REMOTE TEAM GUIDELINES FOR SUCCESS

Hello, my name is Heather Smith, and I am the program director for the Master of Engineering in Engineering Management program at the University of Wisconsin Madison. Since our program is online, we've been able to continue our work with less challenges than other teams. However, we wanted to find a way to interact with you and give back to our community in a useful way as everyone begins adjusting to a new way to work with the Covid-19 restrictions. That had led to this first TechTalk from the Engineering Professional Development office at UW-Madison: remote team guidelines for success!

During this session, we'll discuss ways to ensure your team is set up for success when moving to a remote work scenario, such as the Covid-19 restrictions many of us are now facing. Please remember that some aspects of this situation are very unique; many of us will not have childcare or the other help we usually receive so that we can concentrate on our work. Be understanding and patient with each other. Everyone is concerned about success – use this move to remote work for your team as an opportunity to shine!

Working remotely, both as an individual contributor and as a manager, only works when two key factors are addressed: Trust and Respect. When circumstance is requiring the entire team to work remotely, this becomes even more important.

TRUST

The first key factor is Trust. You need to be able to trust that your teammates are completing their work. If you find yourself annoyed that your coworkers are having fun instead of working, then your team is not operating on trust. What matters is results; stop worrying about the minute-to-minute activity of your coworkers and instead focus on the results they are achieving. Are they meeting their goals? Do they submit their deliverables on time?

A big trust-killer is a manager that micro-manages. Many managers don't even realize they are perceived as micro-managers. Focusing on the output of a task, instead of the process to create the output, will help you avoid the trap of micro-managing and build confidence in your team that they have your trust.

RESPECT

The second key factor is Respect. When you are working remotely, especially during a crisis, your need-of-the-minute may not be a priority. This is no different than when you are in the office. Imagine this scenario: You need something from your co-worker. You check their calendar, and they are in a meeting with your boss in the conference room next door. Would you go into the conference room and interrupt the meeting to raise your need? No, you would never do that! That behavior is not acceptable in remote work either. It is crucial that you respect each other's time. To do so, everyone must set clear boundaries and have consistent processes for collaborating remotely.

TEAM METHODOLOGY FOR REMOTE WORK

A common methodology creates consistency and efficiency. Many people focus on selecting the right tool, imagining that the perfect tool will make everything better. However, the best tool is worthless if the processes to use it are not defined or followed. The process you use is far more important that the tools you use.

I'll set up some key processes for your team to follow; you'll just need to apply these processes to the tools your team uses. In our examples, I will use Microsoft Outlook and Microsoft Teams; you can replace with your tool of choice. Every tool has similar characteristics.

RULE #1: STANDARIZE!

Let's start with the tools you use. If your team uses three different tools for chatting with one another, then you will introduce inefficiencies as your team goes to each tool to check for chats, or to see if someone is available. As an example, in my normal workday, I may receive chat on my phone, WeChat, Teams, and Messenger. Using only one of those tools introduces significant efficiencies into my workday.

Your first step in preparing to work remotely as a team should be to agree on the remote work tools. This is not the time for your team to explore new tools. Continue to follow your organizations normal guidelines about what should be email, phone call, chat, or meeting; but add the restriction of a single tool for each function.

Ideally, you should agree to a single calendar tool, a single chat or collaboration tool, and a single tool for video conferences.

In today's example, I will focus on setting up a team that agreed to standardize on Microsoft Outlook for calendars, and Microsoft Teams for chatting, collaboration and video conferences.

RULE #2: SHARE YOUR CALENDAR ACCURATELY AND CONSISTENTLY

Many first timers to remote working find themselves working at all hours. It is important to follow your normal guidelines and set reasonable work hours. First, you don't want to burn out and neglect your personal life. Second, consistent work hour expectations are important for remote collaboration.

Keeping your calendar up to date will allow your team members to easily find time to collaborate with you. If you set the expectation that everyone's calendar will be up to date, then scheduling becomes much easier and seamless.

Good calendar management includes setting your working time, blocking your calendar on vacation and sick days, blocking time for personal items like exercise, lunch and doctor's appointments, and making sure your calendar is appropriately visible to your team.

Let's look at how you do each of these items in Outlook. Even if you do not use Outlook, watching this instruction will provide some help in your tool of choice.

> Insert video's here on how to, with a banner at beginning of each how to: 1) Block your vacation and sick days, 2) Set your working time, 3) Scheduling personal time blocks, 4) Calendar Privacy

RULE #3: INCLUDE DUE DATES IN ALL ACTION ITEMS

Remember how important trust is to working well as a remote team? At the beginning, I mentioned you should focus on deliverables, rather than the activities of your coworkers. Well, you can't focus on deliverables unless you set clear expectation of the due dates for your deliverables. This is basic project management: In our Technical Project Management course, we call this 'reliable promising'. Make sure you are being reliable for the tasks that you own. For the tasks that you are driving, you should agree on the deliverable expectations, including the due date. Once you have come to agreement, document that agreement.

An effective way to do so in the Microsoft platform is to use Planner to track the task, assigning to the correct person with a description and a due date. Then, you will also have a prompt for when to follow up. An alternative method is to send a calendar invitation for a short meeting to review the deliverable at the due date. Both options help you to remember to follow up at the correct time.

RULE #4: KEEP YOUR CHAT STATUS UP TO DATE

Most chatting software has a profile and a status option. Use the status option to let your coworkers know when you are available; this is similar to leaving your office door open so people can stop by.

Set your status to 'available' when you can stop what you are working on to chat. Set your status to 'busy' when you are working but will not immediately respond to chats. Use 'away' to signify that you are away from your computer and you won't reply immediately. One of my favorite status options is 'Do Not Disturb'. This works a little differently in different applications. It can

either block incoming chats altogether, or it queues them up so that you do not receive them until you are out of this status. This is a great way to keep your focus on your current task.

Ideally, try to set a decent amount of time every day for available time. When we are all working remotely, it is important to build in time for relationship building and feeling a little less alone.

RULE #5: MAKE MEETINGS VIDEO CHATS WHENEVER POSSIBLE

Feeling isolated and disconnected is definitely a concern when everyone is being asked to work remotely. Video conferences are one small step we can take to reduce the isolation. If you search the internet, you will find arguments for and against video conference, and there are some valid reasons on both sides. I have found the benefits of video conferencing to far outweigh the negatives.

A video conference over a voice call increases the connection between the team and improves meeting takeaway quality. I've found a good team enjoyment of the coworker's cat that keeps walking in front of the camera to be a good meeting icebreaker as well!

Be sure your meetings always have a way to switch to audio in case of bandwidth issues. The value of video quickly decreases when the video is constantly hanging up or dropping altogether.

RULE #6: DRESS AS THOUGH YOU ARE GOING INTO THE OFFICE

Have you ever heard the adage about smiling while you are on the phone because it makes you sound friendlier? I can attest that when you dress as you normally would for work, you behave differently than when you dress casually. I found when I am speaking in a video conference and dressed casually, I use the language I would use with friends, rather than professional language. I don't even realize I am doing it…the way I am dressed makes that big a difference in how I behave. Therefore, I suggest that even though you are working from home, you should keep to your normal routine, including dressing for the office.

If you need to have calls with customers, this can be even more important! I have been on a video call for an interview with a potential employee dialing in from their home who was dressed in a button up shirt and jacket; he looked great! Partway through the video interview, he had to stand up to grab a pencil, allowing me to enjoy the athletic shorts he had paired with his button-down shirt. Don't assume you only need to dress up the part that the camera sees; you stand up in video meetings more often than you think!

RULE #7: DON'T MULTITASK DURING MEETING

Whether you are on a video call or a phone call, it is obvious to other when you are not paying attention. Video calls really highlight the issue – you can see the eyes darting away to the other task. Consider how you would feel if you called a critical meeting and the attendees were obviously not paying attention. So, don't multitask during your meetings - get the most out of the meeting time by participating fully.

If you think the meeting is a waste of time, address that a different way. If the meeting facilitator hasn't already done so, request a meeting agenda. If the agenda doesn't apply to you, reach out to the meeting facilitator and respectfully discuss the need for your attendance.

CALL TO ACTION

I am sure this is not an exhaustive list! However, I have been working remotely for quite some time, and I have managed remote workers, giving me success and failures. I hope to pass some of my lessons learned on to you, saving you the same failures.

This is a great time to help your colleagues as well. If you have any tips to share or challenging lessons learned in remote work, please share them in the comments.

If you found this session valuable, stay tuned! We have more Tech Talks coming your way on a variety of topics. The speakers for these Tech Talks are professors, lecturers and program directors in the online Master of Engineering degree programs at the University of Wisconsin – Madison. We have 8 online degree programs are online, intended for working professionals and designed to work with your life. Our differentiator is our world class faculty and instructors and our engaged model for adult learners.   You can learn more about our degree programs at epd.wisc.edu.