Checklist for managing teams working from home

# Purpose

When teams are working from home relationships can be challenging due to limited face-to-face communication, and unclear goals and performance standards. These remote (or virtual) work relationships present unique challenges because managers and their employees do not work together in–person. Managers in a remote work relationship with their employees can use this short checklist and guide to evaluate those relationships and identify areas for improvement.

Managers in remote work relationships can use this checklist to:

# Build solid work relationships

# Communicate effectively across locations

# Improve performance evaluation of employees

# Checklist for managing teams remotely

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| **Setting you and your team up for a successful remote work relationship** |
| 1. | Have you set goals and expectations with your employees so you both know where to focus your work efforts? | Yes | No |
| 2. | Have you discussed your different work styles, abilities, and preferences, and considered how those might impact your remote working relationship? | Yes | No |
| **Establishing open communication** |
| 3. | Have you explicitly made communication a shared responsibility owned by both you and your employees? (e.g., Have you told your employees that you expect them to address issues proactively instead of waiting for you to address them?) | Yes | No |
| 4. | Have you established communication ground rules about how and when you and your employees will communicate with one another?  | Yes | No |
| 5. | Do you use a combination of both structured and informal methods to communicate? (For example, regularly scheduled meetings combined with informal, real-time methods like instant messaging.) | Yes | No |
| 6. | Do you have a way to share work and knowledge that is easily accessible to both of you (e.g. online SharePoint, intranet)? | Yes | No |
| **Managing employee performance and behaviours** |
| 7. | When evaluating the work of your employees, do you consider both ***what*** was achieved and ***how*** it was achieved? | Yes | No |
| 8. | Do you use clearly defined metrics to make sure that work is completed, and goals are achieved? | Yes | No |
| 9. | Do you use multiple sources of feedback when evaluating your employees’ performance (e.g., feedback from team members and peers of your employees?) | Yes | No |
| 10. | Do you assess their behaviours against DET’s Values? (e.g., do you look at how team members are contributing to building and maintaining a Respectful Workplace) | Yes | No |

 **Results:** For each question to which the manager answered “No”, see the next two pages for further detail on each point to help improve his or her effectiveness as a remote manager.

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| **Setting you and your team up for a successful remote work relationship** |

1. **Establish clear goals and expectations at the beginning of your relationship** — Work with your employees to create clear goals and expectations at the beginning of your working relationship. Establishing goals and expectations will help you both know where to focus efforts even if you have few opportunities to interact in-person.
2. **Consider work styles, abilities, and preferences when setting ground rules** — You and your employees will both have different working styles that will affect how you work together, especially since you’re not in the same location. Partner with your remote employees to discuss you and your employees’ work styles, abilities, and preferences, and use them to inform the ground rules you set for your remote working relationship.

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| **Establishing open communication** |

1. **Make communication a shared responsibility for you and your employees** — Open lines of communication are critical to a successful partnership with your employees, but particularly when you work in different locations and have few face-to-face interactions. While you, as a manager, must take responsibility for communication, let your employee know they share that responsibility and that you expect them to approach you with anything that needs to be discussed.
2. **Establish communication ground rules for how and when you will communicate** — Communication can be especially difficult when you and your employees don’t work in the same location, so work together to create ground rules about how and when you will communicate with one another. Some communication ground rules to consider include:
* Methods you will use to communicate — Discuss the methods you will use to communicate, such as telephone, e-mail, instant messaging, social networking sites, and videoconferencing.
* Timeframe for responding to communications — Determine an appropriate timeframe for responding to avoid “virtual silence”, which can cause confusion and damage remote working relationships.
* Methods for sharing sensitive issues — Impersonal methods of communicating are not appropriate for sensitive issues and can hurt your relationship with your employees. Instead, use private telephone calls or face-to-face methods, such as videoconferencing.
1. **Use a mix of structured and informal communication methods** — To have a trusting, collaborative relationship with your employees, use a blend of structured communication approaches (such as weekly telephone “check-ins”) and informal, real-time communication methods (such as instant messaging). Structured approaches make sure you reserve time to discuss ongoing needs, such as performance or leave arrangements, while informal, real-time communication methods allow immediate needs to be addressed.
2. **Identify methods for sharing knowledge and work** — Determine how you and your employees will share information and work so it is easily accessible. Use technologies that can be accessed remotely and on-demand, such as project rooms, databases, and intranet portals. If you or your employees are not able to access knowledge and work as needed, you risk slowing productivity and missing deadlines.

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| **Managing employee performance and behaviours** |

1. **Evaluate employee performance based on *what* is achieved and *how* it is achieved** — Evaluate your remote employees based on ***what*** they have achieved and ***how*** they achieved it. When you and your employees work in different locations, it can be difficult to see ***how*** they accomplish their work. By focusing equally on ***what*** they have achieved, you can accommodate the different work styles of employees in locations with different norms and challenges. DET’s Values provide a framework for ***how*** people should work.
2. **Define and track metrics to make sure goals are achieved** — Use metrics that are clearly-defined, and that you and your employee agree on, to measure performance and to ensure work and goals are achieved. This is especially important in remote working relationships because there are few opportunities for you to see that work is being completed and goals are being achieved. In addition, tracking metrics will help you identify and address any problems as they arise, which you might not notice otherwise in a remote work relationship.
3. **Use multiple sources of feedback to evaluate your employees’ performance** — When you have a remote working relationship with your employees, it is particularly important to get feedback on their performance from several sources because you can’t observe them directly. You may want to seek feedback from team members, peers of your direct, stakeholders and clients.