Best Practices for Leading a Virtual Team

Supporting the system during COVID-19

April 1, 2020
Presented by Jennifer Phillips and Aimee Julian, PhD
Illinois Center for Specialized Professional Support

- Phone lines will be muted for better sound quality

- Please 'introduce' yourself by typing your name in the chat box

- Please use question box to ask questions

What We Will Cover Today

1. Best practices that you can put to work immediately

2. Quick overview of technology to enable remote team management

3. Time for your questions

Webinars in this series: Thriving in a Virtual Work Place
- Best Practices for Remote Work, March 25
- Bringing Your Best Self to the Virtual Workplace, April 8

Resources are available on the ICSPS website.

Challenges With Our New Normal

- Lack of face-to-face supervision
- Lack of access to information
- Lack of right tech equipment
- Lack of - or spotty WiFi (or competing with partner/children)
- Work plans aren't as relevant without face-to-face interaction
- Social isolation and anxiety
- Distractions at home
- Young children at home needing supervision

Secret to leading a virtual team?

Humor helps but it's not the answer...

Answer: Being a Great Manager

💡 <mark>REMEMBER:</mark>

Good management can happen anywhere

The essence of good management doesn't change when working remotely

Management Essentials:

- Set the tone
- Give clear expectations
- Communicate effectively and often
- Equip your staff to success;
- Coach staff through challenges; and
- Ask for and give feedback

Digital Leadership Add-ons:

- Transformative vision
- Forward-looking perspective
- Digital literacy
- Adaptability

How Digital Leadership Is(n't) Different, **MIT Sloan Management Review**

Best Practices for Leading Teams Virtually

Use your EQ: Emotional Intelligence

Strategically communicate with your team

Agree on guidelines for remote work

Create a virtual work plan that works for your team structure

Assess your team's strengths & weaknesses and redeploy as needed

Make work visible and create clear measures of productivity

Address technology issues for your team

Have everyone brush up on their technology skills

Maintain a sense of culture and camaraderie

Emotional Intelligence 101

This is not the time to be a toxic leader. Reach deep and cultivate your emotional intelligence (EQ).

Daniel Goleman, author of *Leadership: The Power of Emotional Intelligence,* articulates the four EQ superpowers that every leader needs:

- self-awareness
- self-management
- empathy and social awareness
- relationship management

Boost Your Emotional Intelligence with These 3 Questions, **Harvard Business Review**
Five Rules for Leading in a Digital World, **MIT Sloan Management Review**
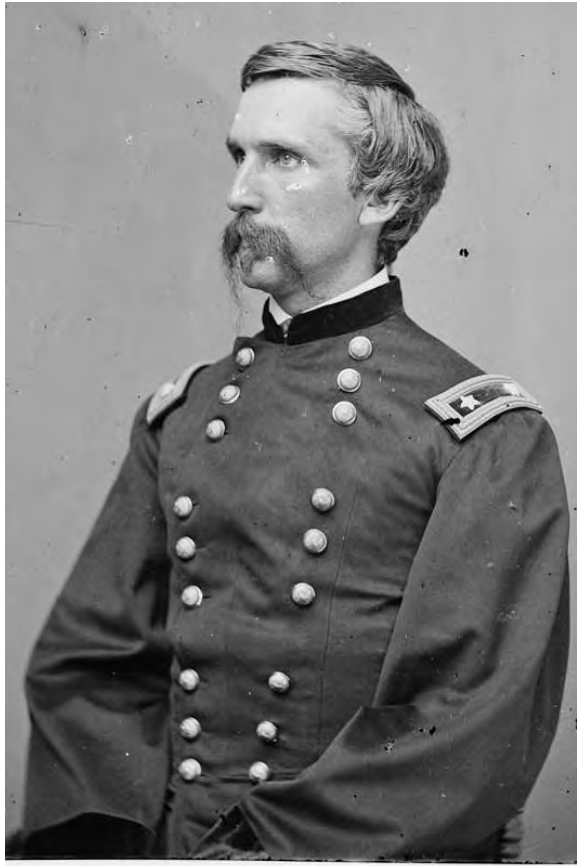
Strategically Communicate with Your Team

- Set the tone

- Create remote work communication protocols

- Don't conflate brief communications and clear communications

- Don't bombard your team with messages; learn how to use the right remote work communication tools

How to Communicate Effectively If Your Team Is Remote, Harvard Business Review

Set the Tone and Bring Your Team Along with You

THE LEADERSHIP MOMENT

THE SPEECH	THE MESSAGE
I've been told that if you don't come I can shoot you.	I hold the ultimate stick.
Well, you know I won't do that. Not Maine men.	I will not resort to force because of our common heritage.
We're down below half strength and we need you, no doubt about that.	I need you.
Many of us came . . . because it was the right thing to do.	Our personal calling is noble.
We're an army going out to set other men free.	Our cause is just.
What we're fighting for, in the end, is each other.	We are joined together for one another.
I think if we lose this fight the war will be over.	The challenge is critical.
If you choose to come with us, I'll be personally grateful.	I will value your support.

Colonel Joshua Lawrence Chamberlin
20th Regiment of Infantry, Maine Volunteers
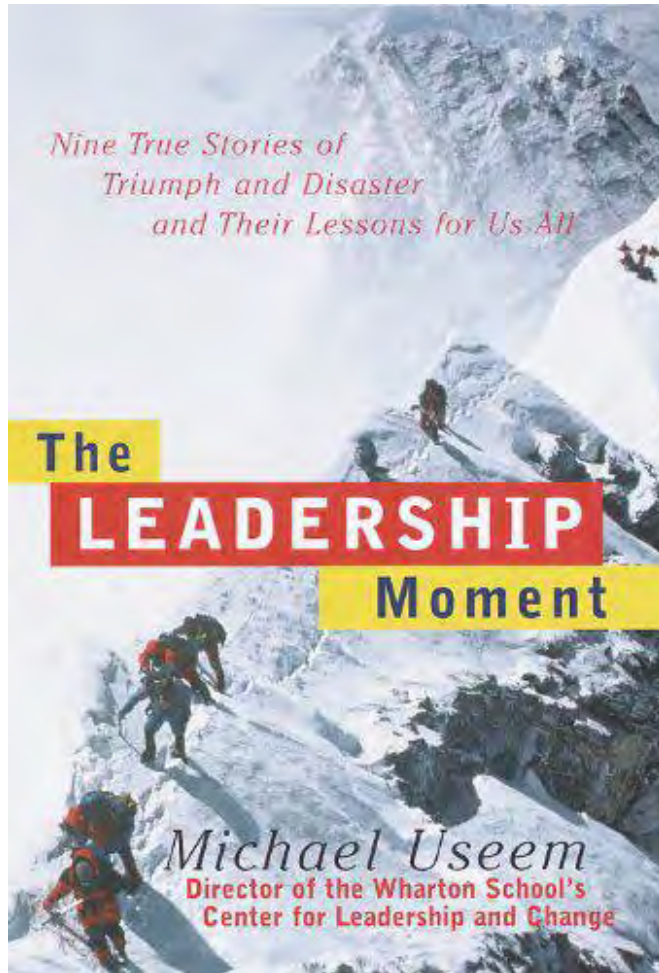
Here's a Book Recommendation (*for all the time you probably don't have*)
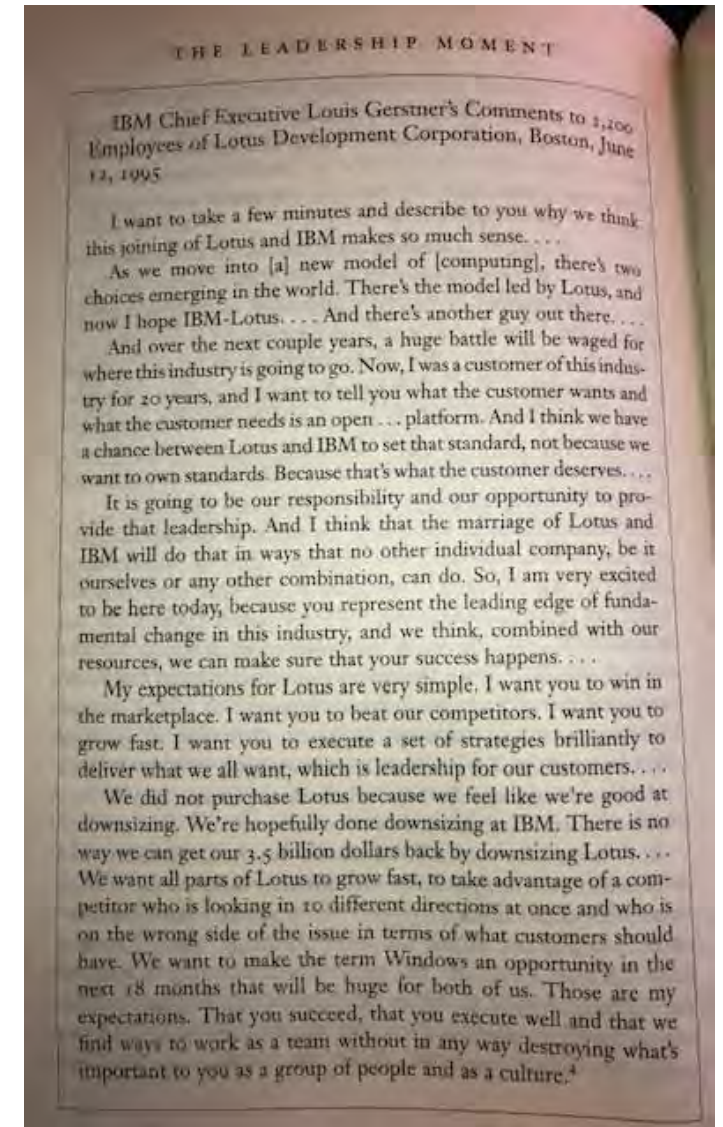
Lou Gerstner, former IBM CEO, followed Chamberlin's outline when speaking to newly acquired Lotus employees

What's Your Message to Your Team?

First, you should have a group conversation about the new state of affairs. Say, "Hey, folks, it's a different world. We don't know how long this is going to last. But I want to make sure you all feel that you have what you need."

This should be followed by a team launch to jump-start this new way of working.

Figure out: How often should we communicate? Should it be video, phone, or Slack/Microsoft Teams/Yammer (Cisco)? If you're not using one of those social media systems, should you? What's the best way for us to work together?

You've got to help people understand how to do remote work and give them confidence that it will work.

How will you convey to your team that you trust them?

How will you make sure that team members constantly feel like they know what's going on?

You need to communicate what's happening at the organizational level because, when they're at home, they feel like they've been extracted from the mothership. They wonder what's happening at the company, with clients, and with common objectives. The communication around those are extremely important. So you're emailing more, sharing more.

Get Your Virtual Team Off to a Fast Start, **Harvard Business Review**

Clearly Conveyed Communication Norms Make a Difference

Consider creating a **team charter** that describes how you will work together remotely – think about establishing "rules of engagement"

Specify technologies the team will or won't use for different task	Standard formats and etiquette for written communications	Plans for keeping everyone in sync	Expected time to respond to requests	Types of communication that should always be shared with everyone
• **EXAMPLE:** "Don't use email to discuss sensitive interpersonal issues"	• **EXAMPLE:** "Highlight or bold to emphasize action items in emails"	• **EXAMPLE:** "Let the team know ahead of time if a commitment or deadline cannot be met"	• **EXAMPLE:** "Acknowledge receipt within 24 hours"	• **EXAMPLE:** "Use the 'would you want to know?' rule of thumb"

Five Ways to Improve Communication in Virtual Teams, **MIT Sloan Management Review**

Remote Work Communication Tools

Email	For quick interactions. You can also replace most email communication with other tools such as project management tools or chat programs.
Chat programs	Are great for quick instant messages where you need real-time interaction. Examples: Microsoft Teams, Slack, Google Hangouts Chat, Cisco Webex Teams.
Video chat	Some types of communication should only be handled over with voice. Any kind of emotional issue such as performance problems should be handled over the phone. Video chat would be even better as it gives you more visual cues of what is going on with the other person. It can feel isolating and abnormal to chat only with text and adding video makes your remote company feel more "real".
VoIP	Virtual phone systems centered on cloud technology that allow for quick and easy calling, messaging, and task management. Also typically come equipped with dozens of call functions to make the calling experience as smooth as possible.
Project management tools	These keep your communication a lot more organized and so that you are able to reference it and refer to it later on. Or perhaps when people join the company they can see the previous discussion points. Examples: Trello, Asana, Basecamp.
Creating a short video	It's very easy to create a video of yourself on YouTube using your webcam, or using a screen capture tool such as Jing.

impacting educational equity

Illinois Center for Specialized Professional Support,
Illinois State University, College of Education

Understand What Tool, When, & How to Use It

Communication channels are crucial for remote working

Channel	Best for…
1:1 Call / VC	· Individual catch-ups and building relationships · Discussing sensitive and difficult topics
Video conference	· Problem solving and co-creation using shared screen or whiteboard · Weekly planning and review sessions · Decision meetings · Workshops and trainings · Team talks and retrospectives
Chat	· Process syndication · Urgent questions and seeking guidance · Keeping up to date in real-time · Social team talk
Video captures & voice notes	· Showcasing and explaining work · Guidance to the team from managers with limited time · Debriefs after meetings that some may have missed
eMail	· Updates and status to large groups of people · Formal communication inside and outside the company

Communication considerations

Time to create vs time to process information

Synchronous vs Asynchronous

1:1, 1:N, or N:N

Structured vs stream

Formal vs chatty

Urgent vs important

Visual vs spoken vs written vs non-verbal clues

Source: McKinsey & Company analysis

A blueprint for remote working: Lessons from China, McKinsey Digital

Five Ways to Improve Communication in Virtual Teams

Match the technology to the task.	Make intentions clear.	Stay in sync.	Be responsive and supportive.	Be open and inclusive.
• So carefully consider your goals. Use leaner, text-based media such as email, chat, and bulletin boards when pushing information in one direction — for instance, when circulating routine information and plans, sharing ideas, and collecting simple data. Web conferencing and videoconferencing are richer, more interactive tools better suited to complex tasks such as problem-solving and negotiation, which require squaring different ideas and perspectives.	• Review important messages before sending them to make sure you have struck the right tone. Err on the side of pumping up the positivity or using emojis to convey emotion to mitigate the tendency toward negative interpretation. Go out of your way to emphasize important information, highlighting parts of the message that require attention, using "response requested" in the subject line, or separating requests into multiple emails to increase the salience of each one.	• Your team can overcome these challenges by prioritizing keeping everyone in the loop. Maintain regular communication with team members, and avoid lengthy silences. Proactively share information about your local situation, including unexpected emergencies, time demands, and priorities. Acknowledge receipt of important messages, even if immediate action isn't possible. And give people the benefit of the doubt. Seek clarification to better understand others' behaviors or intentions before jumping to conclusions.	• To help develop trust on a virtual team, encourage everyone to respond promptly to requests from their teammates, take the time to provide substantive feedback, proactively suggest solutions to problems the team is facing, and maintain a positive and supportive tone in communications.	• To reap the benefits of your virtual team's diversity, focus on communicating as openly and inclusively as possible. Involve the whole team in important communications and decisions. Actively solicit perspectives and viewpoints from all team members, especially those in other locations, to demonstrate openness to different ideas and approaches to a task. And when working to resolve differences of opinion, seek to integrate the best of the team's ideas.

Agree on Guidelines for Remote Work

Make sure you are communicating the guidelines for remote work for your team.

Rally your team with a remote 'mission statement', which can reiterate common vision, goals, transparency, and trust. Use keywords that motivate your team: *coherent, productive and motivated*

Your organization likely already has an HR policy handbook in place. Consider creating a remote version or a remote code of conduct so everyone is on the same page.

Possible categories:
- Values/Mission
- Touchpoint meetings: establish structured check-ins and decide frequency
- Expected behaviors
- Unacceptable behaviors
- Reporting a problem
- Taking care of each other
- Committing to improvement

[Code of Conduct](), **Vox Media**

Create a Virtual Work Plan that Works with Your Team Structure

- Whole world is in triage mode and is working to figure this out.

- What kind of team(s) you lead?

- Different types of teams (multi-site team, team with satellite workers, distributed team, small team, large team) will require different management strategies.

- Focus on what you and your team *can* do. Reprioritize during this time.

- Create scenarios and contingencies for immediate term and longer term goals, activities, and outcomes.

Assess Staff Strengths and Weaknesses

- Depending on team members' capacities and/or technology limitations, get creative with work that can be done without much technology or work that can be done but wasn't as high a priority before COVID-19

- Talk to your staff; find out what's working and what's not: Ask: "What can I do to make sure that this sudden and quick transition is working for you?"

- Work with your team to solve challenges

- Ask people how they think they could do the work differently

Make Work Visible and Create Clear Measures of Productivity

- Establish clear expectations and a regular cadence for team touchpoints.

- Make sure your team knows how their performance will be measured and your expectations for working and communicating virtually.

- Use key indicators of success in job to think about clear and simple metrics for work done. This might be shared work plans, mini weekly reports, group reports, touchpoint meetings.

- Consider asking your staff to use their calendars to time block as a metric for work done.

- Time worked is not necessarily a useful measure of work accomplished.

I asked experts to analyze my to-do lists. This is what they found, **Fast Company**
Could Time-Blocking Replace your To-Do List?, **Fast Company**
This is the Time Management Hack that Helped Me Double My Income, **Fast Company**

Examples of Types of Meeting Check Ins

- A daily meeting within each team (quick, less than 10 minutes just to say hi and feel like you are connecting and to make sure there is nothing blocking each person from achieving their goals).

- A weekly meeting within a team or a weekly one-on-one meeting between a team leader and each person on their team. This weekly meeting is a way to store up issues and minimize the back and forth email that takes place during the week and handle it all in one meeting.

- A weekly all-hands meeting for the entire company. This should be short, usually 10 minutes to feel like your all part of the same team and to get on the same page.

- *Make sure you know when you team is working but allow some flexibility. This is especially important for parents with children who are home from school.*

Address Technology Issues

- Be mindful of first-time remote workers. This is a challenging time for many employees, especially those who are working from home for the first time. Stay in close communication with your remote workers and make sure they have the tools they need to be effective while working from home.

- How do you make sure that they have access to the resources they need to do work? Direct managers have to very quickly ensure that every employee has full access, so no one feels left behind.

- Security protocols from your organization can hamper your work

- People migrating to laptops might have new challenges with different hardware

- Downloading software can be difficult if restrictions exist

- What do you need to order for your staff so they have what they need

- Managing with kids and spouses/partners who are also online for school or work

Have Everyone Brush Up on Their Technology Skills

- This is a good time for technology professional development for anyone who is not well-versed in online platforms. There are countless online and video resources to help your staff get up to speed.

- Be resourceful.

- Be a proactive solution finder not just problem identifier. Encourage your staff to adopt the same attitude.

- Each one, teach one. Delegate learning a new skill to a team member and ask them to be the new resident expert and help teach others.

Technologies to Facilitate Remote Work

- Office Essentials
- File Sharing
- Virtual Meetings
- Instant Messaging/Chat
- Project Management Platforms

Visit Illinois Center for Specialized Professional Support at https://icsps.illinoisstate.edu/ for Technologies to Facilitate Remote Work Tip Sheet
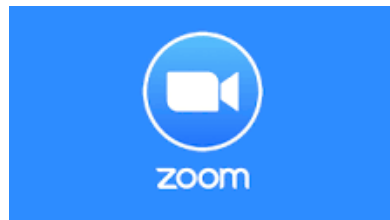
Free or Low-Cost Remote Work Technologies

These 5 Tech Companies Are Providing Free Remote Working Tools During the Coronavirus Outbreak

As many companies ask employees to stay home, these five are making their services available to others.

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By Jason Aten *Tech columnist* 🐦 @jasonaten

Aten, Jason. "These 5 Tech Companies Are Providing Free Remote Working Tools During the Coronavirus Outbreak." Inc.com, Inc., 5 Mar. 2020, www.inc.com/jason-aten/these-5-tech-companies-are-providing-free-remote-working-tools-during-coronavirus-outbreak.html.

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Free or Low Cost Internet

Can I get no-cost internet during the COVID-19 outbreak?

You can get no-cost, in-home internet for up to two months during the new coronavirus (COVID-19) outbreak if you qualify for certain low-income internet programs or have a student living in your household. Here's a list of the internet providers offering limited, no-cost internet services during the outbreak.

Provider	Service	Who qualifies	Offer	How to get it
Altice Optimum	Internet up to 30 Mbps	New customers with K–12 or college students in household	No cost for first 60 days	Call 1-866-200-9522
Altice Suddenlink	Internet up to 30 Mbps	New customers with K–12 or college students in household	No cost for first 60 days	Call 1-888-633-0030
Charter Spectrum	Internet up to 100 Mbps and no installation fees	New customers with K–12 or college students in household	No cost for first 60 days	Call 1-844-488-8395
Comcast Xfinity	Internet Essentials package with speeds up to 25 Mbps	New Xfinity customers who are eligible to public assistance programs	No cost for first 60 days ($9.95/mo. after)	Learn more
Cox	Internet up to 15 Mbps through Connect2Compete program	New Cox customers with at least one K–12 student in household who qualifies for public assistance programs	No cost for first 30 days ($9.95/mo. after)	Learn more

https://www.highspeedinternet.com/resources/internet-guide-during-coronavirus-outbreak#no-cost-internet

Virtual Meeting Options

Zoom: Zoom offers an easy, reliable cloud platform for video and audio conferencing, collaboration, chat, and webinars across mobile devices, desktops, telephones, and room systems.

Google Hangouts: Google Hangouts is a unified communications service that enables text, voice, or video chats, either one-on-one or in a group. Hangouts is built into Google+, Gmail, YouTube, and Google Voice, plus there's Hangouts apps for iOS, Android, and the web.

Cisco Webex: Cisco Webex offers a range of video conferencing, webinars, team collaboration (chat), cloud file sharing, and more.

Go-To-Meeting: GoToMeeting is a web-hosted service created and marketed by LogMeIn. It is an online meeting, desktop sharing, and video conferencing software package that enables the user to meet with other computer users, customers, clients or colleagues via the Internet in real time.

Best Practices for Virtual Meetings

- Provide attendees with the tools they'll need:
  - Purpose Statement Participants, Agenda

- Ensure everyone knows how to use the technology

- Carefully design the offsite's flow and conduct a dry run

- Assign clear roles

- Set ground rules

- Try for interactivity:
  - Learn and use technology tools such as polling, chat, can even do breakouts on virtual calls

- Embrace the bumps and weirdness

- Don't go too long; you may find that meetings can be shorter than in-person ones

Virtual Offsites That Work, **Harvard Business Review**
What It Takes to Run a Great Virtual Meeting, **Harvard Business Review**

Set an Agenda and Agree on Remote Meeting Guidelines

- For every virtual meeting, it's important to create a clear meeting agenda that includes:

- Key talking points

- Meeting structure (for example, when and for how long you plan to discuss each talking point)

- Team members/teams that will be in attendance

- What each team member/team is responsible for bringing to the meeting

- Any relevant documents, files, or research

- Setting a clear meeting agenda and guidelines (and sending them to the team at least 24 hours in advance) will help ensure that everyone is on the same page before the virtual meeting takes place.

The ultimate guide to remote meetings in 2020, Slack

Etiquette Must-Do's for Online Meetings

- Introduce everyone during the meeting, and give everyone a chance to contribute
- Don't stare at your phone while other people are presenting
- Don't interrupt other people when they're speaking (or attempt to speak over them)
- Test all technology (including camera/video, Wi-Fi, and screen sharing) *before* the meeting
- Read the agenda, and come prepared
- Don't work on other tasks (like checking email) during the virtual meeting
- Turn off all notifications and make sure your cell phone is on silent
- Make sure all team members are in a quiet area free from unnecessary distractions
- When in doubt, just practice common courtesy. People want to be heard, seen, and respected during an online meeting—just like they do everywhere else.

The ultimate guide to remote meetings in 2020, **Slack**

The Dos and Don'ts of Online Video Meetings

- Test your set up
  - Preview your webcam
  - Test your microphone
  - Check your internet speeds
- In group meetings, mute by default
- Set boundaries
- Set an agenda
- Pay attention
- A good rule of thumb is to book video meetings sparingly. Ideally, reserve them for discussions that require visual aids, like presentations and documents.
- When video won't work, move on

The Dos and Don'ts of Online Video Meetings, New York Times

The Tech Headaches of Working From Home and How to Remedy Them

"Our most common work-from-home tech issues are the ones that slow down our productivity: unreliable internet connections, low-quality video calls, software programs that are too narrowly tailored and uncomfortable work stations."

Click link below to read this article.

, New York Times

Instant Messaging
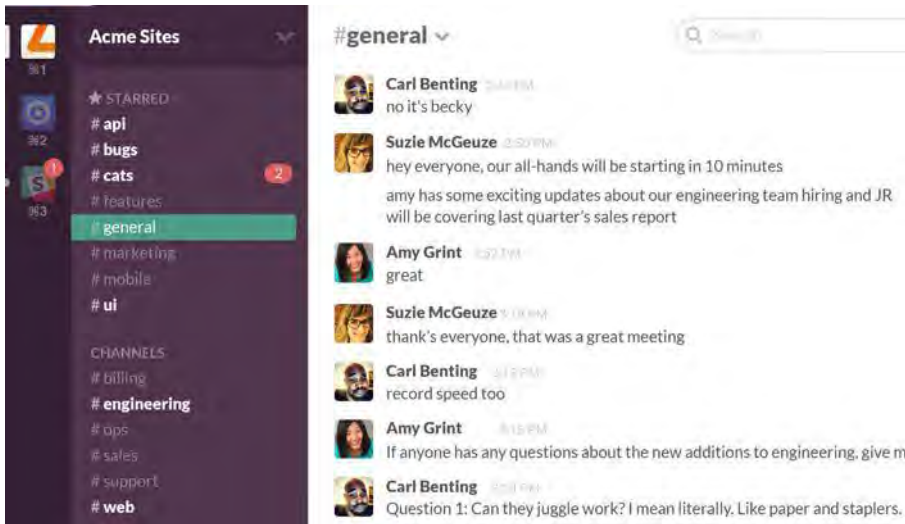
- People not used to remote work are still figuring this out and when to use it (see slides 13-14)

- Rather than starting from scratch with a workplace IM system, companies should build upon what employees already know and like. For instance, Microsoft Teams has instant messaging.

- Get ground rules and know when, how and why to use it.

- Don't get too informal. It's easier to misinterpret shorter text messages.

Maintain a Sense of Culture and Camaraderie

- You may need to over-communicate during this time.

- Offer encouragement and emotional support

- Provide opportunities for remote social interaction

It's 'quarantini' time. People say cheers to video happy hours when they're stuck at home.

Cocktails over video chat are helping people cope with coronavirus fears

Law Firm Holds Virtual Happy Hour For Employees During Pandemic

Virtual Happy Hours Are The New Way To Go Out: Here's How To Plan A Great One, **Forbes**

Your Staff Needs You

Research on emotional intelligence and emotional contagion tells us that employees look to their managers for cues about how to react to sudden changes or crisis situations.

If a manager communicates stress and helplessness, this will have what Daniel Goleman calls a "trickle-down" effect on employees.

Effective leaders take a two-pronged approach, both acknowledging the stress and anxiety that employees may be feeling in difficult circumstances, but also providing affirmation of their confidence in their teams, using phrases such as "we've got this," or "this is tough, but I know we can handle it," or "let's look for ways to use our strengths during this time."

With this support, employees are more likely to take up the challenge with a sense of purpose and focus.

https://hbr.org/2020/03/a-guide-to-managing-your-newly-remote-workers
https://hbr.org/2013/06/making-virtual-teams-work-ten
https://hbr.org/2018/02/how-to-collaborate-effectively-if-your-team-is-remote

Don't Neglect Other Ways People May Need To Connect

Create a "virtual water cooler."

The image of co-workers gathering around a water cooler is [a metaphor for informal interactions](#) that share information and reinforce social bonds.

Absent explicit efforts to create a "virtual water cooler," team meetings tend to become very task-focused; this means important information may not be shared and team cohesion may weaken.

One simple way to avoid this: start each meeting with a check-in, having each member take a couple of minutes to discuss what they are doing, what's going well and what's challenging.

Regular virtual team-building exercises are another way to inject a bit more fun into the proceedings.

Also enterprise collaboration platforms increasingly are combining shared workspaces with [social networking features](#) that can help team members to feel more connected.

[Harvard Business Review:](#)
[How to Collaborate Effectively If Your Team Is Remote](#)
[Making Virtual Teams Work: Ten Basic Principles](#)
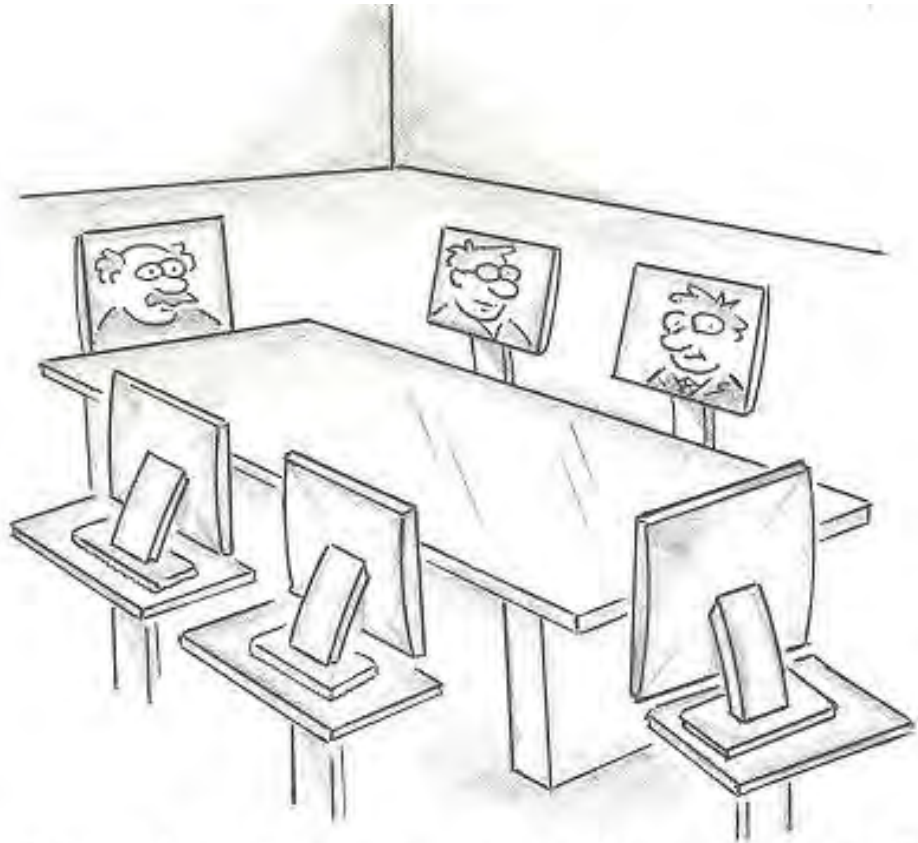[A Guide to Managing Your (Newly) Remote Workers](#)

Be Kind to Yourself...
and Your Staff

"With so many people working from home, the bottom line is we probably won't be as productive as we're used to being. To minimize frustration, it's important to reset your expectations around what productivity looks like. All productivity doesn't go out the window, but you do need to be flexible and adapt.“

- Brigitt Earley, freelance writer and editor

Questions?

Given the number of people attending this webinar, we will field as many questions as we can through the question box.

"Now that I have you all in the same room."

Illinois Center for Specialized Professional Support,
Illinois State University, College of Education

Future Webinars in This Series

Bringing Your Best Self to the Virtual Workplace

Wednesday, April 8, 2020

10:00 a.m.

Best Practices for Remote Work (on-demand at ICSPS)

Wednesday, March 25, 2020

10:00 a.m.

Register at Illinois Center for Specialized Professional Support

Funny Videos for What Not to Do

- Conference Call in Real Life (3-minute video) -- https://youtu.be/DYu_bGbZiiQ?t=11

- Video Conference in Real Life (3-minute video) -- https://youtu.be/JMOOG7rWTPg?t=2

Resources Worth Bookmarking if You Want to Keep Up with Remote Work

https://blog.techsoup.org/posts/nonprofit-resources-for-remote-work-during-the-covid-19-outbreak

https://www.mckinsey.com/

https://www.fastcompany.com/

https://hbr.org/

https://www.inc.com/

More Resources Available...

Adapting Workplace Learning in the Time of Coronavirus

The Complete Guide To Managing Virtual Teams

Understanding the Videoconferencing Tools Available to Your Nonprofit

Nonprofit Resources for Remote Work During the COVID-19 Outbreak

Tips For Transitioning An Office-Based Company To Remote Work

Mastering Virtual Meetings

COVID-19 Has My Teams Working Remotely: A Guide for Leaders

Leading Remote Workers: The Coronavirus' Impact On Effective Management

5 Remote Work Myths to Leave Behind in 2020

Virtual Survival Guide Top 10 Tips for Remote Work Teams

New to Working Virtually? 9 Tips for Surviving the First 90 Days

25 Tips to Help You Manage a High-Performing Virtual Team

7 Tips for Successfully Managing Remote Teams

Harvard Business Review (COVID-19 related resources are free)

    A Guide to Managing Your (Newly) Remote Workers

    8 Ways to Manage Your Team While Social Distancing

    Virtual Offsites That Work

    Your Employee Tested Positive for Covid-19. What Do You Do?

    Best Practices for Instant Messaging at Work

    The Virtual Work Skills You Need — Even If You Never Work Remotely

    Virtual Meetings Don't Have to Be a Bore

    A Guide for Working (From Home) Parents

    15 Questions About Remote Work, Answered

    How to Collaborate Effectively If Your Team Is Remote

    Making Virtual Teams Work: Ten Basic Principles