

Managing Remote Employees

*How to maintain a successful team
of employees in multiple and remote locations*



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Course Outline

Welcome to the Managing Remote Employees course. In this course you will learn the unique techniques to best manage a team of remote employees.

The term “remote employees” means employees that do not work all in the same location with each other or their supervisor/manager. These could be employees spread out across multiple offices, who work from their home, or work on the road or in the field. When describing these teams, various terms are used such as: teleworkers, virtual teams, field employees or remote teams. All of these are synonymous and applicable to this course.

If you often have to pick up the phone to communicate with your employees, and do not see them on a regular daily basis, then this course is for you.

This course is laid out into 9 modules with multiple sections in each that contain a combination of various content such as videos, interactive e-learning, workbook exercises, and real life exercises. To help you more easily move through the content, you will see the specific sections indicated in the workbook, and numbered in the online files, so you know the best order to move through them. However, if there are specific topics you’d like to skip or jump ahead too, you can do so as well.

You will see the following symbols throughout the book to better guide you through the course:



Watch – this indicates a video or e-learning to watch from the files



Exercise – this is an exercise in the course workbook to complete



Interactive Exercise – an interactive video or software tool to use from the files



Real Life Exercise – this is a chance to apply your new skills directly to a work situation now

As well, throughout the workbook, you will find information that follows along with the videos or provides some additional insights.

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Module I – Benefits of Remote Employee Management

Section 1.1 – Intro & Benefits

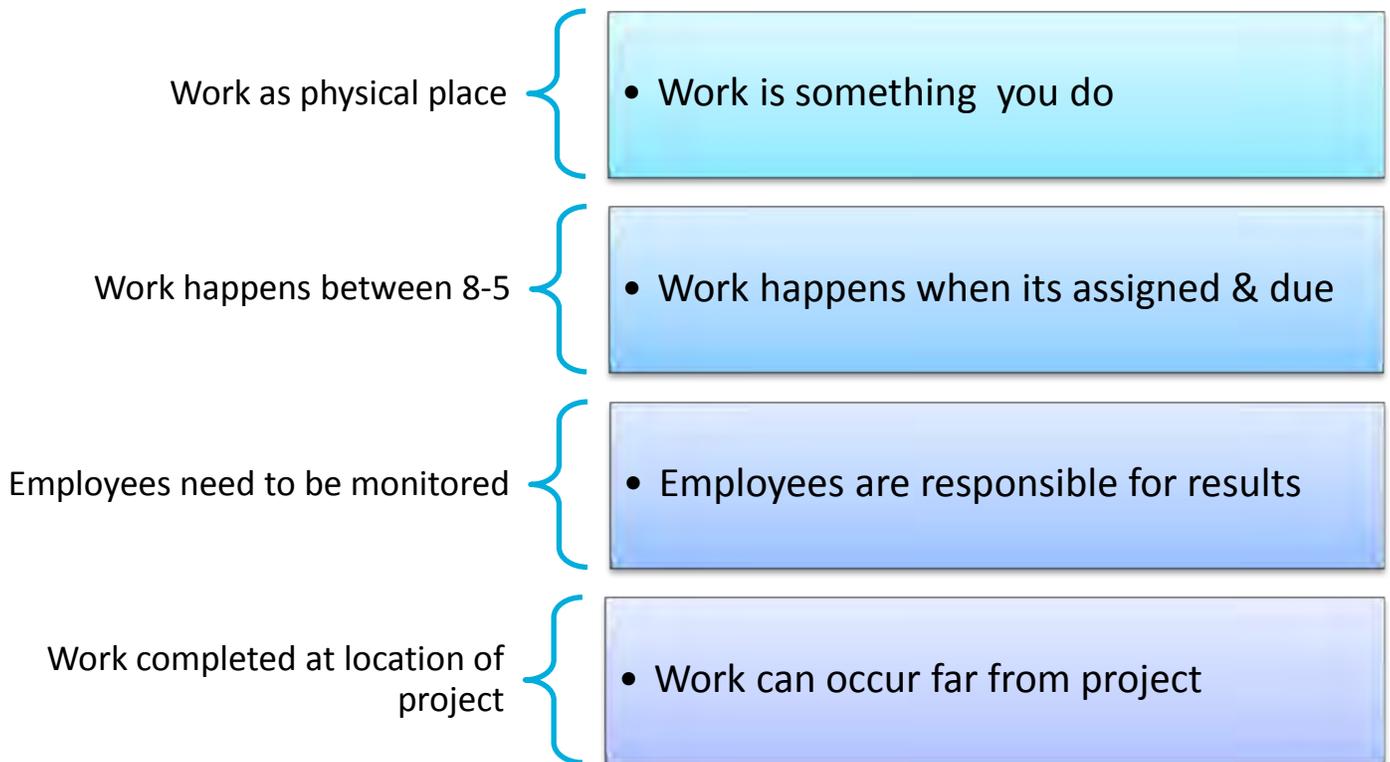


0. Watch: REM Training Intro

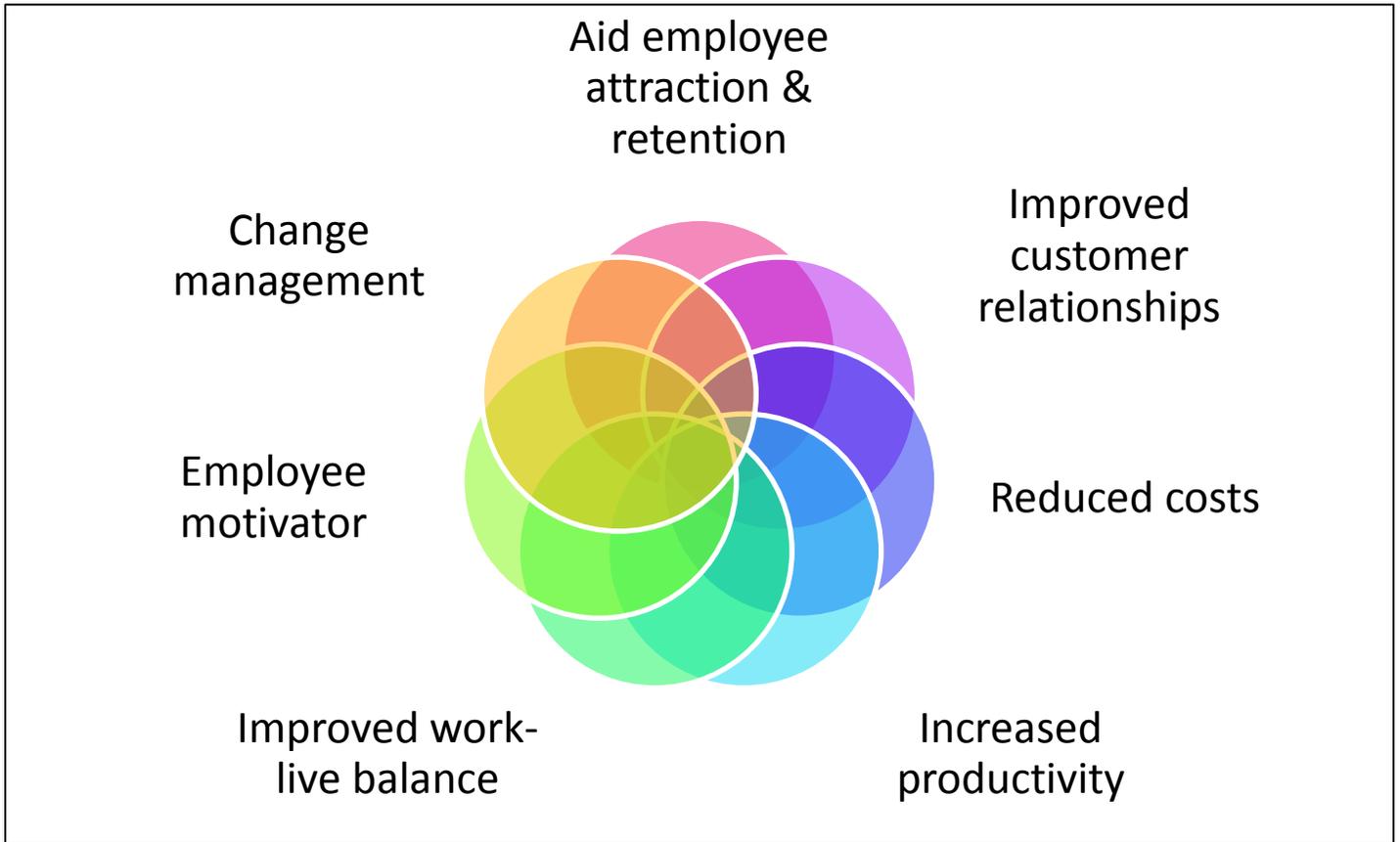


1. Watch: Intro, Changing Assumptions

Changing Assumptions



Benefits of a Telecommuting Workforce



Section 1.2 - Return on Investment



2. Watch: ROI of REM



3. Use: ROI calculator (open from online files)



4. Watch: Tech Considerations

IT Considerations

- ⊙ Internet access
- ⊙ Access to shared files
- ⊙ Intranet
- ⊙ IM
- ⊙ Phones
- ⊙ Web conference/video



Real life Exercise

Create your own benefits case for building a remote team structure in your company. What benefits could the company realize? What total costs could it save including turnover? What IT tools would have to be put into place?

Module II – Keeping Remote Employee on Track

Section 2.1 – What Do You Want



What do you want from your remote employees?

What are the things that you ideally want from your remote employees? Do you want them to take responsibility or be good communicators? Jot down your wish list below of what you want from your remote employees.

A large, empty, rounded rectangular box with a blue border, intended for the user to write their wish list.

The good news is that most of the items on your list on the previous page can be created by how you manage your employees. Not that there ever isn't a bad fit for the position, however, most of the things we want from our remote employees are all directly impacted from how we manage them, which is what we will cover in this course.

Section 2.2 – What Do Your Remote Employees Want



1. Watch: What employees want

10 things employees want from a remote manager

1. Coordination rather than control
2. Accessibility
3. Information without overload
4. Feedback instead of advice
5. Fairness over favoritism
6. Decisiveness but not intrusive supervision
7. Honesty
8. Concern for development
9. Community building
10. Respect



Section 2.3 - Keeping Them on Track



2. Watch: Keeping remote employees on track



3. Workbook Exercises: Finish the exercises in this section in conjunction with the video

Cascade Model





Setting the Vision

Visions for my team:

Do your vision items support the overall company vision?

Keep your vision simple – in plain English of just a couple sentences. It doesn't need to be a fancy marketing statement.

A vision includes your top level goals. Not the tasks that it takes to reach them.



Creating Expectations

Everyone wants to do a good job – they just need to know what that looks like.

Expectations for my team:

Do these items fit into the vision you defined? Do you need to re-define your vision?



Communicating Expectations – What’s In It For Me

Expectations

WIIFM

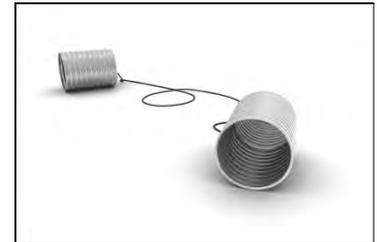
Module III – Communication

Section 3.1 – Communication Channels & Tools



1. Watch: Communication Techniques Intro

2. Watch: Communication Channels



Communication Vehicles

Type	Frequency	Use For
E-mail	Daily	Feedback, information notices, best practice ideas, praise
Phone	Weekly	Team calls for goals, info and building team community, one-on-one development
Face-to-face	Every quarter	Development, motivation, building team community

Create virtual “water cooler” opportunities for employees to communicate with each other to build your team culture and community.



3. *Watch: Death by Meeting*



Avoid Death by Meeting ¹



Three large, empty, green-outlined arrow-shaped boxes pointing to the right, intended for notes or observations.

¹ Lencioni, Patrick. **Death by Meeting**. Wiley, John & Sons inc., 2004.

Section 3.2 – Accurate Communication



4. *Watch: Assumptions vs Facts*

Grounding an Assessment ²

Be sure to check the following when you are making an assessment:

Clarify why you are making an assessment

Clarify your standards

Purposefully define actions or events (facts) that support your assessment

Purposefully define actions or events (facts) that disprove your assessment

Check your mood

Get feedback



5. *Assumptions vs Facts E-learning Exercise*

² Brothers, Chalmers “Language and the Pursuit of Happiness”, New Possibilities Press, 2005.

Module IV - Building Team Strength

Section 4.1 - Clear Communication



1. Watch: Making Requests



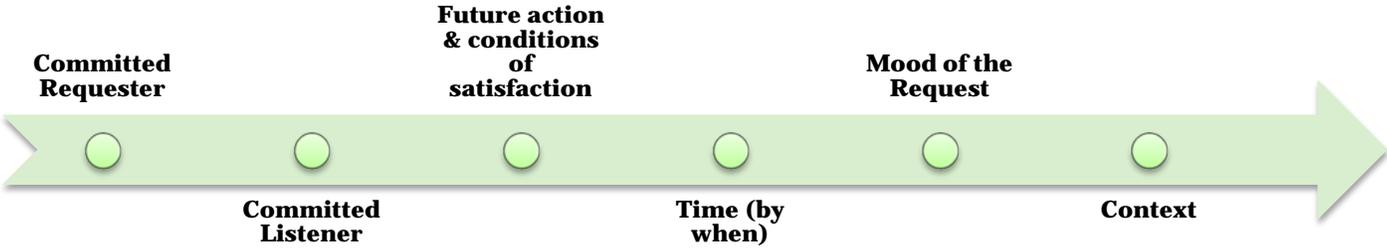
2. Making Requests E-Learning Exercise

Requests - Change your requests - Change your identity

Managing teams is all about coordinating action with your team in a variety of ways. Being clear about how you make requests is one of the most powerful ways that you can use to generate the results you want from your team. So how can we make requests in such a way that people say Yes?

Let's take a look at 6 keys elements that can help make our requests more effective.

Elements of Effective Requests:



Change the verb, change the relationship – demand vs. propose



Exercise - Request Scenario

You have just closed a deal with a new client. The contract defines the deliverable date for the project as 6 months from today. You will need to be updating the client monthly about where the project stands. These reports will need to include, actual costs vs. proposed costs, changes to the original plan, where the project stands and any potential problems or challenges that were unforeseen. You get to determine the day of the month that the report is delivered to the client; however you need to gather the information from your team prior to submitting it to the client. How do you deliver this request to your team? What do you need to include, keeping in mind the Elements of an Effective Request. What are the results you are looking for?

Section 4.2 – Building Team Relationships



3. Watch: Creating a Team Community

Building Your Team's Community & Culture



Jot down some ways you can build your team's community.





4. Watch: Trust

Trust takes time to build, but can be destroyed in a minute. It is impossible to have a successful team without it. Because you cannot visually check up on your remote workforce at any moment, you have to trust that they are doing the job, and they have to trust that you are there supporting them in it.



The 6 keys to building trust within a remote workforce.

List examples of how you will use each of the 6 keys in the video, to build trust within your team.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____





5. Watch: Credibility

- ⦿ Set consistent communication schedules and stick to them
- ⦿ Keep all promises and respond to employees in timely manner
- ⦿ Take ownership of all decisions
- ⦿ Tell employees the reasons why behind decisions
- ⦿ Be consistent in your actions & reactions

“Respect is earned not demanded”



Module V – Creating Accountability

Section 5.1 – Accountability Systems



1. Watch: Accountability

Empowering Employees

Increasing Team member responsibility creates less management needs

The more you empower your employees to manage themselves, the better manager you will become. Create a self-tracking system so that they hold themselves accountable. This will generate the following benefits:



- Increased performance of your team as employees better manage themselves toward their goals
 - More self-motivation of employees to reach their goals
 - Increased team respect and trust as you empower them to be responsible for themselves
 - Free up time for you to focus on higher level management items such as employee talent development
 - Allows you to “Get on the Balcony” and view your overall team’s performance and strategy

Micro-Monitoring vs Micro-Managing

Micro-managing controls every action of employees in a time consuming restraint system, while Micro-monitoring creates an accountability system, where employees self-track, and provides pre-set boundaries the employees are free to work within.

Micro-Managing – set directives for employees on how each task is to be performed (the steps and how you want them to execute them) and check on how they are doing with each step every week. Track their progress for them toward their goals, with each step, as they perform it.

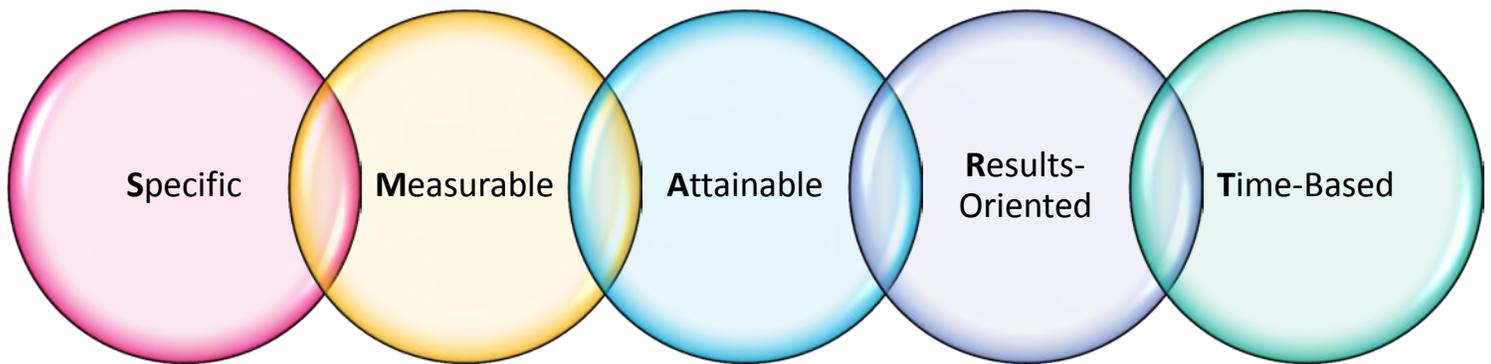
Micro-Monitoring – give employees the boundaries to work within, so they can make their own decisions on how best to complete each task and reach their goals. Show them how to monitor their own progress and provide self-tracking tools. Touch base on overall weekly progress based on their self-tracking report.



2. Watch: *SMART Goals for Accountability*

SMART Goals

Micro-Monitoring requires an accountability tracking system (Performance Matrix). All goals in the matrix should follow the SMART guidelines to be successful:





Team Performance Matrix

Goal	Details	How measured	Deadlines/timeframe

“Everyone wants to do a good job – but they need to know what that looks like to reach it.”



Congratulations! You are half-way through the course! Take a breather and a refresher and jot down some of the items you have learned so far, that you are going to incorporate into your management techniques, to make you an even greater manager.

I am a great manager because I will do the following:

Module VI – Coaching Remote Employees

Section 6.1 – Coaching



1. Watch: Manager as a Coach

Coaching vs. Controlling Management Styles

- **Controlling** - Directing and controlling a group of one or more people for the purpose of coordinating that group towards accomplishing a goal
- **Coaching** - Ongoing process of helping employees identify and overcome hurdles that prevent them from excelling

Controlling	Coaching
Demands respect	Commands respect
Pushes people toward organizational goals	Pulls people toward their individual goals
Manages from behind desk	Coaches in the field
Asks, “What can my team do for me?”	Asks, “What can I do for my team?”
Navigates challenges as they come	Paves the road in advance
Uses fear as a management tool	Uses mutual respect as a motivator
Looks for people doing something wrong	Catches people doing something right
Recognizes when people leave for the day	Never leaves for the day without recognizing someone
Talks to people	Listens to people
People will leave because of a manager	People will walk through fire for a coach

Coaching Culture

In functional terms, what does a coaching culture look like?

- Regular one-on-ones with employees
- Using individual action plans
- Being flexible
- Increasing positivity
- Focusing on what people are doing right
- Supporting career development of employees
- Servant leadership
- Doing the right thing
- Taking the time to really listen
- Deep democracy
- Being open to change

On-going Coaching - Development as a continuous process

***“Good coaches coach before, during, and after the game.”** The Distance Manager*



Reactive vs Proactive coaching

- **Reactive** – only coach employees when they make a mistake
- **Proactive** – coach on both negative and positive performance as well as looking for general learning or development opportunities. This entails “on the spot” coaching as well as “Socratic Coaching.”

On the Spot Coaching – coaching as soon as the performance issue, achievement or opportunity presents itself rather than waiting until later.

Socratic Coaching



2. Watch: Socratic Coaching

Socratic Coaching – asking questions rather than giving answers to initiate learning through self-discovery. However, questions need to not appear as an inquisition and should be open ended.

1. Designed to coach through self-discovery
2. Ask open-ended questions
3. Avoid inquisition questions
4. Focus on questions to help them find info
5. Focus on questions to teach a thinking process to enable them to make a better decision

Sample Socratic Coaching questions:

- ⦿ How will you know if you're successful?
- ⦿ How will you measure progress?
- ⦿ What information will you need?
- ⦿ What are the priorities?
- ⦿ How will you work with other team members on this?
- ⦿ What process/tools will you use?
- ⦿ Who will give input on the decisions?
- ⦿ How much will this cost? What will be the impact on the budget?
- ⦿ How will this affect quality?
- ⦿ What other alternatives have you considered?
- ⦿ How can I help?
- ⦿ What went well in this project/activity? What would you have liked to change?
- ⦿ What are our key discoveries from this project/activity?
- ⦿ What recommendations would we make for future activities based on this experience?
- ⦿ What things didn't go as well as we had anticipated? How might we avoid similar problems in the future?

Section 6.2 – Listening



4. ***Listening Intro & E-Learning Exercise***



5. ***Watch: Listening***

Listening Skills

5 Levels of Listening ³

1. Ignoring
2. Pretending - looking “interested”
3. Selective Listening - hearing only parts
4. Attentive Listening - paying attention
5. Empathetic Listening - seek first to understand, then be understood

In the book “The seven habits of highly effective people”, Franklin Covey stated that communication is the number one skill in life. He went on to say that empathic listening is the number one communication skill.

When we say empathic listening, we mean listening with intent to understand. It's an entirely different paradigm, because you are getting inside another person's frame of reference.

Empathic listening is so powerful because it gives you accurate data to work with. Instead of projecting your own assessed thoughts, feelings, motives and interpretation, you're dealing with the reality inside another person's head. You're listening to understand.

³ Covey, Stephen R., **The 7 Habits of Highly Effective People**, Free Press 2004

Do and Don'ts of Empathic Listening

Do

Reflect feeling - concentrate on and echo what person feels in your own words

Reflect meaning - restate accurately the content or subject matter of what the person is saying

Use empathic listening starters

- "What I'm hearing is..."
- "You must have felt..."
- "You seem..."

Don't

Judge - don't agree or disagree with what the other person is saying

Probe - don't ask questions to obtain information to meet your needs or curiosity

Advise - don't recommend solutions and counsel based on your opinion and needs

Avoiding "Head Trash"

Listening with the intent to reply

Filtering everything through your own experiences

- "Oh yeah, that happened to me once. . ."

Insincere desire to understand

Interrupting

Not taking the time to really listen



Real World Exercise

Listening Practice – Ask someone in your life (work or otherwise) one of the following questions and then listen with the intent to understand for 5 whole minutes. Let them talk, don't interrupt, just listen. You might just be amazed by what you discover in the conversation.

“If you could do anything you wanted, what would you do?”

“What brings you the most joy in your life?”

“What are you passionate about?”

While you are listening be sure to:

Seek to understand the other person

Ask powerful questions

Reflect feelings

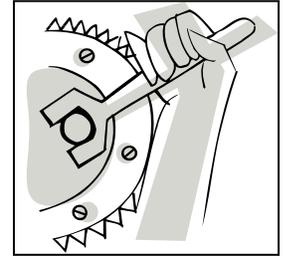
Watch your head trash

Module VII – Remote Employee Development

Section 7.1 – Coaching



1. *Watch: Training*



Training

With field teams, the speed at which you need to build competent employees is even more critical due to the higher costs of training and the less visual daily interaction you will have with them, on an ongoing basis. It is important to use effective training methods that quickly get your team members competent with minimal costs.

Initial Training –

Peer Training –

On-going Coaching –

Action Learning -



2. ***Watch: Employee Training*** – these 4 bonus e-learnings give you topics you can cover with your employees, on how to be effective remote employees.

Section 7.2 – Reviews & Feedback

Performance Reviews



3. Watch: Performance Reviews

Good performance reviews are:

1. Done quarterly
2. Initially completed by employee
3. A mutual discussion between manager and employee to discuss goals, progress, opportunities, development needs and issues
4. Honest and Candid



Sample Performance Review/Planning questions:

Looking Forward

- ❑ What will be your main focus, goals and planned actions?
- ❑ What are your desired outcomes? How will you measure your goals and actions?
- ❑ What are you planning to discover and learn?
- ❑ What resources or tools do you need to accomplish those outcomes & discoveries?
- ❑ How can I help you, what do you need from me?

Looking Back - Review

What actions did you take, what did you accomplish since our last planning meeting?
How did your actions and accomplishments compare to your desired outcomes and goals?

Desired Goals & Outcomes Review

1. Goal -

Actions/accomplishments –

- 1.
- 2.

2. Goal -

Actions/accomplishments –

- 1.
- 2.

Additional Reflections

- ❑ What did you learn/discover? Areas of growth, lessons learned, ideas for improving workflow or our business?
- ❑ What relationships did you build?
- ❑ If you had to do it again, what would you do the same and what you change?



4. Watch: Giving Good Feedback

1. Strive to maintain the self-esteem of the employee – the goal is to help employees improve, not “get something off your chest.”
2. Give candid feedback – don’t sandwich good info with bad info to try and cover it up. Let the employee know what they did correctly or incorrectly and why.
3. Don’t stockpile feedback – give “on the spot” feedback as soon as possible. Do you expect your employees to complete their projects only once a year? Then don’t provide performance feedback only once every 6 – 12 months.
4. Don’t give negative feedback in front of other employees – reserve this for one-on-one discussions
5. Feedback is not about forms – a form may be used to document feedback after the fact, but you want to keep the conversation natural
6. Don’t assume that giving people a raise is the same as giving them feedback. Feedback is a conversation about how your employee can grow and develop. Pay is about economy and does not develop your employees.
7. Don’t be afraid to get feedback on your feedback



5. Watch: Employee Issues

Handling conflict between remote team members

1. Speak with each person individually
2. Bring both employees together with you to work through conflict and help them resolve it with the following steps:
 - a.
 - b.
 - c.
 - d.
 - e.



Module VIII – Motivating Remote Employees

Section 8.1 – Motivation



1. Watch: Motivation

Movement Vs Motivation

1. Movement

- External Stimulus – carrot & stick approach
- Takes continuous reinforcement to maintain behavior

2. Motivation

- Internal Stimulus – pride & self-esteem
- Self-charged

Motivation Through Pride

- ⊙ Ownership/pride in client, company and work
- ⊙ Pride and appraisal in job
- ⊙ Sense of accomplishment
- ⊙ Control in job – decision making, idea sharing



Ways to de-motivate your team:

- Be autocratic – set all the tasks and do not allow the implementation of ideas that were not your own
- Do not respond to employees in a timely manner
- Put off getting tools employees need or obstacles you could help them remove – you have higher priorities on your list
- Don't communicate with your employees daily
- Don't tell them when they are doing a good job
- Don't tell them when they are having performance issues
- Don't set clear expectations



2. Watch: Turning Work Into Play

It is more effective to empower your employees to get good results than to try to force them to deliver the results.



Turning Work into Play



Exercise: Jot down some characteristics of play that make it so motivating to its participants – for example, what are the differences to someone who plays tennis for fun vs a tennis pro that plays professionally.



Exercise: Now go back and write down some ways that those characteristics can be incorporated in the work environment. If you need additional characteristic suggestions, refer to those on the following page.



1. Alternatives are available
2. New games can be played on different days
3. Contact with equals, friends, peers
4. Flexibility of choosing teammates
5. Flexible duration or time of play
6. Opportunity to be/express oneself
7. Skillful play brings applause, praise, and recognition from spectators
8. Healthy competition, rivalry, and challenge exists
9. Opportunity for on-going teams to develop
10. Mechanisms for scoring one's performance are available (feedback)

Module IX – Moving Forward

Section 9.1 – Review of 7 Keys



1. *Watch: Seven Keys Review*

Setting Clear Visions and Measureable Expectations

Increased & Clear Communication

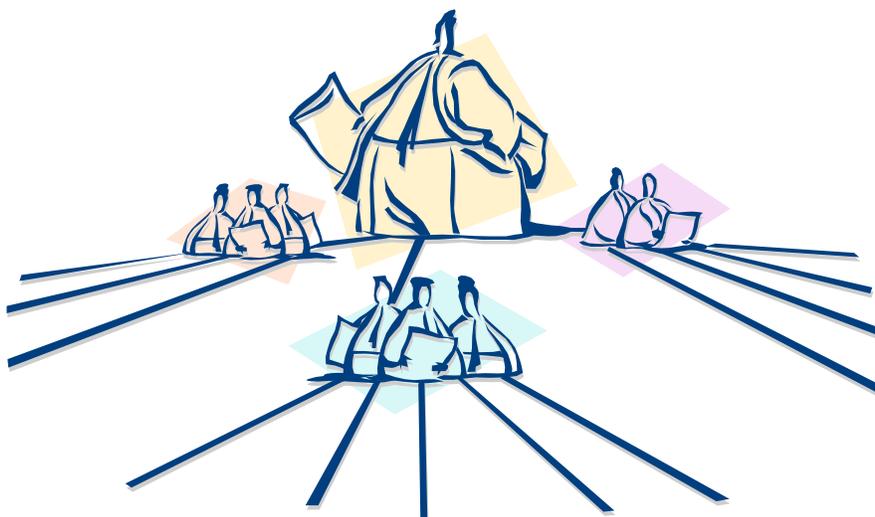
Create a Team Community

Create Trust

Manage to Goals & Outcomes, not tasks

Candid, On-going Coaching

Motivate Employees Rather Than Move Them





Take a breather and a refresher of the additional management tools you have learned in the second part of this course. Add any additional items (on page 25) that you are going to incorporate into your management techniques, to make you an even greater manager.

Section 9.2 – Next Steps



2. *Watch: Moving Forward*

Next steps to take:

1. Map your own goals (performance matrix)
2. Create a communication schedule for your team
3. Implement your team’s performance matrix
4. Implement 5 items from your “great manager” list



My Management Performance Matrix

Goal	Details	How measured	Deadlines/timeframe



Date to launch team performance matrix: _____

5 ideas I will implement in the next 2 weeks from my great manager list (on page 25):





3. Watch: Closing

Additional Suggested Reading

Fisher, Kimball and Maureen Duncan Fisher. **The Distance Manager**. McGraw-Hill, 2001.

Clemons, David and Michael Kroth, Ph.D. **Managing the Mobile Workforce**. McGraw-Hill, 2011.

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Covey, Stephen R., **The 7 Habits of Highly Effective People**, Free Press 2004

Brothers, Chalmers **Language and the Pursuit of Happiness**, New Possibilities Press, 2005.

Additional articles on **Managing Remote Employees** by Jenny Douras, can be found at
www.remote-employee-management.blogspot.com