



the remote manager

# HANDBOOK


how to manage others and maintain engagement



## 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 homes. Entire teams, departments and businesses accustomed to communicating and collaborating in an in-office setting are faced with the need to adjust their work processes or revamp them entirely to support a distributed workforce.

Much of the responsibility for ensuring continued success from this new remote workforce falls on the shoulders of managers. In many cases, these managers are also unfamiliar with the challenges of working remotely in addition to those of leading an off-site team. There is an endless list of resources to assist managers in this transition, and the sheer volume of information may be overwhelming. That is why it is more important now than ever to remember that, although the specific leadership challenges one faces are always changing, the fundamentals of effective leadership will remain the same. To ensure success and engagement within their team and the organization as a whole, managers



must focus on their employees' core needs: clarity, communication and consistency. Maintenance of these needs is familiar to all managers but the format of distance working presents unique challenges.

This handbook is designed to help every manager navigate this evolving business landscape through 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 throughout your entire team in a remote environment.

Your ability to manage others and maintain engagement in this new business environment is critical. Situational Leadership® provides the framework necessary for any leader to maximize their management skills under even the most unpredictable circumstances. Effectively influencing others and driving behavior change is essential for rapid adjustment at a time when responsive leadership is more critical than ever.

# CLARITY

When managing a team in a shared office space, team members are readily available for spontaneous check-ins, in-person directions for tasks, coaching discussions and problem-solving. However, in a remote setting, these interactions must be performed deliberately. It is far easier for an employee to slip between the communication cracks and not receive the support they need for a task. Employees may even regress in their performance on tasks they would complete successfully under normal circumstances. It's your responsibility as a manager to be proactive in providing your team with all the information and support they need to be successful and avoid regression.

**Managers create clarity for employees by accurately matching their leadership style to the needs of others. This begins with a proper diagnosis:**

- **Ensure you have a clear understanding of the task you are attempting to influence**
- **Assess the current Performance Readiness® of the individual to complete the specific task**

- ❑ **Ensure alignment with individual team members** around short- and long-term priorities: what they should be working on, when deliverables are due and exactly what is expected of them by when.
- ❑ **Keep your team informed of your tasks and projects as well.** Your team looks to you for guidance, and it is important to demonstrate the same communication standards you expect from them.
- ❑ **Ask individuals to confirm that they've received enough clarity on specific tasks.** During remote meetings, it can be easy to interpret silence as understanding or agreement, but when the pressure of the individual nature of remote work may cause an employee to feel they should figure it out on their own rather than ask questions, as the manager, you need to be proactive in ensuring understanding.
- ❑ **Keep your team up to date with the most current, relevant information** to enable them to make sound decisions. Leverage your collaborative platforms and project management tools to share files and updates during meetings to ensure everyone is working with the same information.
- ❑ **Provide your team with relevant context.** As a manager, you may be your team's only window into the larger picture, especially when working remotely. It's important to provide clarity to them as to what the organization's goals are and how their projects align with that.

## CLARITY

- ❑ **Ensure each individual team member feels connected to the organization.** Every employee is different and some may need more attention on this front than others. Maintaining employees' connection to the organization's goals and providing understanding about how their role contributes to those goals is essential to nurturing engagement.
- ❑ **Ensure that you and your team members have a shared understanding of what success looks like** for any given task. Confirm alignment by encouraging employees to share their understanding of the task and expectations with you after assignment.
- ❑ **Foster an environment of honesty and vulnerability.** When working remotely, you will often need to rely on your employees' assessments of their own ability and willingness to perform a task successfully. They need to be comfortable sharing their honest assessment with you, even if it's not the response they think you want to hear. Building this trust will require you to be honest and vulnerable with your employees in return. Share your honest feelings and concerns when facing these new challenges without indulging in unproductive complaining.

- **Demonstrate that honest personal assessment of ability is appreciated** through positive feedback and working with individuals to fill any knowledge or experience gaps needed to perform a task successfully. Be prepared to ask clarifying questions to figure out what exactly is holding them back. Do they need:
  - Training?
  - Technology-related support?
  - Supervision and step-by-step instructions?
  - Practice and feedback?
  
- **Demonstrate that honest personal assessment of willingness is appreciated** through positive feedback and working with individuals to find out why they are lacking confidence, commitment or motivation. This may be a difficult conversation for employees to open up about, so be patient and empathetic before immediately moving onto a solution.



# COMMUNICATION

Interactions in a shared workplace tend to happen naturally, and it is easy to check in on employees as needed. Maintaining this level of agility in communication with a remote workforce is difficult, but necessary. It is all too easy for employees to feel disconnected from their leadership without these passing interactions. To combat the inherent disadvantages of communication while working remotely, you need to be flexible, engaged and accessible.

**Situational Leaders must effectively deliver communications in a way that performers can interpret and understand.**



- ❑ **Don't be afraid to overcommunicate.** Your employees are not mind readers, and you can't assume they know what you want from them. If you are ever unsure if they are clear about a task, priorities or other matter, reach out to them and start a conversation. At the very least, even if the communication may have seemed unnecessary, it's likely they will appreciate the consideration and support.
- ❑ **Establish guidelines for employee communication.** Think about the following questions to ensure consistency in communication methods across your team:
  - When is it appropriate to use email versus messaging through a platform such as Microsoft Teams, Slack or Troop Messenger?
  - If you use a project management tool, how will you use the communication functionality within that tool?
  - When is it better to use phone calls or video chats?

### PRO TIP: COMMUNICATION CHANNELS

Following are some suggestions for what each communication tool may be best for:

#### **Messaging:**

- Shorter messages (check-ins, quick questions, status updates)
- Time-sensitive messages, especially if your team regularly uses their messaging platform
- Casual conversation

#### **Email:**


- Longer, more complex messages (tasks that include several steps, messages longer than a few sentences, messages containing lists of information)
- Messages that require attachments


# COMMUNICATION


- Information someone may need to reference often
- Communication that needs to go out to a large group

## **Phone Call/Video Chat:**

- Communications that require feedback and discussion (brainstorming sessions, interviewing a subject matter expert for a project, project kickoffs)
- Walking someone through a brand new task they aren't comfortable with
- Regular one-on-one coaching sessions with an employee
- Group meetings, such as a daily or weekly team standup

 **Remember, each team and individual will be different.** Some people may want more personal communication through phone calls and video chats, whereas others may be happy with check-ins over your messaging platform. Try to smooth the transition of employees to remote work by meeting them where they're at and working together to find standard communication practices.

 **Set expectations around response time for communications.** Although it's impossible to predict what barriers may come up throughout the day, it's important to set a baseline for when teammates can expect to hear from each other and you so that they don't feel abandoned or ignored.

 **Maintain active, engaged conversations with employees about performance needs.** You will largely be relying on your employees' abilities to gauge their own needs when working remotely, but it is important that you do your part to encourage those discussions by

keeping communication channels open and contributing to an ongoing discussion about their performance.

## PRO TIP: COMMUNICATION ETIQUETTE

Become familiar with the etiquette associated with each mode of communication you use and share expectations with your employees. Practicing commonly accepted etiquette will enhance the effectiveness of your team's messages. 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

# COMMUNICATION

 **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
- Don't multitask. Give the meeting your full attention just like you would in a face-to-face meeting

**THINGS YOU CAN ASK TO EXPLORE PERFORMANCE NEEDS:**



- “I know you’ve never done this task before. How can I help you get started?”
- “Are there any questions I can answer for you before you get started?”
- “Do you have any ideas you’d like to bounce off me? If not now, you can set up some time on my calendar to talk things through.”
- “I can see you’re having a difficult time on this task. Is there anything I can talk you through to support you?”
- “Would you like me to connect you with subject matter experts on this topic to get you started?”

- ❑ **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. Encourage your employees to do the same to maintain their connections to their coworkers.
  
- ❑ **Be proactive about contacting others.** Although this is a good rule to follow in general, it is especially important when managing a remote team. Reach out often for status updates and check-ins.
  
- ❑ **Keep your communication personal.** Don’t let email become a crutch. Instead, use any tools at your disposal to maintain strong connections throughout your team and organization. Use more personal forms of communication such as phone calls and video chats when possible.
  
- ❑ **Listen carefully.** Now that you will be relying predominantly on phone calls and written messages, you must be extra vigilant for any cues that your employees need support.
  
- ❑ **Be transparent about your availability** by sharing your calendar and overcommunicate your status. Your team needs to feel connected to you now more than ever and accessibility is a large part of that.



# CONSISTENCY

Maintain the performance of your team by establishing a routine and being aware of your employees' individual needs. In times of major change, your employees will look to you for consistency and guidance.

**Situational Leadership® emphasizes that:**

Situational Leaders respond to change by leaning into it. Change is constant, but Situational Leadership® provides a consistent performance language for managers and employees to utilize as a tool to navigate those challenges.

- ❑ **Ensure all of your employees are set up for success** by confirming that they have the tools they need to be successful in their role. This will vary from role to role but will probably include a laptop, reliable internet and headphones or a headset. Many people will also need a monitor, keyboard, mouse and hard drives.
- ❑ **Set expectations with your team for the level of professionalism you will continue to expect** from them during this period of remote work. Consider setting up guidelines for them to follow in setting up boundaries such as the examples below.

#### SETTING UP GUIDELINES:



- ❑ Take remote work just as seriously as you would working in the office. This means avoiding distractions such as TV and maintaining professionalism in your presentation and communications.
- ❑ 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.

Remember, remote work may be new for the majority of your team. Don't assume these boundaries will come naturally to them and support them in any way you can while they adjust to these changes.

## CONSISTENCY

- ❑ **Be available.** It can be extremely easy to get lost in your own work and responsibilities, especially when working remotely. Your team needs to be confident that they can contact you on a consistent basis. Check your email, messages and voicemail at regular intervals to ensure consistent communication. If you need to be away from your computer or phone for a long period of time, give your team advanced notice and update them when you're available again.
- ❑ **Set boundaries for communication.** Work-life balance can be difficult to maintain when working remotely, but it's important that you set expectations for your team around when you will and will not be available. If possible, continue working the hours you regularly would in the office. Encourage your employees to do the same.
- ❑ **Pay attention to the signs of regression** in your team. Change is difficult and adjusting to new tools and practices can be stressful. If your employees seem overwhelmed or stressed, reach out to them to explore ways to help them through the transition and back on the path to development.
- ❑ **Check in with employees regularly** to make sure they are getting the level of social interaction they need from you and their coworkers and, if not, find out how you can help. Some employees may need more frequent one-on-ones during this time or may benefit from video chats rather than phone calls.
- ❑ **Commit to proactively engaging in frequent communications** with your team. Because you can no longer rely on impromptu



meetings in the hall or break room, be intentional about scheduling time on your employees' calendars and encourage them to do the same.

- **Encourage your employees to plan breaks** during their days. Proper balance is key to maintaining productivity. If your employees typically take a 30-minute or hour-long lunch break, make it clear that those expectations remain in place even when working remotely.
  
- **Be consistent in how you track success.** When working in an office, there are several visual cues for productivity. You see your team members come to work every day and can check on them at any time to see them working at their desks. When working remotely, you can no longer rely on these cues. You may need to consider other ways you can keep track of your team's productivity so that you can identify any barriers early on. This may include employees logging time, tracking tasks completed or tracking the number of communications with customers.
  
- **Don't overcommit.** It can be tempting, especially during times of extreme change, to want to push yourself harder than ever and make commitments for yourself and your team that you wouldn't make under normal circumstances. However, it is also during times of change that reliability is of the utmost importance. Missed deadlines and sloppy work will reflect poorly on yourself and your team. Don't put yourself or your team in that position and set realistic expectations for what you can get done under these new circumstances.



# LEVERAGING YOUR TECHNOLOGY

An organization's collective success is driven by the success and engagement of every employee, from the individual contributor to senior leadership level. As a manager, you are essential in ensuring clarity, communication and consistency within your team. Leadership is never one-size-fits-all, which is why Situational Leadership® provides the most reliable framework even in unpredictable events. Equip yourself with the leadership tools necessary to effectively diagnose, adapt and communicate across your team.

**“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 and your team take advantage of the online, self-directed training that is available for platforms like Microsoft Teams, GoToMeeting, etc.
- **Consider the daily interactions your team has in the office and make as many of those opportunities available for them online as possible.** Having a chat or page in your communication tool that includes all your team members is important for keeping everyone connected.
- **If your team needs extra assistance, schedule time with a subject matter expert** to lead some hands-on training for them.
- **If your team is uncomfortable with any aspect of online communication, consider hosting practice runs** or setting up practice sessions among your team members so they can practice using the tools without the pressure of an actual meeting. This may include teleconferencing or videoconferencing capabilities, project management tool functionality or proper screen sharing.
- **Use webcams during meetings whenever possible** and encourage your team members to do the same. Webcams can go a long way toward fostering connections within a remote team.

### **PRO TIP: WEBCAM BEST PRACTICES**

- 👉 Make sure you have enough light and that the light source should be 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).

Effective leadership is more important NOW than ever.

Managers need to utilize the four competencies of

Situational Leadership®:

# Diagnose, Adapt, Communicate and Advance

to help performers develop through  
times of extreme change.

## WANT TO LEARN MORE?

*Situational Leadership®: Building Leaders* provides leaders with an action-oriented framework that increases both the quantity and quality of performance conversations by matching an individual's Performance Readiness® for a specific task with the appropriate leadership style.

If you are interested in additional resources about how to lead more effectively by utilizing the Situational Leadership® Model, visit [situational.com](https://www.situational.com).