

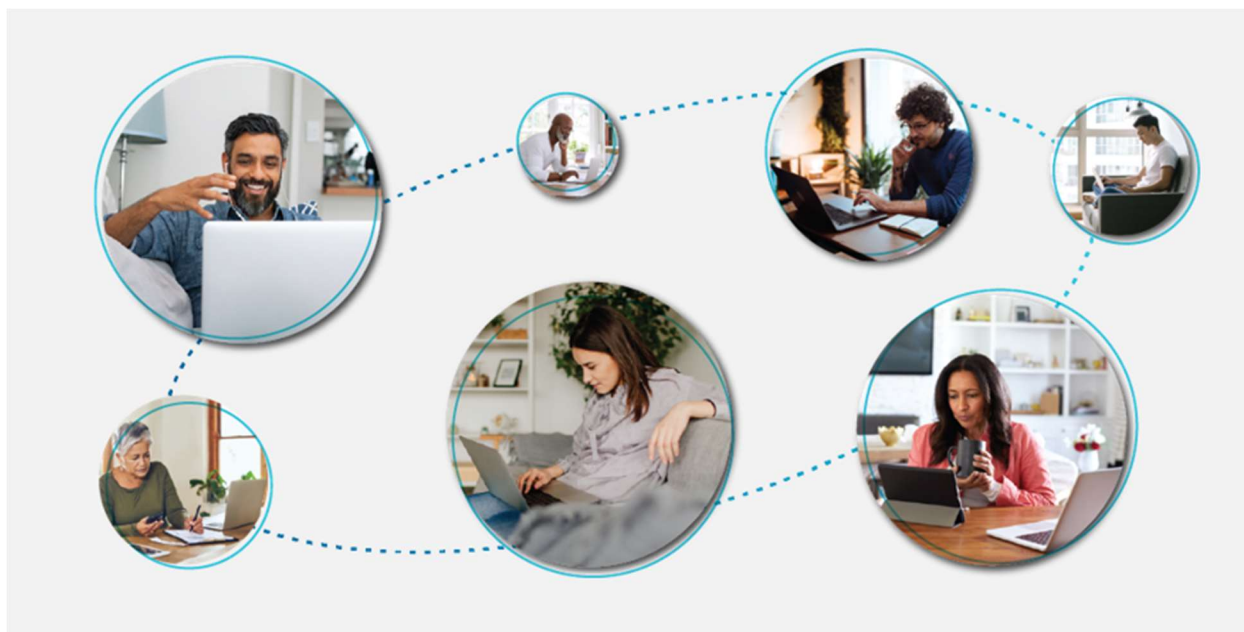


# LEADING VIRTUAL TEAMS



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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.

# LEADING VIRTUAL TEAMS



## 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:

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| <ul style="list-style-type: none"><li>• Do we meet more frequently as a team and one-to-one? When? How long?</li><li>• Does everyone know how to use the Zoom platform for virtual meetings?</li><li>• Does everyone know how to turn on their video camera?</li><li>• How do we ensure people are present and not multitasking?</li></ul> | <ul style="list-style-type: none"><li>• What is the recommended response time to a text or email? Should we use the phone more?</li><li>• How will we share sensitive information?</li><li>• How frequent will the team will meet as a group and in a one-to-one format?</li><li>• What are the resources my team will need to be able to productively work virtually?</li></ul> |
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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:

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- **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!
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- **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.
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- **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..."
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- **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.
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- **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.
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- **The Five-Sentence Rule:** Emails should be no longer than five sentences. The email should answer 5 questions: (a) **Who** is the sender; (b) **What** does the sender want; (c) **Why** is the email sent to the recipient; (d) **Why** should the person receiving the email respond; and (e) **What'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 *Microsoft Teams*. Team members can use their Microsoft Teams as a means to have informal conversations. Establish "break times," "lunch," "game time," "check-in times," etc.
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- **Hold Virtual Office Hours:** Be online, have open phone lines, and be available at regular times.
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- **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.
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## 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.

- 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.

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## 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:

<b>SET CLEAR EXPECTATIONS</b>	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.
<b>TREAT REMOTE AS LOCAL</b>	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
<b>ENGAGE REGULARLY</b>	Engage your remote team members daily through communication. Use multiple channels to communicate. Plan regularly one-on-one meetings via <b>Zoom</b> , also consider using <b>Microsoft Teams</b> , texting or facetime from your phone. You can also create a " <b>What's Up Chat</b> " 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.
<b>SCHEDULE VIDEO-BASED COACHING</b>	With virtual employees, schedule time, and look at one another when you're speaking. Use <b>Zoom video</b> 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.
<b>TRUST YOUR TEAM</b>	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.
<b>MAKE IT FEEL INCLUSIVE</b>	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.
<b>HAVE RELIABLE TOOLS FIRST</b>	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 <b>Office of Information Technology</b> to set up their proper access. Complete the necessary forms to make sure your team have access to their shared folders and internal tools.
<b>STAY FOCUSED ON GOALS, NOT ACTIVITY</b>	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.

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## 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.

<b>BE INTENTIONAL</b>	<ul style="list-style-type: none"> <li>• Create a remote team atmosphere of engagement and genuine connection.</li> <li>• Be intentional in preparing and orientating employees for the remote workforce culture.</li> <li>• 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.</li> </ul>
<b>CREATE A COMMUNICATION STRATEGY</b>	<ul style="list-style-type: none"> <li>• Managing a productive team remotely begins with a strategy for communication. Arrange for the appropriate number of weekly formal "report-ins."</li> <li>• 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.</li> </ul>
<b>AVOID MULTI-TASKING</b>	<ul style="list-style-type: none"> <li>• Figure out how to avoid multi-tasking. Video conferences instead of phone conferences work well.</li> <li>• Encourage people to stay in working mode and off email back-and-forth as much as is reasonable.</li> <li>• 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.</li> </ul>
<b>CONNECT THEIR GOALS WITH YOURS</b>	<ul style="list-style-type: none"> <li>• 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.</li> </ul>
<b>USE TECHNOLOGY TO BUILD COMMUNITY</b>	<ul style="list-style-type: none"> <li>• Building community is important to developing an engaged remote employee.</li> <li>• 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.</li> <li>• Being intentional about creating community helps develop a corporate culture that inspires connection, which can result in increased productivity.</li> </ul>
<b>ESTABLISH CLOSE BONDS, HELP AND SUPPORT FREQUENTLY</b>	<ul style="list-style-type: none"> <li>• Empathize and appreciate their life by discussing family, commonalities and shared beliefs.</li> <li>• 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.</li> <li>• Show you are supportive of their success by using inquiry to help them achieve their goals rather than check on their progress.</li> </ul>





- 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.









## 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 it 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.

# LEADING VIRTUAL TEAMS



## 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.



<a href="#"><u>Leading Virtual Teams</u></a>	  To access this pathway, click <a href="#">here</a>
<a href="#"><u>How To Transition To A Remote Workforce</u></a>	  To access this pathway, click <a href="#">here</a>
<a href="#"><u>Virtual Collaboration in Organizations</u></a>	  To access this pathway, click <a href="#">here</a>

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