Leading a Remote Team

Purpose:	The purpose of this document is to provide with you with helpful information leading a team when employees are working remotely. Apply this information when having team meetings, check-ins, one-on-one conversations, difficult conversations, or overall management and support of your team. Healthy, frequent, and candid dialogue between all employees and managers is the key to performance excellence for individuals, teams, and the university. Regular conversations are especially important when managers and their direct reports are working remotely from each other.
Audience:	University of Calgary managers with direct reports
QuickLinks	**Click a link below to navigate directly to that section in this reference guide.** Leading a Team Remotely: Overview Communication Managing Different Schedules Allocating Work One-on-One Meetings or Check-ins Team Meetings Technology for Teams Next Steps

Leading a Team Remotely: Overview

To stay connected with your team when employees are working remotely:

Trust your employees: Foster a culture of trust and your remote team will thrive. Employees may not adhere to the same work schedule; focus on outcomes, not time spent at the computer. Be transparent and set clear accountabilities for each employee. Avoid micromanaging the work.

Have regular team meetings: Regular team meetings allow your team to stay connected and support each other. Establish team norms for working remotely. Ensure there are regular reviews of team priorities and work distribution, ideally in pursuit of common team goals. Have a purpose and agenda for each meeting. Make the meetings interactive, ensuring all employees turn on their video to encourage a line of sight.

Have regular one-on-one check-ins. This allows you to assess how each employee is coping, ensure the employee has an effective work setup at home, conducive to productively and safely working remotely, and supports a two way dialogue on work expectations including priorities, deliverables, and timelines.

Get comfortable with the tools. Practice with the communication tools (Skype, Zoom, Microsoft Teams, etc.) to reduce awkwardness during the meeting. Ask your team to help you test new functionality. Take turns leading the meeting so

each team member can become familiar with the technology. Encourage your team to share tips on using the tools. Video conferencing helps people feel more connected – use it as much as possible.

Ask your team for ways to improve. Be open to new approaches to how you and your team manage your deliverables. Check in with your team to see if the team norms that you established are leading to the outcomes you intended. If not, adjust them.

Offer encouragement and emotional support. Especially in the context of an abrupt shift to remote work, it is important for managers to acknowledge stress, listen to employees' anxieties and concerns, and empathize with their struggles. If a newly remote employee is clearly struggling but not communicating stress or anxiety, ask them how they're doing.

Resources:

Working Remotely

Leading at a Distance

How to Be Present When Connecting Virtually

Communication

There are a number of ways to communicate with your team when working remotely from each other.

Agree on the tools and protocols to use. Suggest ways of communicating to your team, such as IM, email, phone, Skype, Zoom, and Microsoft Teams, and establish agreed upon protocols around their use (when to use IM versus email, videoconferencing, etc.) gather feedback from your team as to their preferences. Ensure that everyone has the technical requirements to use all agreed-upon tools.

Practice on the tools. Encourage your team to use a variety of tools for communicating, in order to become familiar and comfortable with each one. Schedule learning sessions where participants can ask questions or share tips on using each tool.

Schedule regular communications. As a manager, ensure you check in with each of your direct reports every day or two. This can be informal, such as an IM, a quick phone or Skype call, or a more formal, scheduled one-on-one.

Resources:

How Leaders can Maximize Trust and Minimize Stress During the COVID-19 Pandemic

A Guide to Managing Your Newly Remote Workers

How to Avoid Virtual Miscommunication

Managing Different Schedules

Request that your employees keep their Outlook calendars updated with commitments, and share their calendars amongst the team to facilitate scheduling of meetings and check-ins. As a manager, your calendar should be available to your team as well. Your team members should block off time in their calendars when they need to focus on tasks and leave time open when check-ins, one-on-ones, and meetings can be scheduled. Respect their schedules when requesting time with each employee.

Resources:

Planning to Make the Best Use of Your Time

Allocating Work

When a team has suddenly transitioned to working remotely, it can be difficult to balance the workload between team members. When assessing and assigning workload, there are a number of factors to consider, such as: experience working remotely, home situation (some employees may have many distractions, others have few distractions), tasks that are typically assigned to each team member and if they can complete them remotely, and technological limitations.

Here are some ways to help with allocation of work:

- Have employees keep their Outlook calendars up-to-date with daily commitments and tasks.
- Schedule regular one-on-one meetings with each employee where you discuss what they are working on, provide guidance, establish a two-way feedback rapport, check to see if anything is preventing them from completing their tasks, assess their workload, and discuss new work opportunities.
- At team meetings, ask each employee to provide a brief update on what they are working on and whether they need help with anything. This provides an opportunity for your team to support each other in managing workloads. Use team software to share status reports.
- Recognize that transitioning to working from home can be challenging and may require an adjustment time. Empathize with employees that may be struggling and encourage open communication around workload and what is manageable in new circumstances.

One-on-One Meetings or Check-Ins

Many managers have already established a regular one-on-one meeting frequency with each of their direct reports; working remotely requires a shift in modality. For those managers who have not established regular one-on-one meetings at the workplace, these meetings may feel uncomfortable. If you are new to holding one-on-one meetings, ease into the process and explain the reason for the meetings. Spend more time listening than talking.

Have regular one-on-one meetings with each of your direct reports. When everyone is working remotely, you may want to meet more often than when working in person, as you lack informal contact and updates that typically happen in a regular workday. Include the direct report in choosing a schedule that works for you both. The frequency of meeting may vary depending on the individual, their work, and the amount of guidance and support the individual needs.

Practice with the tool, before the meeting. Help participants become familiar with the tool. This reduces awkwardness and wasted time during the meeting. Access tutorials and ask a peer to assist you in conducting a practice meeting. Use video conference whenever possible to improve interactions. Ask for feedback on the tool, from all participants. Remember it takes time for participants to become comfortable with a new tool.

Have a shared agenda and set expectations. Establish a shared agenda. Turn off or mute any background distractions, such as music, email notifications, phone, and texts. Ask your employee to do the same. Listen actively and take notes.

Have candid conversations. Ensure your conversations are open and transparent. Allow sufficient time for the employee to share their perspective. Don't avoid difficult conversations, but do prepare for these in advance. Use a coach-like approach with the use of open-ended questions. If there are performance concerns, be clear on your expectations and share your observations. Give the employee an opportunity to share their perspective. Agree on the way forward.

Send a follow-up email. Summarize what you discussed and include action items. Remind the employee that you are available to connect, if they have any concerns or issues. Working remotely can feel very isolating, especially if employees are used to physically connecting with their team each day.

Resources:

The Basics of Effective One-on-One Check-in Meetings

Connect to Perform website: One-on-One Meetings

Team Meetings

Assign roles and share leadership of the meeting. Consider rotating leadership of the meeting. Have a time-keeper, note-taker, and a facilitator.

Establish an agenda and share it in advance. Solicit ideas for agenda items and prioritize items. Virtual meetings are more effective when they are relatively short (an hour or less). Agenda items should include most team members and focus on discussion topics, not one-way communication.

Plan for interaction and participation. Encourage participation by requesting contributors ahead of time (presenting a safety moment, providing a project or task update, sharing a success story, etc.) Plan for discussion and debate. Try not to use team meetings solely as a forum for one-way presentation of information.

Ensure that each person has an opportunity to speak. Ask each team member for their perspective on agenda topics. Facilitate the discussion to include all participants. Status updates are not particularly conducive to team meetings unless they are very brief and focused on interdependent work. Follow up one-on-one if you have any concerns, or would like additional details. Encourage discussion. Allow time for informal 'catching-up' as well as work related conversations.

Capture and follow up on action items. Identify key action items coming out of the meeting and share these with the team. Identify accountabilities and timelines.

Resources:

What It Takes to Run a Great Virtual Meeting

How to Combat Rambling Discussion, Distracted Participants, and Other Virtual Meeting Landmines

Six Things You Must Do to Ace Remote Meetings

Technology for Teams

There are a number of tools available to support communication and connectedness between managers and their employees, when everyone is working remotely. The University of Calgary supports Skype for Business and Zoom. Microsoft Teams is another helpful tool to consider.

Skype for Business	Zoom
Use Skype for: Checking in with your direct reports One-on-one conversations Team meetings	**Use Zoom (with video) for:** One-on-one conversations Performance reviews Team meetings Presentations
1. In Outlook, when you create a new meeting, click the **Skype Meeting** option. 2. A link is added to the Outlook meeting invitation. Participants can click Join Skype Meeting to connect via their computer audio. 	1. Launch the **Zoom** app. 2. Click **Schedule**. 3. Enter the information for your meeting. 4. Zoom generates an Outlook meeting invitation. Add your meeting participants.
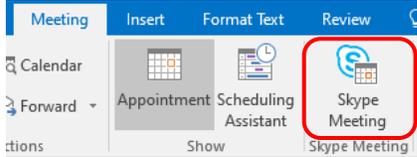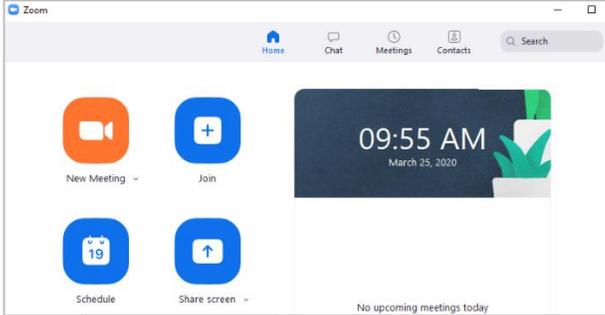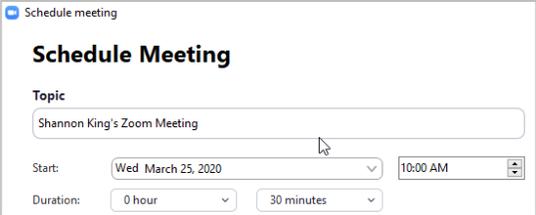
Resources:

Learning Zoom

Learning Skype

Microsoft Teams Tips & Tricks

Next Steps

There are many existing resources available on how to connect with your direct reports and how to use technology to connect when your team is remote:

Connect to Perform

University of Calgary Guidelines for Working Remotely

Working and Learning From Home

Working with Zoom

Covid-19 Community Support