the remote employee

HANDBOOK

how to take charge and be effective

Your ability to take ownership of your success and engagement in your role is critical in this new business environment. In the language of Situational Leadership®:

There is no better time than **NOW** to **"TAKE CHARGE"** of your performance.

ABOUT THIS HANDBOOK

As organizations across the globe quickly shift to remote work structures, employees that were accustomed to working in a centralized location are finding themselves in a new world of work—in their home. The usual business routines, processes and collaborative practices that work in a centralized setting need to be adjusted or revamped entirely to support a distributed workforce.

There is an infinite amount of valuable information available about how to transition to remote work successfully and depending on your role, the impact of these changes will be different. The reality is that the fundamental needs for successful and engaged employees have not changed: clarity, communication and consistency are always going to be essential, remote or not. In fact, they are even more important now when distance presents barriers to the frequent personal interactions to which we have become accustomed.

This handbook is designed to help every employee navigate this evolving world of work with a new lens. Whether you are new to remote work or a veteran, the strategies will help you demonstrate the intentional behavior change and specific skills required to achieve clarity, effectively communicate and practice consistency—*differently*—in a remote environment.

Your ability to take ownership of your success and engagement in your role is critical in this new business environment. In the language of Situational Leadership®: There is no better time than now to "Take Charge" of your performance.

3

CLARITY

When working in a shared office space, team members are more readily accessible to provide direction, make decisions, problem-solve or answer questions. There is an innate rhythm to the productive communication that happens on-site or in the moment. When working remotely, those opportunities to catch a colleague or your manager in the hall are not options, so it's important to be intentional and proactive about gaining clarity when you need it.

Gain clarity with your manager by transparently sharing an assessment of your performance needs.

Use the Taking Charge Process:
Step 1: Identify the specific task.
Step 2: Assess and describe my current Performance
        Readiness®.
Step 3: Communicate my performance needs.
Step 4: Manage my movement.

☐ **Ensure alignment with your manager** and team about your short- and long-term priorities: what you are working on, when deliverables are due and exactly what is expected of you by when.

☐ **If you are assigned an action item during a meeting that you are unclear about, ask for the specific information you need** before leaving the call or as soon as possible after the call. Don't let the independent nature of remote work lead to trying to figure it out on your own.

☐ **Decisions need to be made based on the most current, relevant information.** Leverage your collaborative technology and project management tools to share files and updates during meetings to literally ensure everyone is on the same page.

☐ **Context matters.** If you are joining a project and need to understand the big picture, ask for the background information or rationale you need to gain alignment on the "why." Assumptions are subjective and can cause confusion about roles and expectations.

☐ **Your connection to the organization is a key driver of positive engagement.** Seek to understand how your role and actions contribute to the team and organizational goals.

CLARITY

☐ **Ensure that you and your manager have a shared understanding of what success looks like** for any given task. Confirm alignment by sharing the "task back" with your manager to articulate your understanding of the expectations.

> **THINGS YOU CAN SAY:**
> ☐ "So, here is what I heard …"
> ☐ "To confirm, I need to _____ by _____. Is that correct?"

☐ **Get comfortable assessing your own ability** to successfully perform a task accurately in your remote situation. Do you have the knowledge, experience and skill to perform the task successfully? If not, it's time for you to identify what you need to be successful. Do you need:

- Training?
- Technology-related support?
- Supervision and step-by-step instructions?
- Practice and feedback?

☐ **Get comfortable assessing your own willingness** to perform a task accurately in your remote situation. Are you confident, committed and motivated? If not, explore why you are unwilling or insecure and discuss it with your manager?

COMMUNICATION

Shared workplace interactions tend to happen more spontaneously and as needed, and that same level of agility needs to be practiced in remote work. Be flexible and responsive and use your collaborative communication tools to stay actively engaged, productive and accessible.

Consider the following questions:

- How do you currently communicate your performance needs for specific tasks to your manager?
- Upon reflecting, are there areas where you can improve immediately?
- Share those with your manager to achieve same-page status!

COMMUNICATION

☐ **Your manager and team members are not mind readers**, and they are not in the room or building. Don't assume others are aware of your needs or progress on a project. Reach out and overcommunicate your needs and status updates.

☐ **When it comes to your performance and engagement, less personal interaction with your manager may make it difficult for them to gauge how they can support you.** It's critical that you take the initiative to proactively communicate your performance needs to your manager. If you find that you need direction or support to be successful, ask for it.

> **THINGS YOU CAN SAY:**
> ☐ "I've never done this before and I'm not sure where to start ..."
> ☐ "I'm excited to work on this but I have a few questions before I get started ..."
> ☐ "Can we talk through a few ideas I have?"
> ☐ "I'm having a difficult time with .... Can I show you where I'm getting stuck?"

☐ **Building rapport, trust and productive relationships with remote workers requires an intentional commitment** to establishing genuine connections. Set time aside during scheduled meetings to talk on a personal level and schedule virtual "catch-up" calls.

☐ **Choose the communication channel that is optimal for the situation or message** (which may not always be the most convenient for you). For example, if the purpose of your communication is to kick off a team project, a video teleconference will be more effective than sending emails back and forth. Sending a detailed question in a chat might be quicker for you but, out of context, don't assume that your coworker will be able to provide an accurate response in the moment.

☐ **Leverage technology to personalize your communications** instead of relying on email. In addition to direct phone conversations, use richer, real-time media and video conferencing tools with webcams and chats.

> See **Leveraging Your Technology** for more tips on communicating in a virtual meeting.

☐ **Be proactive about contacting others.** Instead of waiting for others to reach out to you for project updates, make it regular practice to contact them first.

☐ **Keep communication brief** with the appropriate amount of context, rationale and clear direction.

☐ **Be transparent about your availability** by sharing your calendar and overcommunicate your status.

COMMUNICATION

☐ **Recognize that people have preferences for communication.**
For some, social interaction is a source of energy so be receptive
to unplanned calls that build connections. But others may prefer
to schedule time in advance or communicate via quick chats or
texts. Find out their preferences and make the effort to align with
their needs.

PRO TIP: COMMUNICATION ETIQUETTE

Become familiar with the etiquette associated with each mode of
communication you use. Practicing commonly accepted etiquette
will enhance the effectiveness of your message. Although this list is
not complete, a few examples of etiquette associated with various
communication technology are listed below:

☞ **Email:**
- Clearly define the intent of the message in the subject line
- Use urgent and priority flags sparingly
- Avoid sarcasm. It is often difficult to distinguish sarcastic
  responses from normal responses without access to voice
  intonation and nonverbal expressions
- Do not type in all caps because it implies shouting
- Do not reply to all recipients unless it is necessary for all to
  see your response

☞ **Voicemail:**

- Include important information in your greeting. If you split your time between multiple locations, your greeting should direct callers to the number where you can be reached

- Keep your messages brief. If you cannot finish your message in 30 to 45 seconds, send an email

☞ **Teleconference, videoconference, and online conference:**

- Call in a few minutes in advance. Give yourself some time in case you have trouble signing on or connecting to the conference. Linking into a meeting after it has started can be very distracting to those already in the conference

- Say your name each time you speak if you are part of a large, interactive teleconference

CONSISTENCY

Stay accountable to own your performance by establishing routines and communication practices that will support your productivity and engagement as a remote worker.

Situational Leadership® emphasizes that:

"The most inconsistent thing you can do is treat everyone the same." - Dr. Paul Hersey

It's important to own your performance and tell your manager at what level you are, so that you two can consistently match performance needs with the proper leadership style.

☐ **Pay attention to the signs of regression.** Change is difficult and adjusting to new tools and practices can be stressful. If you are overwhelmed, frustrated or need help managing your priorities, ask for coaching.

☐ **Remote work can be isolating** to some people who are energized by social interaction. If you are struggling or feeling disengaged, talk to your manager about solutions.

☐ **If you used to commute to work, you gained extra time in your day,** so use it to your advantage. Use that commute time to invest in your personal development daily. Review blogs, curate resources or explore the various options for short, online learning to develop a specific skill. Even 15 minutes a day can make a difference.

☐ **Commit to proactively engage in frequent communications** with your manager and team members. Schedule time on your calendar to ensure opportunities for connection are on the books.

☐ **Plan for productivity.** Schedule time on your calendar for periods of uninterrupted work when you need to focus on a specific task. Close your email, disable notifications and change your status to "Do Not Disturb" to minimize distractions.

☐ **Plan for the breaks you will need** in your day. Just like in the office, you will need mental and physical breaks where you can walk around, snack, etc. Don't plan a day where you sit in front of your screen all day and go from one virtual meeting to the next. Recognize when you need to recharge and go for a walk, meditate or do whatever energizes you to stay productive.

CONSISTENCY

☐ **When you work from home, others may assume that your flexible arrangement means an open-door policy** for visits and phone calls. Establish guidelines for your family that define a justifiable or urgent interruption.

☐ **Create a signal that family members can use to communicate** that their reason for interrupting you meets your shared definition of "necessary" or "urgent." Pick a subtle signal to prevent potential embarrassment during conference calls.

☐ **Create a signal that you can use to tell family that you should not be interrupted** unless it is urgent. This can be as simple as a sign on your home office door.

☐ **Avoid answering your home phone, checking your personal email or answering your home doorbell** (unless you are expecting a work-related visitor or delivery).

☐ **Set up your workspace** to support your daily routine. Everything should be accessible in one place. Using webcams will become the default expectation, so be prepared to be presentable on camera.

PRO TIP: BOUNDARIES

Set boundaries and stay consistent. Teach others that remote work is real.

☞ Never make light of the nature of remote work. Joking about wearing your robe and watching soap operas while on the clock will only encourage a lack of respect for telework.

☞ Answer your phone with your name and/or company name.

☞ Set regular work hours. Share these hours with your family, friends and neighbors.

☞ Always refer to your workplace as your office, even if it is within your home.

☞ If family or friends call or stop by in person during work hours, tell them that you are in the middle of working on something important and that you'll have to get back to them at the end of the business day.

LEVERAGING YOUR TECHNOLOGY

An organization's collective success is driven by the success and engagement of every employee, from the individual contributor to the senior leadership level. As you learn how to apply these new skills, take ownership of your own performance and adapt to the new world of work, be patient with yourself and others—we are all in this together.

"Adapt" is one of the core competencies of Situational Leadership®. During times of change and disruption, it's important to be flexible and to adapt to the current circumstances.

Whether you are a veteran or novice in working remotely and leveraging technology, follow these tips in order to adjust smoothly.

☐ **It is important that everyone on the team knows how to use the technology and meeting platform** that will be utilized for remote work. Make sure that you take advantage of the online, self-directed training that is available for things like Microsoft Teams, GoToMeeting, etc. Encourage others on the team to do the same and, if necessary, ask your boss to help arrange for hands-on training for your entire team so that everyone becomes comfortable and facile with the tech.

☐ **If you are unfamiliar with some of the meeting technology or Microsoft Teams platform, consider doing a practice run with a few close colleagues.** This will give you an opportunity to get comfortable with everything.

☐ **Use your webcams for almost every meeting** and encourage your team members to do the same.

PRO TIP: WEBCAM BEST PRACTICES

☞ Make sure you have enough light and that the light source is in front and above eye level.

☞ Movements front to back/side to side are exaggerated.

☞ Rapid body movements blur so avoid moving quickly in front of the camera.

☞ Try to position your webcam so that it is at your eye level (that way your face will appear in a more natural perspective).

☞ Plan on logging on in advance of the meeting so that you are "up and running" on the platform, and things are working at your end.

PRO TIP: LEADING A VIRTUAL MEETING

☞ If needed, suggest participants not familiar with the tools arrive early to a meeting for a demonstration.

☞ Use a welcome slide to let people know they are in the right place.

☞ Let people know ahead of time that they will be on camera.

☞ Know what attendees are seeing. You may want to consider the use of two monitors so that you can see what they are seeing.

☞ Try to make direct eye contact with the webcam just like you would in a room.

☞ Use USB headsets whenever possible (instead of speakers or computer microphone).

PRO TIP: ATTENDING A VIRTUAL MEETING

Virtual meetings are quite different from face-to-face meetings. They require more active participation and attention from your end as a participant:

☞ Do not multitask—period. Yes, it is tempting to do so, but please consider what that would look like if you did that during a face-to-face meeting. Virtual meetings should be no different.

☞ Use your webcam and encourage your teammates to do the same.

☞ Actively participate and encourage others to do the same. Webcams can help to increase participation, but if they are not being used, everyone has the responsibility to make the meeting productive and meaningful.

☞ Make sure you are in a quiet setting and one that is conducive to participating in a business meeting.

☞ Pay extra attention to your listening skills. If you're not using webcams, you will need to listen extra carefully since you can't see any other physical cues from people such as frustration, confusion, etc.

☞ Encourage your team and work colleagues to make use of the various meeting tools that may be part of the platform you are using. For example, just like you might use a whiteboard to capture ideas or brainstorm in a physical meeting room, use the whiteboard capability of the virtual meeting platform the same way.

☞ If you are leading a discussion, try to get everyone involved and speaking. This can be hard to do if you can't see everyone in real time.

☞ More than anything, be very purposeful in the way you participate in the virtual meeting. Identify yourself before you talk ("This is Rob."). Speak clearly and perhaps more slowly than you normally would. Ask questions if something isn't clear or you're not sure you understand what the person means who is speaking. These all seem like obvious things you would do in a face-to-face meeting, but they are even more important when your meeting is virtual in nature.

WANT TO LEARN MORE?

Situational Leadership®: Taking Charge helps front-line employees and individual contributors see themselves as part of the leadership process. They become accountable for achieving results through the use of the same performance language and model used by their leaders.

If you would like additional information on how to "Take Charge" of your performance and development and build accountability in the workplace, visit **situational.com.**