
- Communicating goals and highlighting accomplishments that push the team closer to those objectives are important not just for raising awareness, but also for reminding team members that they are there to support one another.
- Although they're located in different places, the team members still share a common purpose. Making an effort to create a true team environment that provides a sense of identity can help to boost engagement and productivity.
- Regular virtual meetings, as well as the occasional in-person meeting (if possible), remind team members that they are all working together to accomplish something meaningful.
- Take deliberate steps to reinforce the teams' sense of purpose and their commitment to one another's success is one of the most important tasks a virtual leader must undertake.

Tool 5: Conducting Team Virtual Meetings

Virtual meetings don't have to be a waste of time. In fact, they can be more valuable than traditional face-to-face meetings. Beyond the fact that they're inexpensive ways to get people together, they're also great opportunities to build engagement, trust and candor amongst a teams. Your recommended tool is Zoom!

Before the Meeting

Turn the video on.

- Since everyone on the call is separated by distance, the best thing you can do to make everyone at least feel like they're in the same room is to use video.
- There are many options to choose from, such as **Zoom** and **Skype fro Business**. Video makes people feel more engaged because it allows team members to see each other's emotions and reactions, which immediately humanizes the room. No longer are they just voices on a phone line; they're the faces of your co-workers together, interacting.
- Without video, you'll never know if the dead silence in a virtual meeting is happening because somebody is not paying attention, because he's rolling his eyes in exasperation or nodding his head in agreement. Facial expressions matter.

Cut out report-outs.

- Too many meetings, virtual and otherwise, are reminiscent of a bunch of fifth graders reading to each other around the table – and that's a waste of the valuable time and opportunity of having people in a room together.
- The solution is to send out a simple half-page in advance to report on key agenda items – and then only spend time on it in the meeting if people need to ask questions or want to comment.

Come prepared with the team's opinions.

- Not only do you need to do your pre-reads, but once you see the agenda, make sure you discuss with your team what is going to be covered – that is, do your own due-diligence.
- What happens all too often is that people get on virtual calls with a point of view, but because they haven't done any real homework before the call, they end up reversing their opinions once the call has ended and they've learned new information that they could have easily obtained in advance.
- If there's a topic that seems to have interdependencies with people who work in our location, get their input ahead of time so you're best representing those constituents in the meeting.

During the Meeting

Connect people.

- People perform better when they are comfortable with each other, which affords a greater degree of candor and mutual interest. Your job as a leader, particularly when people may not know each other, is to make them feel connected so you can have a productive meeting.
- Do a personal-professional check-in at the beginning of each meeting. Have team members take one minute and go around to talk about what's going on in their lives personally and professionally.
- Remind everyone to respect each other by not interrupting and to only say what they're comfortable sharing with the group.

Encourage collaborative problem solving.

- A collaborative problem-solving session replaces the standard "report-outs" that can weigh meetings down. It's when the leader raises a topic for group discussion and the team works together – and sees each other as sources of advice – to unearth information and viewpoints, and to generate fresh ideas in response to business challenges.

Give each person time on the agenda.

- Along with collaborative problem solving, giving each person time on the agenda fosters greater collaboration and helps get input from all the team members.
- In advance of the session, have team members write up an issue they've been struggling with and bring it to the table, one at a time.
- Each team member then gets five minutes on the agenda to discuss his or her issue.
- The group then goes around the meeting, so everyone gets a chance to either ask a question about it or pass. After the team member answers everyone's questions, people then get an opportunity to offer advice in the "I might suggest" format, or pass. Then, you move on to the next issue. It's a very effective use of a collaboration technique that could easily be managed in a virtual environment.

Kill mute.

- In-person meetings follow social norms. For example, you don't get up and walk around the room, not paying attention.
- Virtual meetings are no different. You don't go on mute and leave the room to get something. In a virtual meeting, you shouldn't press mute and respond to your emails, killing any potential for lively discussion, shared laughter and creativity.

Ban multitasking.

- Multitasking was once thought of as a way to get many things done at once, but it's now understood as a way to do many things poorly.
- Managers should set a firm policy that multitasking is unacceptable, as it's important for everyone to be mentally present.
- Use video to eliminate multitasking, because your colleagues can see you.
- Have the meeting leader call on people to share their thoughts. Since no one likes to be caught off-guard, they'll be more apt to pay attention.
- Give people different tasks in the meeting, rotated regularly.

After the Meeting

Formalize the water cooler.

- Have you ever been in a meeting, and just when it ends, everybody walks out and vents their frustrations next to the water cooler?
- Make the water cooler conversation the formal ending of the virtual meeting, instead. Five to 10 minutes before the meeting ends, do what everybody would've done after the physical meeting – but do it in the meeting and make sure it's transparent and conscious, processing people's real feelings.
- Have everyone go around and say what they would've done differently in the meeting. This is the time when you say what you disagreed with, what you're challenged with, what you're concerned about, what you didn't like, etc.
- All of the water-cooler-type conversation happens right now, or it never happens again. And if does happen later, you're violating the ethics of the team.

Most importantly in virtual meetings, civility and respect must be the norm.

- There have to be inalienable, ethical rules that you follow before, during and after a virtual meeting for it to be truly successful. And that means adhering to two fundamental principles: Be respectful of others' time and be present.
- Failing to do so steals precious hours from the team that can never be recovered.
- Co-located teams have enough problems building candor and trust; teams separated by distance really need to have great meetings to build these connections.

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How can you generate teamwork in cyberspace? Click here

The experts recommend building connection, communication, culture and mutual accountability.

Your Online Resources:

Scan the QR Codes or click on the links to access the Degreed pathways. There you will find articles, videos, getAbstract book summaries and other resources for you and your team members.

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“To master the virtual equation and make all the elements work together, you have to become the connector. In fact, your greatest role as a virtual manager is to link the various parts of his/her team to accomplish the goals that lead to its formation in the first place. You may need to shift gears, perform ream tune-ups, realign, and refuel your team's energy along the way.”

— Yael Zofi, A Manager's Guide to Virtual Teams