Managing Remotely Pt1 - Addressing Physical and Organisational Distances

# Challenges of working and managing remotely

Many of the challenges you face are the same as those of managing someone in your office, plus additional challenges due to working remotely where you may be working at different times and you can’t see each other. As a manager, you need to understand the challenges from your own perspective as a manager and also from your worker’s perspective, so you can adjust the way you work to create a positive environment that supports both you and your team members to be productive. Many people find they can’t match their high performance in their usual workplace when they are working from home and need to make adjustments to raise their performance. You as their manager can play a large part in making that successful for them.

Some of the typical challenges specifically around remote working include:

* **Lack of organisational infrastructure, systems and processes** for operating remotely. E.g.: (not an exhaustive list!)
  + Staff don’t have suitable broadband/wifi/computer and may be trying to do everything via their mobile device.
  + No consistency in how you communicate or access information from the office.
  + Inability to access files and other information at the office, whether paper or digital.
  + Inability to contact colleagues who are also working from home.
  + Issues with security around accessing work intranet systems.

* **Lack of face-to-face supervision**: *“out of sight, out of mind”* 
  + Managers and supervisors worry that their people are not as efficient or effective when you can’t see them at work, although research often shows that the opposite is true. Managing someone who sits near you is very different than when they’re remote and it is more difficult when they’re the *only* remote person who you manage.
  + Staff report a lack of managerial support and communication and feel their manager is out of touch with their needs and are not supportive or helpful for them to get their work done. Staff frequently report they feel
    - micro-managed
    - less valued
    - their manager doesn’t trust them
    - lack of opportunities for development

* **Increased time and effort to locate information and to get anything done**.
  + Information flow takes longer when people are not working at the same time, you need to wait for email replies instead of walking to ask a colleague at a neighbouring desk/office. It can feel like a large obstacle for someone working from home, especially when they are used to working in the office and/or most of their colleagues are working in the office.
  + Lack of productivity.
* **Information inequality.** 
  + *Feel ‘out of the loop’*. Remote staff are at a major disadvantage to staff in the office as they miss most of the discussions that happen in the office, both in formal meetings and in informal conversations at desks, the coffee room and hallways. This contributes to remote workers feeling isolated and out of the loop.
  + *Lack of “mutual knowledge” This* is the kind of knowledge that gives context to the communication you have with people. For example, when you can see a colleague at work is having a bad day, you will know they are stressed and understand that a brusque email is more due to their stress than something personal to you, your work and/or your relationship with your colleague. Without this understanding of the context and their current situation, remote workers are less willing to give colleagues the benefit of the doubt in difficult situations. They are more likely to take offense or at least think their colleague is unprofessional.
* ***Social isolation.***
  + One of the most common complaints about working from home is loneliness. Informal social interaction at work is important for wellbeing and a sense of belonging to the team and organisation both of which are important for engagement with work and high performance.
* ***Distractions from home*** When there is a sudden transition to working from home, you as manager will need to support your people to decide how to set up an effective space with the resources they have at this time.
  + *Sub-optimal work-space at home*. When working from home is properly planned in advance, people can be supported to make effective arrangements for a dedicated workspace, childcare and the infrastructure they need at home.
  + *Family expectations.* When you normally work in the office, you and people around you expect that when you are at home, you are available for home activities and giving attention to your family. Transitioning to work at home is difficult when you have to change your habits and behaviour at home, including how you respond to people requesting your attention.

# Virtual Distance

These challenges arise because of the separation and distance between the office and the person working remotely. We usually only consider the geographic distance as the barrier that gets in the way of working the way we do in the office. However, research shows that virtual distance actually comprises much more than the geographic separation.

## Virtual Distance = Physical Distance + Operational Distance + Affinity Distance

***Physical distance*** includes:

* **Geographic distance** Includes walls, rooms, buildings, departments as well as in across the country/world. When we can’t see each other working, we need to change the way we feel confident that the appropriate work is being done by our colleagues and people we manage.
* **Time** Time zones and also schedule differences e.g. shifts or flexi hours for people working in the same city and country. When we are not all working at the same time (Synchronous), we need to get used to working, at different times (asynchronously) which has implications for operational processes.
* Differences in **organisational affiliation** – this can include different departments within an organisation, especially when they operate in silos.

***Operational distance*** contributes to daily noise that gets in the way of fluid meaningful communication. You can’t use exactly the same way of working, systems, processes, tactics, that you use in the office when you work remotely and when you try to do things the same way, you end up feeling frustrated, and hitting barriers. It requires thought and planning to create an effective working space, new infrastructure for communication and agreed ways of working, which will prevent or at least reduce miscommunications, lack of access to information, and technical problems.

***Affinity distance*** is caused by issues that block development of deeper, longer lasting, and substantial relationships built on shared values and important human interdependencies. People feel less connected to team members, don’t know what is going on and feel out of the loop. Relationships become weaker when you are, not taking enough time for social interactions that you would get in the five minutes hello or quick cup of coffee when you meet in the office or at physical team meetings. These things are ***very important for building trust*** which is vital for effective team working (see the section on the Lencioni Model).

# The Costs of Virtual Distance

When you are managing remotely, the challenges you face due to virtual distance can result in unintended and unwanted effects that have negative consequences on productivity and also how you feel about your work, your engagement and your wellbeing at work. The key to making a success of managing remotely is to act and manage in ways that reduce virtual distance.

When virtual distance is relatively high:

* Innovative behaviours fall by over 90%
* Trust declines by over 80%
* Cooperative and helping behaviours go down by over 80%
* Role and goal clarity decline by 75%
* Project success drops by over 50%
* Organisational commitment and satisfaction decline by more than 50%

Ref: *The Subtle Ways our Screens are pushing us apart* by Karen Sobel-Lojeski in HBR April 2015. <https://hbr.org/2015/04/the-subtle-ways-our-screens-are-pushing-us-apart>

There are many things you can do to improve how you manage remotely and this masterclass focuses on two things that are vital foundations for managing a high performing team with high wellbeing.

* TRUST
* Role and Goal clarity

When you improve these, you can improve on the other costs and reduce your challenges.

## Reduce the costs of virtual distance by planning how you work together remotely.

Remote workers do not have the office structure / organisation or infrastructure that you have in the workplace. Does your organisation already have planned processes and strategy for working remotely? Be mindful of synchronous working (when we are all in work at the same time, which is the typical structure for many organisations) and asynchronous working, (when people are working at different times), which impacts on how you can interact with each other and it can take longer to get replies to queries etc. To be effective, you need to plan how you work and send requests for information from each other, so that your project is not held up by a key person not being able to respond until later or the next day.

**Brainstorm ideas of things you can do as a manager to clarify how we work as a team or as manager & direct report, and raise role and goal clarity.**

* What can you do to raise your own clarity about goals, tasks and elements of tasks, and who should do what?
* What is needed to get full clarity and focus on the shared/overall objective, purpose and goals for tasks?
* How can you specifically help your team members to get clarity around their role, their tasks and how these fit in with the overall team purpose?
* What clarity is needed around processes and the WAY you work together? Refer to the Working Remotely module as well.

## Work planning – Asynchronous and Synchronous working

Get familiar with asynchronous working and clarify how you collaborate with autonomous work between times you meet.

How do you shift expectations from being on call during the standard work hours as you would be in the office and move to asynchronous working patterns? Do you need a phone call or can you text/message/email so they can they respond in their own time? It requires clarity on when you are each working,

Arrange synchronous work – meetings, calls, daily check-ins etc., for the times everyone’s schedule overlaps. When arranging full team meetings, ensure that timings are fair to all – if some are inconvenienced by meeting times, move times so that it is not always the same person who is inconvenienced. Plan meetings/synchronous work to share the inconvenience equally.

## Establish “rules of engagement” which are shared and transparent with the whole team

**S**et expectations for the frequency, means, and ideal timing of communication for your team. Creating a Team Charter (see the leadership module) may be useful so that everyone feels involved and clear about how we will work together.

* Do we need to work at the same time (Synchronous working)? If so when and why is it important?
* When can we work flexibly and it is not required that we are working at the same time (Asynchronous working).
* How do we share schedules of availability for synchronous working and asynchronous so we have full clarity on when each team member is working?
* Through a 121 with each person, establish when is it ok to expect them to be ‘on call’ for instant queries by team members and how do you contact each other then? (E.g. Phone calls, text message, chat function, Video calls/conferences/zoom/skype / Microsoft teams) When are your ‘open door’ times for your team members to call you?

### Create effective communication strategies

Clarify ways to communicate, Identify and choose the best tools to communicate and when to use what. Don’t just rely on email!

* Ask who, what, when, where, and how about the message or information you need to convey and recognise how much context the other person might need to fully understand your message.
* *Before each communication ask: “What do I want the receiver to do after I convey this message?”*

E.g., A simple reply – is email or chat better and they can respond in their own time? A more complex response that needs discussion – perhaps a phone call is better? An urgent response required –maybe telephone or chat, depending on the complexity. Detailed information being shared – perhaps email attachment or to keep all members of the team informed at once, add to your platform where you share information – e.g., Trello, Teams etc.

Examples of communication tools for different contexts.

* Telephone: landline, VOIP, mobile, Facebook messenger calls, WhatsApp calls
* Chat: Slack, Twist, Google Hangouts
* Project management: Trello, Jira, Asana
* Web and video conferencing: Google Meet, Zoom, Cisco WebEx
* Collaboration and prototyping: Invision, Marvel, Adobe XD
* Scheduling: Calendly, Doodle
* Workflow automation: Zapier, Microsoft Flow

What support do your team members require in order to use these communication strategies?

E.g., software and hardware required and who has what available when working from home (e.g., IT, computers, laptops, access to organisation intranet/sites, wifi/broadband capacity etc.).

# Tips for how you manage your people remotely

As Team Manager, clarify for yourself, how you manage your team remotely to give yourself confidence in clarifying with the team how you work together remotely.

* ***Arrange regular 121 meetings*** with team members and direct report
* ***Clarify purpose, tasks/goals etc. and their role*** during remote work (lockdown) so that each person is clear about their tasks and role, and how they still fit into the team overall while they are not coming into the office.
* ***Clarify expectations and Agree boundaries***. You can’t expect to work same way as in the office, not just because of the lack of infrastructure of the office around you, but also because of other commitments (especially during lockdown when schools were closed and parents had to fit in schooling and family management as well as work.) Reflect and decide on what you do expect of your team regards the number of hours and realistically what can be achieved for focused work. For example, people often work from 9am to 5pm in the office. Do you expect your people to work the same number of hours at home? If not, how many effective hours of work are you expecting of your people when working from home? How well do you know their circumstances for working? Do they have a quiet workspace that supports effective work or do they share the space with family members, working from the sofa or kitchen table? What impact does that have for their concentration?
* ***Clarify how you know that your team members are on top of their work***. When you are in the office, you can see each other. You team member can see you are there for them, and can ask queries as needed. You can see they are doing the work. But when you are remote, you need other ways to know that the work is being done and is on track. Think about how you can shift to noting the work outcomes and reaching agreed way points by agreed time points instead of the visual cues and time in the office.
  + Plan tasks together and arrange in advance when they will check-in and report back to you. One approach for this is to ask your team member how they plan to do the task, so that they are planning it, and telling you how it can be seen to be on track. E.g. when you are delegating work, start with why the work needs to be done, what the desired outcomes are, and then ask their thoughts for how to do it and have a discussion about how you can recognise how their approach will be successful and on track. Agree boundaries for decisions i) they make on their own and report to you and ii) they should ask first. Agree times when you have an open door for them to just pick up the phone with any queries or to talk through an idea. Very often it feels quicker simply to delegate by saying what needs to be done in more detail yourself but that leaves you uncertain of how committed they are and how well they have understood the plan, which often then leaves you feeling you need to keep checking in resulting in your people feeling micromanaged.
  + Benefits of this approach
    - Raises your confidence as manager as they are telling you how they do it, and how you can see you are on track, and there is a plan of when they are reporting in with agreed boundaries for decision making.
    - Raises their motivation, sense of ownership as they have shaped the plan of how to do it – what, when, etc. and also the plan on what & when to report to you so you see it is on track.
    - Raises their perception that you are there to support them still, even though they don’t get to see you.
    - Reduces micromanagement.

## Establish a structured daily check-in meeting with the whole team

A daily check-in is a **brief, regular and predictable catch-up** that keeps team members informed of important information, helps hold people accountable, and allows for sharing of collective intelligence. It is a forum in which your people know that they can consult with you, and that their concerns and questions will be heard. This is a separate event to your 121s and team meetings and is designed to be quick, motivating and keeping people focused on the shared team purpose and goals.

Daily check-ins are vital for addressing the affinity distance aspects of remote working (see next section too) because they keep everyone in the loop so they feel they are a valued member of the team, know what’s going on, who is doing what, and know that others are also pulling their weight even when they can’t see them at work.

Successful remote managers establish a daily call with their remote staff.  If your staff work independently from each other, you can have a series of one-on-one calls. However, a team call is vital if their work is highly collaborative, and an advantage even if they work independently to improve their sense of belonging to the organisation and seeing the context of how their independent work contributes to the whole picture.

Many delegates at my working remotely masterclasses commented that they thought this was far too much at first and after a couple of weeks really appreciated these daily check-ins. They realised what a difference check-ins were making when they saw colleagues in different teams that don‘t have them feeling isolated and unsure about what others are doing.

**How to hold a successful check-in**

* IMPORTANT – find a time that works for everyone’s schedule, and/or vary the time so that all share the burden of inconvenience equally over the week.
* Keep it short – 15 to 20 minutes if possible.
* Start with WHY - a brief reminder about the purpose for your team/your project. What are we all here for?
* Everybody, including you as the manager/team leader says 1) How they are today (feeling/state) 2) Highlight of what they achieved yesterday and 3) top priority for today. Aim for about 1-2 minutes each.
* Make it easy for everyone to ask questions.
* Share important information that everyone should know – Brief headline here with more details shared separately / later if still to come out.
* Don’t problem solve here – have someone take it on to problem solve or put it on the agenda for a team meeting.

### Benefits of a Daily Check-in

* Creates the foundation for a positive culture that recognises what each person is contributing.
* Shows you as leader /manager care about them as a human and have empathy for them. Sharing your own feeling shows you are human too and that you are not expecting unreal positivity, but choosing to acknowledge the real situation with a positive mindset and not focusing on negatives.
* Asking each person to say how they are that day helps to raise mutual knowledge about the context of your colleagues. Understanding their emotional state helps to reduce misunderstandings and miscommunications about work, which helps you collaborate more effectively together.
* Everyone knows what everyone else is doing: They can see they are also playing their part and can see how their role fits with others, and puts their work in context of the team overall,
  + Maintains morale knowing you are all pulling together
  + Everyone feels they are kept in the loop – especially when you give a heads up about important information coming out soon. Usually information is shared at a meeting when someone is missing and they feel excluded because they did not hear about it.
  + Raises inclusivity.
* Opportunity to flag up something that has gone very well, which would be useful toad to the agenda for a team meeting to understand what made it go well, and how you can transfer that learning and understanding to other work.
* Opportunity to raise any niggles before they become large problems, to explore in more detail and resolve at a longer meeting if they can’t be resolved immediately.
* Reduces operational and affinity distance, builds trust, strengthens relationships and improves productivity.