

Managing Remote Employees



Manager Guide

A Framework for Member Conversations

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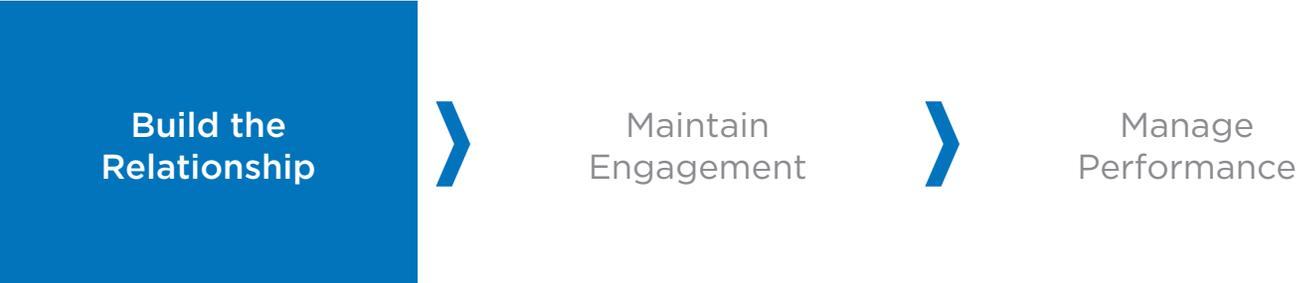
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OVERVIEW

Mandate	Why This Is Hard	What You Should Do
Build the Relationship	Remote employees and managers find it hard to align expectations of roles, responsibilities, goals, and workflows.	<ul style="list-style-type: none"> ▪ Set clear expectations (pages 6-7). ▪ Understand the employee’s expectations (page 8). ▪ Overcome cultural and geographic barriers (page 9)
Maintain Engagement	A lack of visibility causes managers to struggle to identify performance and engagement issues early on.	<ul style="list-style-type: none"> ▪ Maintain visibility into team and individual workflows (page 11). ▪ Connect remote employees to the rest of the team (page 12). ▪ Use multiple channels to maintain constant communication (page 13).
Manage Performance	Managers have limited visibility into remote employees’ work processes.	<ul style="list-style-type: none"> ▪ Evaluate performance based on outcomes, not processes (page 15). ▪ Develop employees through effective remote coaching (page 16).

ROADMAP



Managers of remote employees must assess workloads, progress, and performance through non-visual cues.

BUILD THE RELATIONSHIP

Challenge

Remote employees and managers find it hard to align expectations of roles, responsibilities, goals, and workflows.

“My direct report says that he understands his role and responsibilities, but I’m not sure to what extent that’s actually true. I wonder if he’s just afraid to admit he doesn’t understand.”

Manager

“I never get a chance to clarify my broader role and responsibilities with my manager because we speak infrequently, and when we do speak, our discussions are focused on the specifics of the projects I am working on currently.”

Remote Employee

Solutions

1

Set Clear Expectations

2

Understand the Employee’s Expectations

3

Overcome Cultural and Geographic Barriers

Source: CEB analysis.

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

Set clear expectations and goals at the beginning of the relationship, as opportunities for interaction are limited.

- Clearly communicate the individual's role and responsibilities.
- Establish where the employee fits into the team.
- Acknowledge issues that the employee may encounter when working remotely.

1. SET CLEAR EXPECTATIONS

Provide Information Regarding Individual Responsibilities and Team Attributes at the Beginning of the Remote Management Relationship

Individual's Role and Responsibilities

- Highlight the individual's day-to-day responsibilities
- Clearly communicate to the employee that you expect him or her to proactively address any issues that may arise.
- Clarify how the individual's role and responsibilities affect the organization's objectives.
- Identify what technology the employee will need access to and ensure that it is working properly.

Source: CEB analysis.

Team Attributes

- Clearly define team members' roles and responsibilities and how they fit with one another.
- Establish your preferred methods of communication (see page 13 for more information).
- Describe your management style.
- Establish protocol for tracking when employees are on vacation, and make it accessible to all team members.

Discuss Challenges That May Arise

Common Challenges of Remote Working Relationships

- Technology malfunctions or incompatibilities
- Ambiguity of work practices and norms
- Tendency to make assumptions or misinterpret communications
- Misaligned team visions
- Feelings of isolation or exclusion from the team

Source: CEB analysis.

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

Establish well-defined and measurable performance expectations.

- At the beginning of the relationship, clarify the individual's objectives and how they connect to the team's and organization's objectives.
- Communicate expected outcomes using the SMART framework to ensure the remote employee understands performance expectations.

1. SET CLEAR EXPECTATIONS (CONTINUED)

Clarify Role and Performance Expectations at the Beginning of the Remote Management Relationship

Effectively Define Performance Expectations

- Set key metrics on which you will measure the employee.
- Provide clear guidelines regarding work quality.
- Determine frequency of one-on-one and team meetings.
- Discuss when and how you will provide informal and formal feedback.
- Link responsibilities to the team's mission and values.

Source: CEB analysis.

Ensure Clear Objectives Using the SMART Framework

Use the SMART framework to ensure that clear objectives are established. You should be able to answer "yes" to the following questions for each objective:

1. Is it simple?
2. Is it measurable?
3. Is it actionable?
4. Is it results-oriented?
5. Is it time-based?

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

The lack of face-to-face interaction makes it difficult for managers to understand remote employees' aspirations and frustrations.

- Managers must maintain open lines of communication and directly ask employees about what motivates and challenges them.
- Managers must also discuss the logistics of making a remote working relationship effective.

2. UNDERSTAND THE EMPLOYEE'S EXPECTATIONS

Questions to Ask Your Direct Report at the Beginning of a Remote Management Relationship

- What are your short- and long-term career aspirations?
- What do you think are your greatest strengths?
- What do you think are your greatest development areas?
- What are your expectations of me as your manager?
- What do you see as the benefits of working remotely?
- What concerns you about working remotely?
- In what instances do you prefer which method(s) of communication?
- What will your working hours be?
- What is your time zone and what is the best way to make it work with other team members' time zones?
- What additional information would help me get to know you?

Source: CEB analysis.

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

Maintain an inclusive team environment and be accommodating to employees who sit in different time zones.

- Clarify key words, ambiguous areas, and potentially controversial issues to prevent misunderstandings.
- Allow team members' cultures to blend so that the team creates an identity that embraces all cultures, rather than forcing the culture of the organization's headquarters on the team.
- Be sensitive to employees working in different time zones.

3. OVERCOME CULTURAL AND GEOGRAPHIC BARRIERS

Communication

- Avoid using slang or colloquial language, which some team members may not understand.
- Be straightforward in your communication; things such as sarcasm may not be interpreted correctly when not delivered in person.
- Speak slowly and be sure to enunciate with employees whose first language is not the same as yours.

Cultural Norms

- Understand each culture's work-life balance norms.
- Determine the business communication and etiquette norms for each country and share this information with across the team.
- Identify if employees' views of authority differ in their home countries so that you can adjust your management style appropriately.

Working Hours

- Become aware of any national holidays for which employees in other countries should be off from work.
- Be aware of time zones.
- Use a conference line for meetings and allow employees to dial-in from home if the call is very early or late in his/her time zone.
- Alternate which employees have to work outside of normal working hours when holding team meetings.
- If employees come in early to accommodate another time zone, encourage them to leave early that day (and vice versa).

Source: CEB analysis.

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

Managers' decreased line of sight to remote employees makes it more difficult to monitor engagement levels.

MAINTAIN ENGAGEMENT

Challenge

A lack of visibility causes managers to struggle to identify performance and engagement issues early on.

"I have little sense of how my remote employees are getting on with their work. It's hard to tell how busy they are, if they need more help, and whether or not they are enjoying their work."

Manager

"I feel left out of a lot of conversations and decisions. It's as if my manager and team forget about me."

Remote Employee

Solutions

1 Maintain Visibility into Team and Individual Workflows

2 Connect Remote Employees to the Rest of the Team

3 Use Multiple Channels to Maintain Constant Communication

Source: CEB analysis.

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

Managers must make a conscious effort to maintain visibility into workflows and processes.

- Online shared work spaces are a good medium through which to promote collaboration.
- Constant formal and informal communication allows managers to track employees' work progress engagement levels.
- Remote employees do not have the same visibility into what is going on within the team and organization as on-site employees do, so managers must keep remote employees stay informed.

1. MAINTAIN VISIBILITY INTO TEAM AND INDIVIDUAL WORKFLOWS

Create Shared Online Work Spaces

- Use project planning tools to maintain visibility into the work capacity of all team members.
- Operate a shared calendar so that employees know what each team member is working on and what the deadlines are.

Maintain Constant Contact

- Schedule regular meetings to assess progress and identify issues.
- Make a conscious effort to communicate informally with employees on a regular basis.

Act as the Employee's Link to the Organization

- Make a concerted effort to keep remote employees informed of what is going on in the office and the organization.
- If messages are being spread informally through the organization, make sure to include remote employees on those communications.

Source: CEB analysis.

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

Managers and employees must make a deliberate effort to get to know one another when working in multiple locations.

- Remote workers may feel isolated from the team, so managers must make a deliberate effort to foster a sense of inclusion.
- Humanize team members by increasing familiarity and building relationships with one another.
- During remote meetings, make a deliberate effort to ensure that remote employees are able to contribute.

2. CONNECT REMOTE EMPLOYEES TO THE REST OF THE TEAM

Foster a Sense of Team

- Include remote workers in all on-site activities (e.g., if on-site employees are taken out for coffee, send a gift card to the remote worker for a cup of coffee).
- Highlight individuals to the rest of the team when they reach critical milestones.
- Create a team “bulletin board” on the intranet to celebrate team accomplishments.
- Announce awards during team videoconferences.
- Post pictures of remote employees in the office and send remote employees pictures of in-house employees.

Encourage Employees to Build Personal and Professional Relationships with Each Other

- Broker live networking opportunities for remote employees by creating peer groups in each geographic location.
- Dedicate a few minutes at the beginning or end of meetings for informal conversations, during which administrative topics are not allowed.
- Encourage employees to share information about their non-work-related interests and hobbies.
- If team members are from different countries, encourage them to share information about their cultures with the team.

Ensure Inclusion During Team Meetings

- Ensure that everyone can hear everyone else during team meetings conducted via the phone or videoconference and keep background noise to a minimum (e.g., shuffling papers, side comments).
- Check with remote employees regularly during phone meetings or videoconferences to see if they have something to add or ask. It is often harder for them to contribute to the conversation when others cannot see their non-verbal communication.

Source: CEB analysis.

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

Use multiple methods to communicate clearly with all team members, promote transparency, and foster a sense of inclusion.

- The nature of the topic should dictate the communication method managers and employees use.

3. USE MULTIPLE CHANNELS TO MAINTAIN CONSTANT COMMUNICATION

Communication Method	Sample Situations
Shared Online Database	<ul style="list-style-type: none"> ▪ Collaborative work ▪ Discussion threads ▪ Idea sharing
E-Mail	<ul style="list-style-type: none"> ▪ Daily/weekly progress updates ▪ Non-urgent questions ▪ Individual or team accomplishment highlights
Instant Messaging	<ul style="list-style-type: none"> ▪ Urgent questions ▪ Informal discussions ▪ Real-time information sharing
Telephone	<ul style="list-style-type: none"> ▪ All sensitive issues ▪ Any situation where the tone could be misconstrued when put into written form ▪ Real-time information sharing (e.g., brainstorming, decision making) ▪ Urgent issues ▪ Formal discussions regarding progress on projects, development needs, and recent successes
Videoconferencing	<ul style="list-style-type: none"> ▪ Delivery of difficult messages (when in-person meetings are not an option) ▪ Formal discussions regarding progress on projects, development needs, and recent successes ▪ Monitoring team morale ▪ Team meetings
In-Person	<ul style="list-style-type: none"> ▪ Initial team meeting, if possible ▪ Recurring team meetings for team building, if possible

Source: CEB analysis.



A large part of communication is body language and facial expressions. Managers must be aware of how what they say will come across in the absence of visual cues.

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

Managers struggle to understand remote employees' workflows given that they cannot directly observe their day-to-day activities.

MANAGE PERFORMANCE

Challenge

Managers have limited visibility into remote employees' work processes.

"I get nervous that projects are not going well or that they will not be done on time since I often don't see anything until the final result. This means that I don't have the opportunity to intervene if the project is going in the wrong direction."

Manager

"I love the freedom working remotely offers me, but I feel like I miss out on the informal opportunities to demonstrate my interests and capabilities. Since my performance is really only judged through a few, formal interactions, I often don't like to share anything until it is fully completed."

Remote Employee

Solutions

1

Evaluate Performance Based on Outcomes, Not Processes

2

Develop Employees Through Effective Remote Coaching

Source: CEB analysis.

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

Managers must evaluate remote workers through end results only.

- Clearly lay out expectations for what outputs are “critical” and what outcomes are “nice to have.”
- Managers of remote workers should use multiple sources of information when evaluating remote employees.

1. EVALUATE PERFORMANCE BASED ON OUTCOMES, NOT PROCESSES

Establish Well-Defined Performance Metrics

- Product quality
- Schedule adherence
- Specification adherence
- Error rates
- Customer (internal and/or external) satisfaction
- Group and individual behavior demonstration (e.g., collaboration, innovation, time management)
- Group and personal development demonstration (e.g., ability to meet professional certifications, increase in terrain knowledge)

Obtain Feedback on Employees’ Performance from Multiple Sources

- Gather feedback from employees’ peers and direct reports (when applicable) when evaluating remote employees, as it is particularly important for this employee population, given that managers have fewer opportunities to observe them directly.
- In addition, obtain feedback from external customers and internal stakeholders, when possible.
- Brainstorm and problem-solve with remote employees to gain a better understanding of their current capabilities and knowledge.

Source: CEB analysis.

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

Managers must make a conscious effort to maintain visibility into workflows and processes.

- Online shared work spaces are a good medium through which to promote collaboration.
- Constant formal and informal communication allows managers to track employees' work progress engagement levels.
- Remote employees do not have the same visibility into what is going on within the team and organization as on-site employees do—managers must ensure that remote employees stay informed.

2. DEVELOP EMPLOYEES THROUGH EFFECTIVE REMOTE COACHING

Priority Activities for Coaching from a Distance

- 1. Set Communication Protocols to Avoid Misunderstandings and Miscommunication**—Establish the time, day, and length of each coaching session, and who should contact whom. Maintain a consistent schedule.
- 2. Prepare Early for Each Call**—Prior to sessions, review the projects the employee is working on currently, previous coaching records (see number 7 below), and prioritized development areas. Prepare questions from this information. Send the employee an agenda prior to the meeting and ask if he or she would like to add anything to it.
- 3. Customize Interaction Technique**—Calibrate your coaching approach to the individual's learning style. Build intimacy by showing mutual respect, defining key words to avoid misunderstandings, encouraging openness, and providing honest feedback. Choose an appropriate communication medium based on the main goals of the specific session to make conversations more engaging (see page 13).
- 4. Offer Undivided Attention**—When coaching over the phone, do not do other things at the same time. Remove all distractions and treat the conversations as seriously as you would a face-to-face meeting.
- 5. Build the Relationship**—Promote a personal relationship by encouraging casual conversation at the beginning and/or end of each call.
- 6. Maintain Awareness of Morale**—Ask direct questions to gauge the employee's engagement level (e.g., How do you feel about your current workload? What do you need from me to make things easier?). Provide feedback and insights in a positive tone and highlight the employee's accomplishments to improve morale.
- 7. Document Coaching**—Provide the employee with substantive materials to focus remote conversations. Maintain a record of coaching progress by keeping all documentation (e.g., call agendas, post-call summaries), which should be used to inform future coaching sessions

Source: CEB analysis.

BUILD THE RELATIONSHIP

MAINTAIN ENGAGEMENT

MANAGE PERFORMANCE

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