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Amy Jauman

Motivating Remote Workers

Use technology, education & communication to get things done

AMY JAUMAN

MOTIVATING REMOTE WORKERS

USE TECHNOLOGY, EDUCATION & COMMUNICATION TO GET THINGS DONE

Motivating Remote Workers: Use technology, education
& communication to get things done
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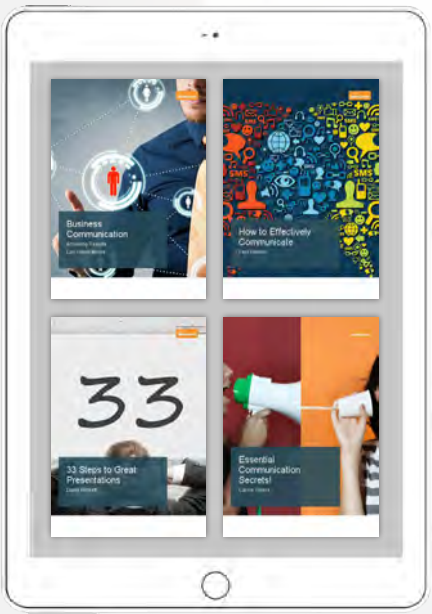

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ABOUT THE AUTHOR

Dr. Amy Jauman, SMS, is an author and ghostwriter, international speaker, and the Chief Learning Officer for the National Institute for Social Media. She focuses on using social media, experiential learning techniques, and online resources to make information meaningful to adult learners in traditional and remote business and educational environments. Previously, her focus was on supporting remote workers in a variety of professions, focusing on how technology, education, and communication should be leveraged for success. She has developed and taught online and blended courses for 15 years in traditional universities as well as business training environments. Her audiences have included traditional and non-traditional learners around the world.

In addition to her ghostwriting projects, Amy authored the NISM textbook Comprehensive Field Guide for Social Media Strategists: Master the Six Content Domains of the SMS Exam and, in 2018, released Certification Success: Create Your Personalized Study Plan, through Kendall Hunt Publishing. Her current project is A New Leash on Life: Tips and Tails from Rescue Dog Houses.

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1 LET'S START BY MOTIVATING TEAM LEADERS

A good leader understands the importance of motivation and their own role in their team's energy and drive. A leader might argue that how hard an employee is willing to work is ultimately up to the employee themselves and, to an extent, they'd be right. A leader might also argue that sometimes there are factors out of their control that will hinder employee performance no matter what they do. That's also true! With all of that to combat, why bother trying to keep your team motivated – especially when they are remote and connecting with them in a meaningful way may feel impossible?

If you need motivation to keep trying to support a team, consider these statistics from recent surveys on employee engagement:

- **Disengaged employees cost organizations around $450-550 billion each year** [i]. In the United States, disengaged workers drain overall productivity as a result of their lack of ownership and responsibility for their work product. And, according to a separate Gallup study, [ii] work units with the highest employee engagement showed 21 percent higher levels of profitability and 17 percent higher productivity than those in the lowest quartile. As a leader, you can definitely create an environment that fosters engagement.
- **81 percent of employees would consider leaving their job for the right offer**.[iii] If you think employees are always chasing a fatter paycheck, this study challenges that assumption. 74 percent of younger employees would accept a pay cut for a chance to work at their ideal job, and 23 percent of those seeking a job wouldn't need a pay increase to take a new position. If you think the biggest motivators for employee satisfaction are out of your hands, you're wrong.
- **33 percent of individuals changing jobs cited boredom the main reason they were leaving**. In another study,[iv] 24 percent indicated a work culture that didn't fit their values as their main reason for leaving, while a larger salary was only 19 percent. The leader sets the tone for the team, and that is good news for you! That means in your leadership role, you can use your skills to motivate each team member to maximize their contribution and at the same time help them be happier at work.

If you feel tempted to accept disengaged employees as a normal part of leading a team, I hope the startling costs and opportunities for you to positively influence each category listed above inspire you to keep trying. If you think you can't combat your company's pay bands or lack of competitive salary in the market, realize that, while pay is important, it

isn't everything to everyone. And if you think that your team members are wired to just punch a clock and collect their check, I hope the percentage of people who will leave a job simply because it isn't challenging them gives you a new perspective on what encourages contribution in the workplace.

What's the plan?

Now that you're inspired by the risk and opportunity of an uninspired workforce – both in lost productivity and missed opportunity – we're ready to talk about what you can do about it. And we're going to look specifically at how you can motivate your remote teams.

Since every remote team operates under a slightly different design, with different goals and resources, this book will act as a guide for you to follow, providing questions for you to answer about your unique work environment. You'll choose the steps that will benefit your team and explore the opportunities available based on your current resources. When something doesn't apply to your environment, you will let it go – but hopefully not without a thorough and honest exploration of why it doesn't fit your environment.

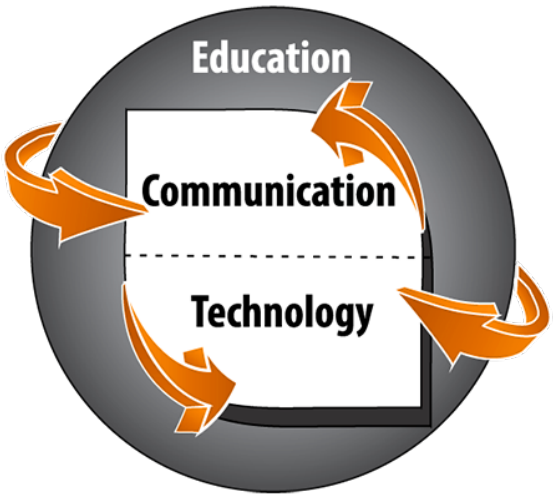


Figure 1.1 The TEC model

To keep all the opportunities you have to motivate your team organized, we're going to look at them in through the TEC model in three distinct categories: technology, education, and communication. And even though there are three separate categories, we're also going to talk about how each of those categories supports the other two. For example, a lot of educational opportunities are supported by online learning, so providing your employees with the technology they need to easily complete the continuing education that interests them is key to their learning. As we explore these components in future chapters, you'll see these elements discussed in detail and the many ways in which they intersect.

2 MOTIVATION BIG AND SMALL

Everyone is motivated in different ways by different things. As you read this book, I'd like you to think about how your remote team members may be experiencing two types of motivation: big, long-term, sustaining motivation and the little things we experience every day that keep us going.

2.1 BIG, LONG-TERM, SUSTAINING MOTIVATION

Your employees may have a job because they're the primary provider for their family or because they're passionate about the work they do. They might pursue an advanced degree because they want to advance their field of study or because they want to advance their career. Whatever big motivation is bringing them to work every day, it's helpful to understand their mindset. One leader shared the following story about the day she realized she wasn't connecting with one of her employees in the right way.

> She was the worst entry-level employee I had ever hired. It seemed like she had mastered the art of doing the bare minimum – maybe just to frustrate me and everyone else on the team. Whatever she was assigned to do, she'd do just that. The final straw was when I reviewed her systems log and realized she clocked in and out for eight hours every day to the minute. I realized she must sit and wait for the clock to change so she can be done for the day.
>
> During one of our check-ins, we were casually chatting, and she mentioned how much she disliked the hunting shows she always watched with her husband. Laughing, I asked her why she watched them if she disliked them so much? She responded, "Because that's one of the ways we spend time together. That's important to me."
>
> Suddenly, everything clicked. She wasn't motivated by the same things that excited the rest of our team. She was probably equally dedicated to and thankful for her job, but what she loved was that her work allowed her to bring home a paycheck that helped support her family while allowing her to spend the maximum amount of time with her loved ones. It wasn't that she didn't value her job, it was that the value she saw in her job was different from the value I saw in my job.

> I can't say that I completely understand where she's coming from – that's just not how I think about work. But I respected her as a person and wanted to honor what was important to her. Over time I made small changes that allowed us to shift work to her that required very little innovation and just needed time and attention. With that taken care of, the other team members were able to focus more on the projects that inspired them. By figuring out our differences in motivation, we've created a more effective environment that works better for everyone.

It can be frustrating as a leader to encounter an employee who seems to lack motivation. And there are certainly people in the workforce who simply don't have any motivation at all! But sometimes the answer is much simpler. Sometimes their big motivation is just different from yours and that difference may be hard to see.

2.2 LITTLE EVERYDAY MOTIVATORS

In addition to the big things that keep us moving forward, there are also small things that keep us all in check. What time do you think you'd show up for work in the morning if you didn't have a work schedule? How often would you forget to complete steps in a project if you didn't have a project plan? There are hundreds of small motivators that help us all stay on track.

- Work schedules
- Routine meetings
- Project plans
- Reports
- Updates and presentations to leadership

Balancing these motivators can be tricky, though. If a leader implements too many of them, they decrease productivity. For example, if you require daily reporting that is so complicated it takes an hour for the employee to complete, you've committed five hours of their workweek to updating you on what they're doing. In some cases, the reporting may be that important. In most cases, it isn't, and it would be better to switch to a weekly reporting process, or one that is less detailed.

2.3 MOTIVATION AND REMOTE WORK

Can the same principles be applied to a remote work environment? Yes, they can. And most people would argue that it's even more important for leaders to understand the many different ways people are motivated.

Throughout this book, we'll discuss how technology, education, and communication motivate and demotivate employees, but it's important to remember one thing: leaders working in a remote environment have to make a concerted effort to understand what motivates their team members and keeps them making good choices. Where a leader working in a shared physical space with their team member may observe different motivators without any effort – an overheard phone call, a casual conversation at lunch, etc. – remote team leaders need to orchestrate ways to collect the same information. A few opportunities may include:

- Regularly logging in to online meetings early and chatting with the team before the formal meeting begins.
- Making an effort to follow up on personal conversations as appropriate (i.e., asking how their child's ballgame went the night before or inquiring about a class they're taking).
- Checking in with people about current events – either to lighten the mood (if there's a funny meme floating around the internet) or to show that you genuinely care (if there's a troubling news story everyone is thinking about).

More specific recommendations for supporting a remote team's motivation will be discussed, but it's important to acknowledge early on that learning about motivation is important, and accepting that it will look different in the remote work environment is critical to success.

2.4 IDENTIFYING MOTIVATION

Figuring out what motivates a person is both simple and complicated. The simple approach has two steps:

1. Take a moment to reflect on what you believe motivates each of your team members. Consider what you know about their personal and professional goals, work you've seen them run with under little or no supervision, and occasions in their past performance where they have struggled or excelled.
2. Ask the employee what motivates them. Give them time to consider their answer and, if needed, remind them of projects or activities they completed where they appeared to be highly motivated. Those examples may help them identify and explain how they perceive their motivation.

The more complicated approach is validating what you and the employee believe to be true. You may find that your assumptions, and even what the employee believes about their motives, aren't quite accurate. Consider the following story from a remote team leader:

> A tearful Anton described how the immense pressure I'd been putting on him had rendered him useless in his work. He told me he felt paralyzed by the deadlines I had imposed and suffocated by the constant check-ins. I hadn't set expectations for him that were any different than what I had asked of my other team members, so I was confused – but I was also suddenly panicked. Was I making everyone on the team miserable?
>
> I asked Anton for the weekend to think about his feedback. Friday afternoon and Monday morning, I touched base with a few other people I managed. I casually asked how they were doing and how they were managing our workload. Most had very positive responses, but one sensed there was more to why I was asking. I maintained Anton's confidentiality, of course, but I did share that I just wanted to make sure that my deadlines were motivating, not oppressive. She laughed and said, "Are you kidding me? Deadlines are the only reason I get anything done. I think you can relax. We're fine."
>
> Feeling somewhat better, I still needed a plan for Anton. In our next conversation, I asked him if softer deadlines – a check-in with a guaranteed extension – would help. He beamed and said it would. He said he could already feel his anxiety levels lifting.
>
> In the first week of our new arrangement, Anton did miss his deadline. He then missed his extension. Our new arrangement wasn't working.

First of all, it's important to commend this remote leader for their attempt to improve a challenging situation! They navigated past their ego and remained open to the possibility that they had unintentionally created an unhealthy work environment. Protecting employee privacy, they collected data and then returned with a plan.

What went wrong? This is the complicated part of motivation. What we think motivates us and others isn't always what drives our actions. In the above example, early results would indicate that it wasn't the goals or the schedule that Anton was struggling with, so what was it? Did he have too many external commitments? Was he lacking the training he needed to complete the work? Was his workload unrealistic?

The good news is that by confirming that looser deadlines weren't the issue, Anton and his boss are one step closer to identifying what the real issue is. Anton, who likely truly believed it was the deadline that was the issue, can provide more accurate feedback and ideas. The team leader can explore other areas that might be modified to help Anton be successful.

2.5 SELF-MOTIVATION

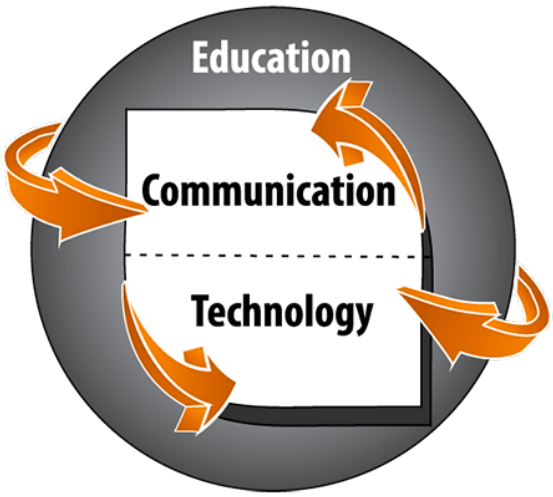
It's also important to identify a team member's ability to stay self-motivated in the hiring process or, if they're already on your team, to encourage each employee to explore their motivation. Some of the same techniques from this chapter can be shared with employees to help them stay motivated. Try asking the following questions:

1. What parts of your work are most exciting to you? Why?
2. What big things – long-term goals, etc. – motivate you to do good work?
3. What are the small things that keep you motivated every day (deadlines, team meetings, etc.)?
4. If you could change one thing in your work environment that would increase your motivation, what would it be? Why do you think that would help?

By asking these questions, you may help your employees make small changes that can have a big impact on their productivity and overall happiness at work. You may also help them identify and appreciate the things in their environment that they enjoy.

3 WHAT IS THE TEC MODEL?

Earlier in this book, we introduced the concept of the TEC model – a design all remote workers can embrace to ensure they're paying enough attention to the right things in their work environment. The model helps us remember that there isn't any one thing that makes a remote employee successful. Rather, the careful maintenance of multiple factors is what leads to a healthy remote work environment.



We'll talk about each of these categories in detail in the following chapters, but I wanted to provide an overview of how important it is to remember that technology, education, and communication all support each other.

3.1 TECHNOLOGY SUPPORTS EDUCATION

We have access to more education through online resources than anyone in history has ever experienced. We do have unique challenges, not the least of which is identifying what content is right for us when there are so many options to wade through. But it's important to recognize that if leaders choose to support continuing education and team members choose to pursue it, our opportunity to grow is endless.

Similarly, education supports technology. If you are feeling overwhelmed and need help using a new piece of technology, the odds are pretty good there's a free resource online that will help you with whatever you need. And if you're in a good place with the technology you're using and want to get to great, you can find help for that, too!

3.2 EDUCATION SUPPORTS COMMUNICATION

Education can refer to learning how to use communication tools and it can refer to understanding communication guidelines. Whatever the need or application, taking the time to teach and learn how to effectively communicate is critical to the success of remote teams.

Communication also supports education. Remote leaders who understand what motivates their team members can communicate support of continued learning through professional development plans, information delivered in the way team members prefer, and by asking the right questions that will lead to the best results.

3.3 COMMUNICATION SUPPORTS TECHNOLOGY

Communication supports technology by empowering leaders and team members to articulate what's working for them, what they need, and what they need help with. Not only does good communication allow employees to be heard, but it also permits them to be honest about challenges. This gives team leaders the best chance of keeping them productive.

And, of course, technology supports communication. Those that want to talk things through with their boss can call or video chat. Those who want to carefully craft their message can send an email or record a video. Need a quick response? Try a chat or text message. Technology allows our smallest communication needs to be met.

I hope thinking about the three categories doesn't feel overwhelming and instead feels manageable. After all, three things to check in on is easier than the hundreds of moving pieces in our work environment! When we boil the work down to what makes us successful, it is the technology we have and how well we use it, our commitment to education, and how successfully we communicate.

4 TECHNOLOGY

One of the clearest ways technology can help motivate your remote team members is by providing structure and accountability. The unique requirements of various teams and organizations, in combination with the personalities and individual needs of remote leaders and remote workers, mean how the technology is used will vary by team, but there are a few guidelines that apply to everyone.

4.1 CHOOSING THE RIGHT TECHNOLOGY TO MOTIVATE YOUR REMOTE WORK TEAM

It may sound obvious, but the first question you and your team need to ask is, "What do we need to accomplish?" Sometimes teams either work with what they have or purchase the resources they think they'll need because they were recommended by someone else. Both of those approaches are a great place to start – and perfectly logical! But they can't be how you make your final decision.

Within organizations, every team has written and unwritten contributions they make. A collaboration session to highlight what those contributions are and then a second session to make sure you didn't miss anything will help you understand exactly what you need to be successful. A few tools to help you get started include:

- Daily schedules and routines. Thinking through what you do each day will help you identify what resources you use to complete routine work. For example, you may scan information every week, but because it's a small part of your job, you may initially forget to mention it. Walking through your regular routine can help jog your memory.
- Job descriptions. Especially once you've been in a job for a long time, it can be hard to describe what you do! And we all know our job descriptions never cover everything, but they can be a great way to get the ideas flowing.
- Email or other communications. Taking a few minutes to scroll through your communications can remind you of what typically comes up that you need to address. Messages may be a direct or indirect link to work that isn't necessarily ever on your schedule or even on your mind.

The second question your team needs to answer is, "What do we want to accomplish?" In most cases, there is no reason for a remote team to do less than a traditional team. However, some organizations treat them as if they don't have the same abilities. This typically happens

as a result of leaders accepting a process of how things are done, as opposed to looking at the final product and considering how a remote team could accomplish the same goal. For example, just because a remote team can't be in the same room as the organization's leadership team doesn't mean they can't deliver a presentation. The remote team leader just needs to suggest presenting through a webinar.

If a remote team hasn't considered this possibility, they should. It can be incredibly motivating to share your ideas! Remote team members who may have previously felt ignored and overlooked will finally feel like they have a seat at the table.

4.2 MAXIMIZE THE TECHNOLOGY YOU HAVE

Team leaders (or whoever is managing the budget) often run and hide when the topic of technology comes up. Talking to your team about technology sounds…expensive. The resistance I often hear is something like, "We can't afford to buy everyone everything they want!" The funny thing is, except for overdue upgrades, the smarter choice is almost always to have teams get more out of what they already have.

Check with your team about what motivates them and compare what you think to what they say motivates them. How does technology support their motivation?

Project Goals & Deadlines

I often joke that the surest way to never get something from me is to say, "Just send it whenever you have time!" It is partially true, though. I, like many people, keep a busy schedule and if I'm waiting for free time to get a project done, that project will probably never get done! Realistic goals and deadlines should be set and monitored to help remote workers prioritize their time and keep moving forward.

Technology supports this process in many ways. Electronic calendars can provide reminders, project management tools can allow for easy management of timelines, and shared documents can help us all offer our unique contributions.

Regular Communication

Have you ever thought about how many unplanned conversations you have in a day? In a traditional work environment, you may pass people in the hallway or chat just before or after meetings. We share elevator rides, sit together in the lunchroom, and even pop by each other's offices for a quick chat. All of those unplanned connections happen in what are called "crash spaces" – the places where people run into each other (in a good way) around the office.

In a remote environment, crash spaces have to be created. This can happen when you open a webinar five minutes early so people can chat while they're logging in or by using a chat feature shared by everyone on your team. While it's important not to let these crash spaces detract from productivity, it's important to include them to promote team bonding and to provide the occasional morale boost!

Manageable Communication

The acronym TLDR (Too Long Didn't Read) emerged in recent years as a way to acknowledge receipt of information while simultaneously stating you didn't even attempt to absorb it. Whether you see this response as passive-aggressive or wonderfully honest, it's important to acknowledge that it emerged because so many people were creating content that was wordy and unnecessarily convoluted – at least in the opinion of recipients.

If your team thrives on shorter, more frequent communication to be successful, transition from emails and conference calls to chats – short messages within project management tools or the more traditional chat systems. While it's unlikely you'll be able to eliminate long-form messaging, you can likely decrease its use and thereby increase the percentage of

information being shared that is read and understood.

Personal Connections

If team members comment that they wish they knew their other team members better or if you, as an observant leader, notice that your team is fairly disconnected, you can leverage existing technology to help people get to know each other. Try scheduling a Monday afternoon or Friday morning team check-in that has a casual agenda, allowing people to talk about their week in a relaxed format. Or take it a step further and schedule a Friday afternoon "happy hour" where the team can get together just to hang out. With the web conferencing available today, there's no reason not to connect and just catch up as a team of people who have a shared interest – at minimum, everyone works for the same company!

You can do a lot with what you already have and you can probably do even more than what's listed in this chapter. Your starting point is to figure out what the needs and wants of your team are. After that, you can compare the list to the resources you have.

4.3 MANAGING GAPS IN TECHNOLOGY

If you do find that your team needs a resource that you don't have a budget for, there are a series of questions you need to ask that will either provide you with a solution or help build your case for additional funding.

1. **Is the tool a necessity?** First and foremost, you may find that something you've been doing doesn't need to be done anymore or, more like, can be done differently. Before working too hard to keep the task on your team, make sure the task can't be handled by another team.
2. **Can the task be completed differently?** Earlier we used the example of a remote worker needing a scanner. Instead of scanning, could the documents be photographed on a smartphone? The answer may be "no" for any number of reasons, but it's worth exploring other approaches when possible!
3. **What is the best affordable solution?** If you do find that making a purchase is the best option, do your research and be prepared to present the best options. While completing your research, you may find solutions that can provide additional benefits, strengthening your case for purchasing technology for your team.

Getting technology in place that motivates remote workers begins by looking at their needs and talking to them about their goals. As remote employees, they are the ones ultimately responsible for their success, but providing them with the right tools that can make their work easier and keep them inspired should be at the top of the list for a leader of any remote team.

5 EDUCATION

There are a few categories that need to be explored when we consider education and the remote worker. The first is the educational resources remote employees need to do their jobs successfully. The second is professional development plans (PDPs), common in traditional office environments and often overlooked in remote work environments. Both of these items are important additions to any employee's professional development, but they are especially important to the motivation of a remote worker for a few specific reasons.

1. Many of us grow and develop in our workplace as a result of opportunities that emerge during the course of business. Because we are "seen" by our coworkers and leadership team, opportunities come our way. Remote workers have to approach being seen a little differently; it isn't as likely to happen to them as it is to their peers who work in a shared space.
2. Even as the prevalence of remote work increases, many team leaders still hold the belief that remote workers are content just having flexible work arrangements and aren't interested in developing any skills. If they transitioned to remote work so they could care for a family member or because their spouse's job required them to move, a team leader may automatically put them into a "just grateful to be working" category, even if that employee's goals haven't changed.
3. Especially when they are new to working remotely or if the majority of the organization works in a traditional office environment, it's common for remote workers to be hesitant to talk about education and advancement. Even though they are contributing as much or more than their peers, they sometimes feel that their work arrangement is a gift from the organization that means they shouldn't ask for anything else. These ideas can come from a lot of different places – previous jobs, friends, or current co-workers making comments about the advantage they have working at home. However they end up there, a remote worker who doesn't believe they deserve professional development is unlikely to pursue it on their own.

As a leader in a remote work environment, you have the greatest opportunity to identify opportunities to inspire and motivate your team by talking to them about how they can pursue their interests and develop professionally. It requires an intentional effort on your part, but as we discussed in the last chapter, technology can support your efforts and help you be effective!

5.1 MASTERING THE TOOLS YOU NEED TO BE SUCCESSFUL

Have you ever known someone who always skips reading the directions when assembling shelves? They will literally pick the instructions up and set them aside – it isn't that they don't see them. It's that, somewhere along the line, they adopted the approach of learning by doing, so their approach to figuring something out is to dive in and make it work.

Even the people who typically read directions are susceptible to taking this approach when using online tools. Consider how common the following scenario is.

> Luis is settling in for a call with a new client. It's informal – just a "getting to know you" video chat. He hasn't had to prepare any content and the only thing he's worried about is using the client web conferencing software. He hasn't used it before, so he wants to make sure he's able to access the system without any issues.
>
> The day before the meeting, Luis logged into the system and took advantage of their test webinar option to make sure he wouldn't have any issues the next day when he participated in the real call. Once he saw that the systems all worked, he sighed with relief, logged off, and moved on to the next item on his to-do list.

Luis sounds like a pretty conscientious employee, doesn't he? Testing technology in advance demonstrates an excellent level of care and consideration. But he was focused on making sure he could connect and missed the opportunity to explore what the web tool could do. If he had further explored the site, watched a few demos, or even read the list of product features, he may have realized how he could have used the tool to connect and make a stronger impression on the client.

It's common for remote and traditional employees to take that approach to learning. Even the best employees often need reminders to consider more than the opportunities we see initially. This kind of change in thinking begins with reminders from leaders and eventually becomes part of the culture.

If you like the idea of helping your team make the most out of the resources they use every day, try this approach to getting everyone on board:

1. Tell everyone what you're doing and why! This isn't supposed to be a secret – you care about their professional development and the team's effectiveness. Let them know.

2. Brainstorm topics as a group. Ask your team what high-level tools or tactics are at the core of their success. No restrictions – they can mention tools like Excel or techniques like conference calls.
3. Identify champions for each item – just one item per champion to start. A champion will be the person on the team that researches best practices for whatever topic they've expressed an interest in. They're then responsible for passing what they've learned on to the team.

Not only does this approach help the individual employee dive in and learn about something that genuinely interests them, but nurturing their interest benefits the wider team. When encouraging champions, keep the following tips in mind:

- Instead of having them "report out" on what they have learned, make them the expert as needed. For example, instead of someone talking for 30 minutes about what they learned about Excel, ask them to share a small tip each week that will help the team or ask them to design a spreadsheet template for a project when the need arises. Integrate their knowledge into your daily routine so it becomes part of your culture instead of a one-time event they can check off their list.
- Whenever possible, ask them to choose their topic. You may have two people interested in the same topic, so one person may have to go with their second choice, but it's unlikely you won't be able to figure out a viable solution! Allowing people to choose topics instead of assigning topics will help with buy-in.
- Ask the team member how they want to share what they learned. As long as the approach is ongoing and not a single event, allowing them to choose their delivery method will help them be successful. If someone likes writing instructions, they will create a wonderful set of tips that everyone will receive via email. If someone else enjoys making explainer videos, the team will enjoy and learn from creative video production. Giving that kind of trust to your team is incredibly motivating and allows them to choose the path that will make them most effective.

Creativity, inspiration, and professional development related to what might initially seem like the most boring part of their jobs can become some of the most motivating work they do. Not only will they perk up over being responsible to their team, but they will also be energized by learning new things.

5.2 CREATING A PROFESSIONAL DEVELOPMENT PLAN (PDP) FOR A REMOTE WORKER

A Professional Development Plan (PDP) is a common tool used in organizations and most of the guidelines that apply to writing PDPs are consistent between traditional and remote employees. If you aren't familiar with the concept, here are a few of the most important considerations:

- A Professional Development Plan (PDP) is written by an employee and discussed with their immediate supervisor.
- The supervisor should take an active role in supporting the plan by asking questions and making recommendations as appropriate to help the employee be successful.
- The first section is a brief assessment of the employee's current professional state, including skills, strengths, and accomplishments.
- The second section is a list of the employee's goals.
- The third section outlines how the employee will accomplish those goals – and this is what will likely require the most research on the part of the employee.
- The final section is all about measurement – the employee's timeline, how success will be measured, and estimated costs.

If this is a new process for you and your team, and if your organization doesn't offer a template for the process, a good starting point is to do a little more research on how to design a PDP. There are a lot of excellent free resources online! But when you're working with a remote employee, remember these few additional considerations.

- If you're in separate geographic locations, you likely have different resources available to you. In-person course options are one reason why the employee must take responsibility for the plan.
- Share opportunities in your area as potential research points for your remote employee. For example, you may live in a city that promotes a lot of community education courses. Mentioning those to your team members writing their plan may prompt them to search for similar resources in their area.
- Encourage a blend of online and in-person educational opportunities. The employee may end up with a plan that is exclusively one or the other, but it's important to have as many search options as possible.
- Keep engagement and measurement top-of-mind. Especially with free or low-cost options, it can be tempting to multi-task or only complete a portion of the material. Whatever they choose, encourage them to be present.

- Be honest about your budget – and try to find a budget for education! Even a small investment in their development will go a long way to making them feel appreciated.

The value an employee will find in their leader taking the time to work with them on professional growth is difficult to measure. It motivates the remote worker by renewing their sense of pride in their work and increases their productivity by providing them with solutions they crafted themselves.

6 COMMUNICATION

Communication is a hot topic for remote teams and virtual organizations. Especially if employees haven't had an opportunity to experience remote communication, collaboration, or learning on their own, the concept can be daunting. People might worry about being too reliant on technology or losing the personal connection they have with coworkers. They may just be anxious because they don't know what to expect and immediately assume the worst.

In this chapter, I'll talk about a few of the more common communication tools used by remote teams and the best ways to integrate them into a team's routine. There are hundreds of specific programs and tools available, so we'll look at generic approaches as opposed to specific tools (i.e., email vs. Microsoft Outlook). There's no way to cover every type of communication, so after reading about the most popular types, I encourage you to explore other options on your own.

6.1 WHAT IS EFFECTIVE COMMUNICATION, COLLABORATION, AND LEARNING?

Before we look at *how* a remote team can communicate, collaborate and learn effectively, let's define what an effective result looks like. A message is successful if it:

- Is understood by the sender and receiver in the same way.
- Supports (as opposed to contradicting) previous messages and company goals/values.
- Conveys a message succinctly, making the most of everyone's time.
- Encourages discussion as needed (as opposed to leaving the recipient feeling like they can't follow up or ask questions if needed)

We'll focus on what this looks like on a remote team, but the definition applies to any group in any industry. There are few other considerations we won't cover specifically that you may want to look at on your own:

1. There will be times when the content of your communication or variables outside of your control will prevent you from communicating in the ways you've determined are most effective. For example, an initial communication about a change in leadership may be vague (understood differently by the sender/receiver) and not open for discussion for legal reasons.

2. *How* you communicate is only part of your success criteria. Individuals or groups sending a communication have to have a certain level of clarity themselves if they expect others to understand their message. Lack of clarity in the sender's mind often leads to contradictions, a rambling design and the feeling that questions are not welcome.

There are subtle nuances in each consideration of good communication and, as always, exceptions to every rule. But if you're assessing the current communication successes and challenges in your environment, the above lists are a great place to start. If you do identify a specific category in which your company excels or struggles, that can be a great place to focus your energy. Promote successful habits, learn from them and model other aspects of team communication around them if possible. Redirect and explore solutions for the less successful areas.

6.2 MANAGING EMAIL

In today's culture, managing email effectively is a requirement for many jobs. Email isn't just for remote employees. A remote sales team, geographically dispersed multi-unit managers or a variety of other leaders and employees across multiple industries use written communication via email to accomplish business tasks. This can lead to several challenges:

- **Lost Messages**. The more people communicate through email, the more important it is to organize incoming and outgoing messages carefully. Creating files and flagging emails help manage and hang onto messages in a fast-paced environment.
- **Misunderstandings**. In many forms of communication, we rely on the tone *of our voice* to convey meaning. Because tone is absent in written communication, the sender should avoid using any kind of sarcasm and be extremely careful with the use of humor to avoid misunderstandings.

Once a remote team understands and adapts to the above challenges (and likely a few others that will naturally emerge), they can begin to appreciate the benefits of email communication. Organized emails allow effective asynchronous communication. You can read and reply when you are ready and able to focus. They also provide you with an opportunity to save content for an easy reference in the future.

As a leader in a virtual environment, you have an opportunity to lead by example and provide direct feedback when teachable moments present themselves. Continuous feedback in the moment can help employees learn, collaborate more effectively and make practical changes to become more organized and efficient.

6.3 TELEPHONE TIPS

As popular as email is in the remote environment, there are still a lot of reasons to use the telephone as a communication tool. The most commonly cited reason is associated with the ability to use our voice to convey the tone of a message. A close second is the benefit of faster communication; if you connect with someone on the telephone, you might be able to resolve an issue within minutes whereas an email exchange would have had time lags.

Telephone communication has unique challenges. If you're communicating across time zones, your window for connecting may be small (or one of the communicators may be forced to participate outside of regular business hours). There is also less flexibility since the communication is synchronous. The time restriction may interrupt creative endeavors or conflict with other job requirements.

If you do choose to communicate via telephone, always remember the following basic tips. (And if you're a leader, remember to provide feedback to team members that aren't following these basic guidelines.)

- Invest in the right tools to support telephone communication. An employee may decide to invest in a headset so they can have both hands free or they may realize they need to upgrade their current phone system to ensure they have a reliable connection. The right tools will vary depending on job requirements.
- Follow basic phone etiquette for every call. It can be tempting to multitask when you're on a telephone call, but the distractions in your environment are almost guaranteed to detract from the quality of your call. Ask yourself which task is more important.
- If you're the recipient of information, ask for clarification as needed. If you're providing information over the phone, check to make sure your message is understood. On the telephone, we don't have visual cues (like a puzzled expression or the absence of note-taking) to tell each other when miscommunication begins. Because of that, it's especially important to *ask* and *ask for* questions.

6.4 VIDEO CONFERENCING BEST PRACTICES

Video conferencing has almost identical challenges and benefits as telephone communication. The most notable additional challenges are:

- Challenging or unavailable technology. Depending on your work environment and culture, the individuals you need to communicate with may not have access to video conferencing.
- Resistance from participants. Whether it's vanity (many people find their image on a video conference unflattering), perceived inconvenience or the fact that it inhibits multi-tasking, some employees may resist a video conference option.

But the benefits of video conferencing are compelling. If you can overcome the challenges above, you can experience:

- Non-verbal cues. Seeing your participants will allow you to read facial expressions and pick up on other non-verbal cues that will help you determine what needs further exploration.
- Increased commitment to the experience. Whether they want to maintain their reputation, impress people or simply avoid trouble, when people know a presenter can see them, they are more likely to engage in the conversation.

Remote leaders have the same opportunity to provide feedback to employees regarding their telephone and video conferencing practices as they do with email. The key is still to watch for opportunities to provide specific feedback. If any of the communication processes are new (often video conferencing is) or there has been a significant change in the work environment, there is also an opportunity to establish communication "ground rules" including the tips listed above.

6.5 SOCIAL MEDIA OPPORTUNITIES

An increasing number of organizations are also using social media as a resource for collaboration and team-building on remote teams. Depending on the goal, you might consider:

- A company blog where employees can receive updates and leave comments.
- Posting regularly to your LinkedIn company page, highlighting the important company and industry updates.
- A group or company page on Facebook that allows employees to share successes and discuss questions related to the work they're doing.

- Boards on Pinterest that showcases company products and/or connect employees to the company website.
- A Twitter account for quick updates, shout-outs, and links to company or industry information.
- Google Apps for Business for virtual collaboration through a variety of tools.

There are so many social media platforms available the opportunities may feel simultaneously exciting and overwhelming. Consider what goal you'd like to accomplish (collaboration, team building, knowledge sharing, continuing education, etc.) and, if possible, get feedback from your team before choosing *one*.

7 DEVELOPING HABITS

If you're creating a new remote team, assessing the effectiveness of an existing remote group or integrating new remote team members, all of the things we've already talked about will need time to take root. Whenever you introduce a new way of doing something, always remember three things:

1. Don't forget to tell people *why* you're doing something. Often people don't realize all of the benefits associated with what you're sharing.
2. Always tell them *how* to be successful. Never assume they will figure it out on their own. Save them time and frustration and provide them detailed instructions.
3. Be available for questions. Use phrases like, "What questions do you have about what we just talked about?" to imply that feedback is not only accepted, it's expected!

7.1 DECISION MAKING IN A REMOTE ENVIRONMENT

Decision-making is a critical component of *any* leadership role. Leaders may find themselves making decisions about day-to-day operations, major purchases, employee development or any element specific to their industry. Whether we realize it or not, as leaders we're making decisions constantly and often without careful consideration. After all, if we created charts, followed multiple steps and labored through every possible consequence related to the decisions we make every day, how would we ever get anything done?

Some decisions do require more thought than others, and a big component of making good decisions is knowing when to respond quickly, when to take time to consider the task more carefully and at what point – if ever – it's best to involve others.

7.2 QUICK DECISIONS

Every leader needs to recognize that many decisions can and should be made quickly. The decision to work 30 minutes later than normal to keep a project moving, the monthly renewal of a tested service that's working well or a spontaneous decision to send an interesting news article to a coworker are all scenarios that pop up in everyday life. They don't require extensive thought and, if we spent copious amounts of time thinking through quick decisions like these, we wouldn't be able to accomplish what's required of us.

In some situations, though, a quick or routine decision might deserve more of your time and attention than you realize. For example, a recurring charge for a delivery service or the decision to use the same platform and template for the weekly team meeting that you've been using for years may happen naturally and with relatively little thought. But there may be a missed opportunity hidden in the routine. To identify instances like these, conduct or delegate routine process audits on a quarterly or annual basis. These audits will allow you to catch routine processes that can be improved but not be unnecessarily delayed on a regular basis.

7.3 BIG DECISIONS

The bigger decisions associated with your role as a leader share should be approached with similar considerations to those used in a traditional work environment. Consider the big picture questions associated with collecting the necessary data. You might consider these "pre-steps" for your decision-making process that you should follow when making any big decision.

- Gather all of the facts needed to make your decision (and make note of information you need but don't have)
  - External and internal influences
  - Upcoming events related to the decision
- Identify your own bias (if applicable)
- Determine who (if anyone) should help you work through the decision-making process

Once you've completed the data collection process, you're ready to solve the problem. The six-step problem-solving process includes:

1. Define the problem.
2. Define success criteria.
3. Determine root causes.
4. Explore possible solutions.
5. Select a solution.
6. Implement the selected solution.

You'll follow each of these steps differently within any given scenario. Specific details may cause steps in one scenario to be more challenging than the next. For example, if you are simultaneously helping to resolve a conflict between two coworkers and attempting to meet a scheduling change from one of your vendors. At the very first step, you can see

how accurately defining the problem of employee conflict is likely much more complicated than the scheduling change. Conversely, the best solution to the employee conflict might be obvious by step 4, whereas choosing how to resolve the scheduling conflict could be more complicated.

Each problem is unique and each step within the problem-solving process has to be considered carefully. The six-step guide helps ensure you don't miss opportunities or potential pitfalls by helping you be thoughtful in your process.

7.4 SPECIAL CONSIDERATIONS FOR REMOTE TEAMS

Each item on the lists above is part of a process that should be considered when a leader is making a decision, within any industry and with any size team. Each point is also a valid consideration for anyone in a traditional or virtual team environment. However, within each section, a few additional points should be considered by the leader of a remote team.

- **Overcoming isolation**. A challenge within many virtual teams is maintaining a feeling of connectedness, especially when it comes to making decisions. Leaders can use decision-making to make good choices, but if it's done collaboratively, it can also help team members feel like they are part of goals that are bigger than their role on the team. It's win-win; you get help making decisions and the process acts as a team-building activity.
- **Out of sight, out of mind**. We have reminders in our environment every day that help us get things done. The cat jumps on your lap and you remember you need to pick up cat food tomorrow. You slip on your kitchen floor and you remember you still have a safety training you need to watch this week. These environmental cues come to a traditional work environment throughout every day; you're unlikely to forget to invite Jim to a meeting because you walk past his desk on the way to the bathroom. You see Pam at least twice a day when you go to get coffee from the break room. Remembering to include remote team members in the right problem-solving discussions (not necessarily every discussion) requires a leader to operate with an increased level of awareness of the team. To start, a team leader may choose to keep pictures and biographies of virtual employees in a highly visible location as a reminder of the talent available on the team.
- **Maximum value of brainstorming**. Have you ever been part of a brainstorming session that ended (often successfully) so far from the initial ideas submitted, you aren't even entirely sure how you got there? That's how brainstorming is supposed to work. A common misconception is that the biggest benefit of

brainstorming is solely the number of ideas that are presented, theorizing that the larger the number, the more likely there is a solution. Brainstorming yields the best results when one person's idea sparks a new or deeper understanding of another person. To foster this in a remote work environment, leaders have to use the right technology (like Google Hangouts or Skype as a group) and know how to foster a group discussion when physical space isn't shared.

7.5 DECIDING WITH OTHERS

Whenever a group is trying to make decisions – in remote or traditional teams – there are a few critical factors:

1. It's important that everyone *feels* like their opinion has been heard.
2. It's important that everyone is *actually* heard.
3. As a leader, it's often your role to encourage everyone to speak up!

In a virtual environment (especially if the team is new), this is often accomplished through structure. It's also often resisted because of the structure required to be successful! Leaders with good intentions often desperately want to be supportive of employee development and run an inclusive work environment. To be genuine, does this have to constantly be "coaching in the moment?" Consider these alternatives:

- Schedule recurring meetings with time on the agenda for team discussion and decisions.
- Invite team members to bring items to the meeting. They don't always have to only provide solutions; they can ask for help as well.
- Share a discussion template (similar to the six steps problem-solving resource we just reviewed) to help people understand the process and how they can contribute.
- Remind people to share decisions and ideas and thank them for both, taking the opportunity to remind them that – though they each offer unique areas of expertise – they can be most successful if they learn to pool resources and grow as a team.

Every process you put in place will need to be nurtured. Like any new skill, it will take time for it to become routine. As a leader on a remote team, you have an excellent opportunity to remind and support team members as they each learn and find their best way to contribute.

8 FINDING FLOW IN YOUR TEAM'S SCHEDULE

A remote worker's schedule will affect their motivation – and not in the way you might initially think. Yes, being overworked or failing to set boundaries between work and home time will negatively affect the remote workers' energy level. But we're going to focus on the benefits of creating and sticking to a work plan.

Your decision to create and stick to a timeline of events that details what you will accomplish by when will help you manage your stress, make good choices, and in general, feel more able to tackle what's expected or you each day. Once you have the right routine down, you'll experience something success researchers call "flow."

8.1 FLOW IN THE WORKPLACE

Have you ever considered what work you find interesting? Which projects, accomplishments, and tasks you find most satisfying? We often move through life taking new jobs and participating in volunteer or other extracurricular activities that we enjoy without even realizing *why* we enjoy them. We know that they generate positive feelings, so we're drawn to the activity, even if we can't explain why.

In the 1970s, Mihaly Csikszentmihalyi introduced the theory of "flow" related to workplace happiness. The theory states that a person is happiest when they experience a perfect *balance* of challenge and skill. The key term in Dr. Mike's theory is balance. Csikszentmihalyi's research found that people weren't happiest when they had mastered their job and could do the work without thinking. Nor did he find the greatest amount of happiness when people were in a job where they were constantly stretching their skill set to complete tasks successfully. Over and over again, he found that skill and challenge had to be balanced.

These findings surprised some people. After all, would you think that mastery of your work—making your everyday work easy—would be positive? That isn't the case. Too familiar or too challenging, and you're unhappy at work.

A person can be out of flow in two ways. They could experience anxiety if they're in an environment that is too challenging for their current skill set. For example, a recent accounting graduate may take an entry-level job in a small firm and, six months after he begins, get promoted to management because his boss quit. In some instances, this recent

grad may be a natural leader or have had previous management experience, so he feels equipped for the job. For most people in that situation, the challenges of the work would far exceed the skills they have. The transition and day-to-day work would cause a level of anxiety that would decrease productivity.

A person could also find themselves in a role in which their skills exceed the challenge of the work they're doing. Consider a person who was laid off from one job and accepted a position for which they were drastically over-qualified. Or, to gain entry to a desirable company, a person may accept a position that does not challenge them. However they arrive, individuals in that situation are bored and biding their time until a better position comes along. Those individuals are rarely working up to their potential.

8.2 FINDING FLOW IN YOUR SCHEDULE

Considering what flow looks like in the workplace, how quickly could your team's plan get knocked off track if you don't carefully monitor their progress and schedule?

- If they set goals that are too difficult, they may feel unnecessarily anxious.
- If they set goals that are too easy or drawn-out over too much time, they may get bored.

The difficulty with balancing the right amount of challenge and skill is that every work environment is different and every team – and every person – will succeed on their unique timeline. The key to finding flow is to create a plan based on industry recommendations, past experiences, and team goals, and then monitor your progress. A remote team needs to routinely update their progress and adjust as needed. If you approach goal setting and check-ins as a communication tool designed to help everyone maximize their workflow, they will honestly report their progress. And the more honest they are, the faster you'll get the results you want.

Remote workers set up for success will feel buoyed by the challenging goals without feeling anxious about the risk. Over time, you'll uncover areas where they may need more help or where goals need to be adjusted. Eventually, you'll help everyone find flow in the workplace.

9 PUTTING IT ALL TOGETHER

In every company there are basic business expectations. They may vary between industries and evolve, but a few can safely be considered pillars that are unlikely to ever change:

- Be profitable.
- Treat your customers (internal and external) well.
- Operate on the cutting edge of your industry.

Each of these elements may be supported in different ways within different organizations, but they are all vital to an organization in any industry. A company can't survive (for long) if they aren't profitable. Unhappy employees and customers will eventually leave an organization, and without either or both, the company will fail. No matter your industry, if you are not creating cutting-edge products, offering industry-relevant services and using up-to-date resources, you're bound to eventually lose to your competitors. These are business principles in their simplest form. And remote teams need to understand and support these principles to be successful.

9.1 THE LEADER'S ROLE

Remote team leaders are responsible for many things, not the least of which includes keeping employees connected to the business. It's easy for any employee – and especially easy for the remote employee – to get caught up in their contributions and lose sight of how their work influences the overall success of the organization. This can lead to poor decisions and a lack of motivation.

Consider a situation in which the graphic designer for a virtual team doesn't understand the importance of profitability, treating internal and external employees well and being on the cutting edge of the industry. What decisions might she make that could negatively impact the organization?

1. She might make a professional recommendation that the organization purchases expensive software that is a nice addition, but not necessary. (Unnecessary expenditures decrease profits.)
2. She might delay responding to coworkers if she doesn't believe a timely response is important. (Perceived or real "slow" responses can be frustrating and lead to an unhappy work environment or disappointed customer.)

3. She might be "stuck in a rut" and content to employ the same designs, the same way, over and over again. (Eventually, everyone will notice if your content is stale. Customers will lose interest and competitors will take advantage of the opportunity.)

When remote leaders consider what their team needs to know about the business, they often focus on their immediate environment or what the employee can easily and obviously influence. This is an understandable choice and even an important *part* of the decision. But as you can see in the example above (that can likely be created for almost any employee), separation from the big picture can quickly lead to unnecessary obstacles.

As a remote leader, facilitating conversations around those discussions can help individual team members develop professionally and feel more invested in their organization's success. You can facilitate these discussions at team meetings, training sessions or during individual conversations. Whatever group size you have, try to follow a few basic rules. This will help to ensure that people are understanding the information you're sharing to the best of their ability.

- Set ground rules (even if there are only two of you in the conversation) that encourage questions. Let employees know you *expect* them to have questions because you'll be sharing a lot of information and their participation will promote a deeper understanding for everyone (including you).
- Use visual support whenever possible. This may include charts and graphs or a demonstration of a tool. With any topic, consider what you can *show* the employees you're working with to help keep them engaged.
- Have them apply what you've talked about to their environment whenever possible. If you're talking about budgets, have them look at what they've spent and how they can measure what the company has earned as a result of their efforts. If you're exploring industry trends, ask them to research trends in their area of expertise and share what they learned in the next meeting. Help them make the content relevant to their business.

How a virtual team's need to understand their business evolves will vary greatly depending on the team, organization, and industry. For example, if you have a team of virtual accountants, you can safely make assumptions about their level of understanding of budgets. Similarly, a group of professionals who each have over a decade of sales experience is likely to have as many (or more!) ideas to share the team leader.

Even with the infinite number of unique differences between teams, there are several questions and learning approaches that can be applied to most scenarios.

1. **Foster a culture of discussion**. For most adult learners, one of the best ways to deeply understand new content is by applying and/or talking about it. If you ask questions and encourage discussion, employees will learn that meetings and training sessions are safe places to explore what they're learning.
2. **Develop individual relationships, roles, and responsibilities**. As you get to know team members, you'll learn about their strengths and what kind of work they enjoy. Ask team members to contribute to group projects and discussions based on those strengths.
3. **Don't be the expert**. As a leader, it's easy to think you're supposed to have all the answers. Identify opportunities for team members to lead projects or facilitate training.
4. **Require specific individual feedback from team members when learning new material**. If you present content that has a potential real-world application for your business, ask each team member to reflect on what they've learned and share their ideas. Avoid fruitless or tedious tasks; ask them to apply what they've learned in a meaningful way.

There are many excellent online resources for learning more about input/throughput/output, financial analysis or any other terms listed. The successful virtual team leaders will recommend those resources to individual employees interested in asynchronous learning. They can also be used to supplement learning and start conversations as a team.

ENDNOTES

[i] https://www.conference-board.org/dna-engagement2017/

[ii] https://www.gallup.com/workplace/236927/employee-engagement-drives-growth.aspx

[iii] https://www.hays.com/press-releases/us-workers-willing-to-compromise-on-salary-for-the-right-benefits-company-culture-and-career-growth-opportunities-2030744

[iv] https://www.kornferry.com/press/breaking-boredom-job-seekers-jumping-ship-for-new-challenges-in-2018-according-to-korn-ferry-survey