Virtual working

Getting comfortable with the new normal

The Oxford Group

Making the shift from face to face to virtual teamworking isn't all about tech – although that is important. Instead, the most effective virtual teams use strategies which are fit for purpose – not just a carbon copy of the way you'd lead a face to face team. Having a clear communication plan, building trust and engagement and establishing a sense of purpose are all vital to making your remote team effective.

The future is now

Now, more than ever before, being able to work successfully as a team across multiple locations is paramount. While remote working has steadily been on the increase for a while, unprecedented events like the Coronavirus outbreak meant that organisations have had to up their virtual working game – and fast.

What are the common challenges of leading virtual teams?

The three key areas that can help us through what we call the three Es.

Environment
- Accepting and recognising the new environment
- Distractions and the physical challenge of working and managing from home
- Setting up the environment for success – the reality of tech, space and the tools we use to create the right conditions

Enabling others
- Keeping and developing trusting relationships at a distance
- Individual communication
- Keeping everyone up to date, understanding each other
- Team communication and avoiding isolation and fear throughout the team. Building team spirit, trust and acting as a team instead of being a group of individuals. Getting virtual teamworking right

Being effective
- Setting clear expectations and sharing our purpose
- Leading, coaching and giving feedback virtually
- Creating effective meetings and working routines
- Being effective yourself – how are you looking after yourself to look after others?

Virtual teams offer challenges to leaders, members and learning and development professionals - but they offer plenty of opportunities too.

In this three part guide, we'll share some of our knowledge, expertise and advice on leading and working virtually and how to set the scene for success.

Contents

The environment

A work from home checklist for you and your teams

It's important to remember that remote teams can often feel isolated, lack energy and even become depressed. We are social creatures, after all, and our minds and bodies need support too.

Keep set work hours (and stick to them)
It's tempting and all too easy to fall into an unhealthy work pattern and blur the boundaries between work and home hours. Adding your working hours to your email signature can help you and your colleagues to differentiate between work time and home time.

Set up a quiet secluded space in the house (if you can)
It should be somewhere you can take meetings, focus and generally be at your most productive without your children/the dog/your partner distracting you.

When will you use video on calls?
Have you got a suitable camera and will you wear different clothes when talking to customers as opposed to colleagues? And what's in the background - will it be an unnecessary distraction for whoever you're talking to?

Online meetings - how will you take notes?
If you have one screen you might not be able to use your computer to type up notes while you're in that meeting. Ask if you can record the meeting - most online meeting tools have this capability but sometimes only the organiser can do this.

It can be hard to get into a productive mindset
When working from home try to make your working environment different, giving your brain a clear boundary between work and home spaces.

Shared calendars
Giving your team access to your calendar is often a huge benefit to remote teams. Being able to see others' availability can help plan work and manage expectations.

Get some exercise!
It's likely you'll be missing a fair few steps without your commute, but this is your opportunity to use that time to do an online class, go for a bike ride or run. In the fresh air is even better.

Consider ergonomics
Check that your chair and desk are at a good height, and that you aren't reaching too far or flexing your wrists at a bad angle on your keyboard. If you can, use an external monitor or raise up your laptop and use an external keyboard. RSI is a real thing, and if you're a bit more stressed than usual you're likely to be tensing up and placing more strain on your back, neck and arms. There's more advice on the NHS website about preventing RSI and good sitting positions for working.

Wellbeing

Programmes and apps to help support you and your teams working at home

Headspace
One of the first mainstream meditation apps to hit the market, and one of the most enduringly successful, with routines you can do anytime, anywhere.

Calm
Headspace's slightly more expensive cousin, with this app you can have celebrities read you stories to help you sleep, or take advantage of over 100 guided meditations, from Never Meditated In My Life level exercises, right the way up to more advanced stuff.

Sanvello
Based on Cognitive Behavioural Therapy (CBT) this app tracks your mood, and helps you reframe the way you think about things and alter your behaviour accordingly.

Sleep Cycle
Put your phone on your bedside table before bed and this app detects motion in the room during the night, which it uses to determine when you're enjoying a lighter sleep cycle, waking you up at the most pleasant time.

The Pomodoro Technique
A simple technique for being more productive – focus on a task for 25 uninterrupted minutes, then take a short break and repeat. Every four 'pomodoros', take a longer break.

Enabling others

Keeping and developing the trusting relationships at a distance

Building 'swift' trust

Competence
Trust based on a perception that team members are competent, and so will not let me down

Openness with information
Trust based on the observation that other team members share information important to the team proactively and clearly

Integrity
Trust based on the observation that other team members maintain promises, are team-orientated, and behave towards me in accordance with a moral code

Reciprocity
Trust based on the observation that other team members are trusting and co-operative towards me

Building deeper trust

Compatibility
Trust based on background, values, approaches, interests, and objectives held in common

Goodwill
Trust based on the belief that other team members are concerned about my overall welfare

Predictability
Trust based on the observation that the behaviour of team members is consistent over time and in different contexts

Wellbeing
Trust arising from the feeling that I have nothing to fear from other members of the team

Inclusion
Trust based on the observation that other team members actively include me in their social and work activities

Accessibility
Trust based on the observation that other team members share their true feelings and I can relate to them on a personal level

Building trust in teams

When working solely online, trust becomes vitally important.

A leader needs to trust in their team to get things done, whatever their working pattern, and teams need to trust their leader to share their vision and goals and be transparent with their planning and feedback. So how do you build a high trust team?

Behaviours of low and high trust teams

Behaviour/strategy	High trust team	Low trust team
Styles of action	Proactive	Reactive
Focus of diaglogue	Task output driven	Procedural
Team spirit	Optimistic	Pessimistic
Leadership	Dynamic	Static
Task goal clarity	Team's responsibility	Individual responsibility
Role division and specificity	Emergent and interdependent	Assigned/independent
Time management	Explicit/process-based	Non-existent
Pattern of interaction	Frequent/few gaps	Infrequent/gaps
Nature of feedback	Predictable, substantive	Unpredictable/non-substantive

Getting your 1:1 communication right

Keeping everyone up-to-date and understanding each other. From setting up your collaboration tool to agreeing on check in frequency and styles.

Establish your roadmap

It's your job as a leader to ensure your organisation has these four things when it comes to remote working:

1. **The roadmap** – where are you trying to get to and what are you trying to achieve as a team and an organisation? Lay out your purpose early on and make sure it's prominent on any virtual channels you choose.

2. **Agree on rules of the road** – what rules do you need to establish to get people behaving in ways that achieve this goal?

3. **Driving lessons** – how will you communicate this to everyone in the organisation to ensure they all have the skills and knowledge necessary?

4. **Driving test** – how do you ensure your people use the technology as you intend?

Agree regular check ins

Decide how often, where and when you'd like to check in – regular communication becomes vitally important when you can't just catch up by the coffee machine. As well as more formal one to ones, consider virtual coffee time where the team can socialize and 'hang out' online, WhatsApp groups for vital messaging/fun gifs (delete as appropriate for your team culture) or even team events like watching a movie together via NetflixParty or similar. Social check ins shouldn't be overlooked.

Pick a platform – but just one

You need everyone on one platform. That's a macro rule. Whether that's Slack, Teams, Asana, Trello or any other tool, you need to agree that all core communication and conversation happens here. If it's not on the platform - then it doesn't exist. Make sure that everyone is on it, has a profile picture loaded, and of course, knows how to use it.

There are lots of other practical rules you can establish, such as conversational thread etiquette, and when it's appropriate to use hashtags, emojis and pins.

Use your webcams for more than just meetings

One of the key skills required to inspire and lead remote teams is the ability to record and share compelling, inspiring video messages quickly. While having your webcam on in meetings is a really nice way to both stay connected and maintain attention, you can also use video technology to share thoughts, updates and team news in a much more personal format than text.

Be explicit about everything you say

In a written environment, your tone of voice and body language are no longer available to you to communicate key messages, so you need to choose your words and punctuation carefully. Every adjective, full stop and exclamation mark matters.

There might not be a 'right' style, but getting comfortable using images, emojis and gifs can help give you a broader range of communication tools and being extremely deliberate and explicit with words is critical.

Be careful with private channels

There are public and private channel settings on most collaboration platforms and being fair and transparent in using these is critical to mitigate any feelings of 'in' and 'out' group tensions. Of course, a channel where confidential financial information is being discussed will be restricted to certain individuals, but avoiding any unnecessary hierarchical restrictions will reduce the sense of 'us' and 'them' festering online, just as it did when you had the leadership team sat on one side of the office and everyone else on the other.

Running virtual team sessions

In the past, virtual colleagues could often get overlooked in meetings where the majority of the team were office based. Now, you need to think virtual first. Here's our checklist on running a great virtual team session.

Try to run the session ONLY online	If ALL the audience is available in person, you could run it face-to-face. BUT if anyone needs to attend virtually, you should make it a wholly online event (eg run via Teams).
Book a room to run the session	Do not run a virtual session in a noisy office area.
Have each participant use their own headset and microphone even if they are in the same room	The audio will be better than a shared microphone. There's nothing worse than missing half the conversation because someone is sat too far away from the microphone.
Get a co-presenter (aka producer) if possible	You can reach out to the group and run the session, while the producer manages the recording, monitors the audio quality, and lines up the next poll etc. They can also provide support to people who have technical issues, and put people on mute when they need to be. And they can keep an eye on the chat – drawing out key questions and comments and ensuring they are read into the recording.
Prepare thoroughly and set up early	Upload everything in good time and practise beforehand with the technology you are using so you are familiar with its functionality. You do not want to be figuring out how things work when you have a dozen people waiting for you to do something! Also, do not try to cover too much – a maximum of one content slide every two minutes is a good general rule.

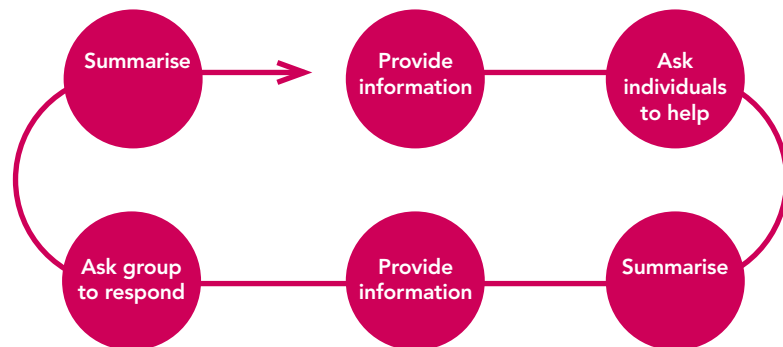|	
Start on time	It's very dull for your remote audience to listen to people getting themselves organised – or to listen to silence.
Encourage people to stay on mute and use the chat	So check the chat regularly, and invite people to come off mute if they want to expand on their question/point.
Avoid handovers	If multiple people are presenting, either present from one machine, or if you really have to, practise handing over control between each other, so it is seamless during the presentation.
Think radio	Any kind of silence is always to be avoided (especially at the start) so you should imagine you are someone on radio: keep talking and keep your audience informed about what is happening at all times. ALWAYS make sure you talk directly into the microphone.
If you are using a single microphone, position it sensibly	Make sure it is away from laptop or projector fans, and that anybody who is speaking is sitting near it (or move the microphone to where people are – but people who are presenting need to sit near each other).
Explain silence	When the meeting is starting, make it clear whether people should be expecting to hear something or not yet – maybe a slide saying 'no audio yet – and please put yourself on mute', or consider playing some music before the webinar starts so people can check if they can hear audio. Also, don't have internal conversations while you are preparing if the mic is switched on – it can sound unprofessional.
Remember it is a two-way process	If you don't have a producer, regularly pause your presentation to review and address the chat comments (you don't want dead space at the end as you look back though the chat). If you have a producer, you should still do this (as it shows you are involving your audience and can lead to interesting side conversations). If things are being slowed down by a lot of typing, encourage the person to come off mute and talk into their microphone.
Remember some people will be watching a recording	So be very clear and read out in full any questions or comments people have put in the chats.

Make the most of your voice	As it's often the only thing you have in the virtual world, with no eye contact or body language, you need to come over as dynamic and welcoming through voice alone. Don't rush it but keep the energy levels up. If you miss the cues from seeing your audience responding, use the chat – for instance, ask the audience to 'use the emoticons to let me know what you think'.
Remember all they see is the slide you are showing	So don't start talking about something that's not there. The answer? Make sure you have a slide to cover everything you are going to say or do. Use your slides to signpost the session. Plan to pose a question? Put it on a slide (even if it is going to be a poll question). It helps virtual participants know what is going on.
Remember bandwidth	Slide transitions, animations, and videos may not work very well. And don't go too fast – the audience may not be seeing what you're seeing if there's a small delay.
If it's a meeting	People don't find it easy to interrupt, so again, use the chat so people can make points or ask questions. If you are chairing, ask for input/questions by going round the virtual room so everyone is clear when they have a chance to speak.
Keep it simple	It is always worth keeping things as simple as possible in a virtual session as there are fewer ways in which you can control attention. There is a danger that participants can get lost or overwhelmed. Here's a very useful model to follow:

Summarise → Provide information → Ask individuals to help

Ask group to respond → Provide information → Summarise

If you have no choice but to run a session that is a mix of people in the room, and people online, then you must pay extra care to the points below:

- You must ensure that you give equal time to questions from online as to from the floor

- If people ask questions or make comments in the room, they should be repeated so they appear in a recording and so everyone can hear them. Conversations within the room should be kept to a minimum; equally, any conversation in the chat should be shared back with the room

- The presenter should avoid pointing to things on the screen, or turning their back to the microphone

- Anybody in the room who says something, should say it into a microphone to avoid the delay while people online wait to hear what they are saying

- Say who people are as they talk or as you refer to them.

Other ideas for running effective virtual meetings:

Have a chat window open

This allows people to post extra info or give updates when something goes wrong. It is frustrating to speak when nobody hears you and you can't even tell them that it doesn't work. A text chat next to the conf call hardly ever fails to work and is a good feedback mechanism.

Give each person time on the agenda

Along with collaborative problem solving, giving each person time on the agenda fosters greater collaboration and helps get input from all the team members. Here's how it works: In advance of the session, have team members write up an issue they've been struggling with and bring it to the table, one at a time. Each team member then gets five minutes on the agenda to discuss his or her issue. The group then goes around the meeting so everyone gets a chance to either ask a question about it or pass. After the team member answers everyone's questions, people then get an opportunity to offer advice in the "I might suggest" format, or pass. Then, you move on to the next issue. It's a very effective use of a collaboration technique that could easily be managed in a virtual environment.

Have the agenda editable to everyone available during the meeting

This way people can edit and note down things that have been said. This is beneficial as it acts as a script for those who couldn't attend and it also means that you can ensure people remotely on the call are on the ball and not watching TV.

Assign a Yoda

Candor is difficult even for co-located teams, but it's the number one gauge of team productivity. To keep people engaged during virtual meetings, appoint a "Yoda." Like the wise Jedi master in Star Wars, the Yoda keeps team members in line and makes sure everyone stays active and on topic. The Yoda keeps honesty from boiling over into disrespect by being courageous and calling out any inappropriate behaviors. At critical points during the meeting, the leader should turn to the Yoda and ask, "So, what's going on here that nobody's talking about?" This allows the Yoda to express the candor of the group and encourage risk-taking.

Formalise the water cooler

Have you ever been in a meeting, and just when it ends, everybody walks out and vents their frustrations next to the water cooler? Make the water cooler conversation the formal ending of the virtual meeting, instead. Five to 10 minutes before the meeting ends, do what everybody would've done after the physical meeting – but do it in the meeting and make sure it's transparent and conscious, processing people's real feelings. How?

Have everyone go around and say what they would've done differently in the meeting. This is like the final "Yoda" moment – it's the "speak now or forever hold your peace" moment. This is the time when you say what you disagreed with, what you're challenged with, what you're concerned about, what you didn't like, etc. All of the water-cooler-type conversation happens right now, or it never happens again. And if does happen later, you're violating the ethics of the team.

Keeping teams engaged

Working virtually gives teams back flexibility to work to how they're most productive – which does help with engagement. However, it also comes with its fair share of challenges.

Being geographically distant from each other means those in-person moments of 'micro communication' are often lost, and clarity of purpose and goal setting become even more important.

Some ways you can help keep virtual teams engaged:

Build and share your vision with the team
Make what you're doing as a team, on a project or with an individual piece of work crystal clear. What are you trying to achieve? How will you get there? What are the actions needed to achieve it?

Regular communication
In a virtual environment, you can't really overcommunicate as a leader. Agree with individuals how often and how they'd like to check in, whether that's daily messaging on your collaboration tool, an email update or a weekly video call. Find what works for each individual and their working style.

Share personal information (as appropriate)
All work and no play makes a virtual team a very sad place. We're social beings – so sharing news, celebrations and old holiday snaps keeps us connected and fosters engagement.

Have team members work on projects together
Don't stick to silos – allocate work where team members must communicate with each other as well as the team leader.

Schedule regular meetings (virtual or face-to-face) with interesting meeting formats
Informal catch up on the phone while you walk in the park? Video call in a quiet space to discuss objectives and feedback? Pick a format that's appropriate for your meeting content.

Being effective

Rules and goal setting in virtual teams

It's important in a virtual team to establish a common purpose or vision, while also framing the work you're attempting to undertake in relation to team members' individual needs and ambitions.

Here are a few tips on establishing the rules for a strong virtual team and setting individual goals within them.

Don't be afraid to set ground rules

Research shows that rules reduce uncertainty and enhance trust in social groups, thereby improving productivity. Agree on things like how quickly team members should respond to queries and requests from one another, and outline follow-up steps if someone is slow to act. Virtual teammates often find themselves saying, "I thought it was obvious that…" or "I didn't think I needed to spell that out." So also insist that requests be specific. Instead of saying "Circle back to me," state whether you want to give final input on a decision or simply be informed after the decision is made. If you have a conference call about project details, follow up with an e-mail to minimize misunderstandings.

Keep your head in the game

Put a stop to multi-tasking when you're on team calls. Come on, we've all done it. According to a recent study, 82% of people admit to doing other things – from surfing the web to using the bathroom – during team calls. But virtual collaboration requires that everyone be mentally present and engaged. Explain your policy, and when the group has a virtual meeting, regularly call on people to share their thoughts. Better yet, switch to video, which can essentially eliminate multitasking.

Agree and share goals with the team

Agree when you're all together what it means for the team to be achieving as a whole – how does your work together contribute to the purpose you outlined earlier? Once you've agreed team goals and objectives, take that down to individual level in separate conversations and outline what actions and metrics will contribute to that success. Then bring it back to group, whether that's in a meeting or via a virtual space. Everyone should be aware of the projects and actions others are involved in, avoiding areas of duplication and opening up avenues of collaboration.

Reach out

Encourage team members to share updates, successes and call outs for support on your collaboration tool. Reiterate that they're working as a team – where someone's struggling to source something or nail a certain goal, another member could have the exact piece of the puzzle they need.

Giving feedback virtually

Building trust and support

Most experiences with feedback in a work environment are annual performance reviews. These are usually top-down, one-sided conversations that rarely leave a huge impact on you once you leave the meeting room. Take that to the virtual space, where we're missing vital body language cues and potentially even eye contact, and it's a recipe for something less than success.

Feedback online certainly shouldn't be a once a year affair. To create meaningful feedback, you need to give it regularly – and also be prepared to receive it.

Fundamentals of feedback

1. Understanding effective feedback

The Situation-Behaviour-Impact model, developed by The Centre for Creative Leadership, is a great and simple structure you can use to help make your feedback more effective.
- Situation – define the where and when of the situation, putting things into specific context
- Behaviour – describe the specific behaviours you want to address
- Impact – use 'I' statements to describe how the other person's actions have affected you or others.

2. Knowing how to receive feedback is just as important as giving it

When someone gives us feedback on our behaviour, we can:
- Maintain the same behaviour (ignore the feedback)
- Reinforce the behaviour (deny or justify your behaviour)
- Change the behaviour (attempt to understand the feedback)

Many people's initial reaction towards feedback is to go into defense mode because we feel personally attacked. By trying to empathise with the person who feels uncomfortable with our actions though, we can gradually improve our relationships with others and with ourselves.

Don't be afraid of feedback

" *At the end of the day, we're all people – and people have feelings.* "

Being capable of opening up and allowing ourselves to be vulnerable with the people we spend most of our time with is probably one of the best things we can possibly do for ourselves – and it just happens to make teamwork more effective too.

3. When giving feedback, focus on how you felt about someone else's actions

The most important thing is to focus on the impact of someone else's actions, not the person. It's important to state the action and say how that action made you feel. For example, a team member might not answer any of the team inbox emails which are supposed to be shared around the whole team. Instead of saying, "You're selfish because you never chip in to answer emails" it would be better to say, "I've noticed you don't answer the team emails and I feel frustrated, because it increases the workload for the rest of the team."

This way of focusing on your feelings is a common technique used in conflict resolution. By doing so, you avoid making accusations that would make the other person feel less open to dialogue and prevent them from going on the defensive. Getting people to feel comfortable to communicate about how they feel is crucial, so anything that eases dialogue should be prioritised.

10 quick takeaways for leading virtual teams

If you could only take away 10 things from this guide, we want it to be these.

1 **Commit to regular calls or check ins.** Having a schedule of calls set up ahead of time means you both know when you will be in contact and can prepare in advance. This is precious time – nothing breaks trust like constantly cancelling meetings – so safeguard it in your diary and have a quiet space ready so you can be fully present.

2 **Be patient – trust takes time.** In a virtual environment it takes longer to build trust. Don't rush to get straight down to business – discuss the background to the project you are working on and take time to talk generally about what everyone is doing work-wise.

3 **Use a webcam.** Whenever possible use video conferencing apps like Facetime or Skype for meetings so that you can see each other's faces. This helps you to read each other's non-verbal cues and build trust through eye contact.

4 **Make time for small talk.** Just as you would with colleagues working in the same office, be sure to share personal insights and issues from your non-work lives when you are in virtual meetings. These conversations build trust by showing we care about each other and are a part of what makes us human.

5 **Keep the conversation flowing both ways.** Make sure your virtual meetings and calls are two-way and not just a brain-dumping or briefing session. Ask for feedback and ideas, and really listen to your colleague's views and opinions.

6 **Put yourself in their (distant) shoes.** If you are based in the office and your colleague works remotely, remember how much they miss out on which you take for granted. In the hub-bub of an office, you'll naturally hear and talk about things as you get coffee or walk past colleague's desks. Share as much information as you can with your remote colleagues and ask them if they need background before you launch into a complex conversation.

7 **Get clarity with active listening.** Remember that in virtual meetings it is even more important to check the assumptions you are making about what your colleague meant, said or did. Paraphrase information and ask questions starting with "Can I check that you mean….".

8 **Check-in emotionally.** Honest, open conversations are a pillar of trust. In a virtual meeting, make the time to check that you and your colleague are in tune with each other, and understand what each other is feeling and thinking.

9 **Write it all down.** Keep short notes of each virtual meeting so you can quickly pick up where you left off last time, check the progress you've made and stay accountable to each other. Of course, this is after you have covered off any personal topics!

10 **Reply to requests quickly.** If a remote colleague asks to talk with you, respond as soon as you can and positively, even if just with a time you are free to talk. Remember, they can't just walk into your office for a chat, so knowing they can reach you quickly when they need your advice or assistance is very important.

City&Guilds Group

The Oxford Group is one of the City & Guilds Group brands. Our shared purpose is to help people, organisations and economies develop their skills for growth. Together, our brands provide a broad and imaginative range of products and services that help people achieve their potential through work-based learning. From vocational qualifications, learning resources and assessments, through elearning and learning technologies, to training delivery and accreditation.

The Oxford Group
A City & Guilds Group Business