



# DWFS OPPORTUNITY PROCESSING OUTLINE:

## MANAGING VIRTUAL TEAMS

<p>DWFS TEAM MEMBER</p> <p><b>Luke Team Lead</b></p>	<p>JOB POSITION</p> <p><b>CM Team Lead</b></p>	<p>DAYS WITH THE COMPANY</p> <p><b>1.5 years</b></p>
<p><b>STEP 1: LUKE'S INTRODUCTION</b></p> <ul style="list-style-type: none"> <li>• WHO ARE YOU?</li> <li>• WHAT'S YOUR POSITION?</li> <li>• WHAT'S YOUR QUESTION?</li> </ul>	<p><b>STEP 2: PARTICIPANT FEEDBACK</b></p> <ul style="list-style-type: none"> <li>• CLARIFYING QUESTIONS</li> <li>• LUKE'S IDEAL OUTCOME*</li> <li>• BARRIERS &amp; CHALLENGES</li> <li>• SOLUTIONS</li> </ul>	<p><b>STEP 3: BEST-PRACTICE SPEAKER</b></p> <p><b>MICHELLE BLANCHARD &amp; JONATHAN WATTS TALK ABOUT THE BEST-PRACTICES BEHIND MANAGING VIRTUAL TEAMS</b></p>

### HOW DO I: (PRESENTED BY LUKE)

- **How do I help my team achieve success and improve team morale in a virtual environment?**

### CLARIFYING QUESTIONS: (ASKED BY PARTICIPANTS)

- What do you mean by 'success'?
- How many people are part of your team?
- How do you currently conduct your team meetings?
- How seasoned is your team?
- Does your team have the technology needed for video chat?
- How did you engage your team when you were in the office?
- What expectations were set before moving to a virtual environment?
- What is your leadership style like?
- Do you have clear and concise goals for each individual on your team?
- On a scale from 1-10, how well do you know the individuals on your team?
- Are you doing an open-door policy in a virtual environment?
- What are your expectations for your team communicating with each other?
- Do you delegate tasks since moving to a virtual environment?
- What does team morale look like to you? What do you want to accomplish?
- Are you doing 1-on-1's with your team members?
- How focused is your team regarding accomplishing their individual goals?
- Does your team feel like they can come to you with time management, flexible schedules, family distractions, etc.
- On a scale from 1-10, how is YOUR morale?
- Do you meet 1-on-1 with your supervisor? Do you have a mentor?
- Have you implemented the 411 and 911 strategy with your team?

### MY IDEAL OUTCOME IS: PRESENTED BY LUKE)

- **Maintain engagement and productivity within the team and keep up with the current contractual requirements to position us for future success.**

### WHY IS IT SIGNIFICANT TO ANSWER LUKE'S QUESTION? (ANSWERED BY PARTICIPANTS)

- **To meet contractual obligations**
- **Keep morale up and teams engaged**
- **Meet goals**
- **Without morale, productivity will fall off**
- **Keep employees with us for the long term**
- **It impacts the entire organization and we all need to adapt**
- **Luke's confidence will spread to all staff**

- **Decrease turnover**
- **Develop good habits that can be used in the office in the future**
- **Shows our external customers what virtual working looks like**
- **Maintain trust with his team**
- **A staff development opportunity – strengthen and grow the team**
- **Morale creates an atmosphere of camaraderie**
- **Builds character**
- **Builds relationships**
- **Part of our culture**
- **This is practice for adapting to things in the future**
- **Helps eliminate fear**
- **Helps me build new skills**
- **Proactive and not reactive**
- **Helping us think outside the box – effective and efficient**
- **Builds innovation**
- **Maintains momentum**

#### **BARRIERS & CHALLENGES – WHAT ARE LUKE’S BARRIERS & CHALLENGES?**

- Tech limitations
- Lack of team participation
- It’s overwhelming to work from home
- Trouble prioritizing tasks
- Lack of support from his leaders
- Lack of a mentor or 1-on-1 time
- Some team members are distracted at home
- Team members with children and other obligations
- Luke’s distractions at home
- Lack of a routine or scheduling
- Unmotivated team members
- Lacks confidence
- Phone ringing off the hook with ‘little questions’
- Lack of experience working from home
- Not tech savvy
- Trouble monitoring and tracking work tasks for team members
- Maybe his teammates aren’t virtual learners
- Internal conflicts
- Potentially burnout
- Lack of discipline
- Not knowing his teammates style of working
- Feels responsible for team members lack of productivity
- Maybe team members are ‘present’ but not doing anything
- Taking on too much & mental health
- Fearful of the unknown

## **SOLUTIONS – WHAT ARE SOLUTIONS TO LUKE’S POTENTIAL BARRIERS AND CHALLENGES?**

- Ask your team for feedback
- Setup regular 1-on-1 staff meetings
- Daily check-ins with each staff member
- Video chat so you can see face to face
- Conduct virtual icebreakers
- Delegate tasks to your team to show leadership
- Send positive quotes in email to help brighten their day
- Create team building exercises to complete virtually
- Work with your staff to help develop strategies to overcome challenges
- Celebrate team success when working from home
- Showing belief in the team by giving them leadership duties
- Giving weekly or daily shout-outs
- Take time for yourself in the beginning of the day
- Identify goals and priorities
- Lead by example- creative ways to accomplish goals
- Posting pet pics or hobbies as a team
- Create a daily task tracker to know what your team is doing
- A fun, virtual team luncheon
- Set up a time for teams to meet with no work expectation
- Find a mentor, or talk with your peers and leads about how they overcome challenges
- Go for a walk while on a conference call
- Set up weekly time with your supervisor
- Use the community section of Paylocity
- Effectively communicate and using the cornerstones
- Practice active listening
- Frequent check-in’s (random)
- Express what you need & advocate for yourself
- Asking about stress levels, etc.
- Develop a good work/life balance and encourage the same for your team

## **BEST PRACTICE SPEAKER: (MICHELLE BLANCHARD & JONATHAN WATTS ANSWER LUKE’S QUESTION)**

- #1 – Encourage a work life balance
  - Managers need to have a routine
  - Take time for yourself
  - Self-care
  - Taking breaks
  - ‘Water-cooler talk’
  - Look at the positives in this situation
    - What has excited you in your work from home environment over the past week?
    - What have you learned over the last week? (personal and professional)
  - FLEXIBILITY with you AND your team
    - Scheduling, staffing needs, etc.
  - Look at options & be creative! Try to do business as usual\*
- #2 – Daily Check-in’s or Huddles
  - 1-on-1 meetings to discuss issues/problems
  - Ask team to bring their own agenda to the meeting
  - Have next steps and meeting minutes
  - An opportunity for team members to ask questions, etc.
  - Will help give you an idea of where your team is at (task list)
  - Helps everyone be on the same page & establish team unity
  - Maybe use random check-in’s for each individual check-in

- #3 – Weekly Team Meetings (via Skype)
  - Have an active work session as a team
  - Replicate real-life meetings
  - Working together as a team to increase morale
  - Create topics and facilitate a How Do I session
  - Be prepared! Always have an agenda- don't meet without one
  - Your team can tell when you're not prepared
  - Respect your team's time & stay within your scheduled meeting (wrap-up on time)
  - Express your appreciation and celebrate your staff\*
  - Try to use video chat for skype meetings to improve morale and confidence
- #4 – Having time for 'fun communication' during the day
  - Daily fun memes & Youtube links for the team to improve morale
  - Online games- remote bingo and virtual campfires
  - Walk-out-30's (take a break and walk around the building; take a break)
  - Don't forget to have 'small talk' – it doesn't always have to be about work (pets, hobbies, wellbeing, etc.)
- #5 – Soliciting feedback from teams
  - Extending your open-door policy into this virtual environment
    - Utilizing Microsoft Teams for the chat function instead of email/call overload
    - Instant back and forth; mimics open-door policy for quick conversations
  - Be authentic with your team & ask your team for suggestions
    - Is this working for you? Do you want something different during 1-on-1s? Is this a good time for you? What would you like to talk about as a team? What do you feel your priorities are?
    - Ask for feedback on team members and THEIR role AND ALSO ask for feedback as a manager (what can I do differently?)
  - Connect with your Dynamic Culture Champion (DCC)
    - Brainstorm ways to keep the team together
    - Utilize your resources- you don't have to do it alone!
  - Utilizing your current collaborative style
    - Build on your strengths
    - Listen more than you talk – this increases engagement
    - How can I be an active listener? How can I utilize the cornerstones?
  - Be present when you're asking for feedback
    - Don't multi-task just because it's virtual
    - Shut down email & turn phone volume down – limit distractions
  - Deep dive with your staff on critical issues before it become a problem
    - Stay connected and have open dialogue to identify possible issues
    - Open-ended questions with your team
    - Ask, 'what are you most concerned about' so I can help you
    - Ask, 'what's gotten in your way during this time while working from home' – helps provide solutions
- #6 – Focusing on the future
  - Setting expectations to establish a baseline
  - Set expectations for your team BUT ALSO for yourself (and communicate that with the team!)
    - I'm available from X-Y
    - I respond to email in 24 hours, etc.
  - Clarify goals and expectations with your team for full understanding
  - Find ways to look strategically at future growth/goals
    - How can you do things differently based on the Dynamic ROCKS?
    - A way to celebrate that we are doing what we say we are going to do\*
  - How can we help staff address their performance and development goals during this time?
    - DWI course(s) for professional development
    - Coordinate professional development opportunities for your team
    - As a lead, use courses on leadership!
    - Allow your team an opportunity to highlight what is GOING WELL\*
      - Share best practices within the team; different techniques and strategies that are working
  - Get creative! Give staff the ability to brainstorm and contribute to your project and future goals
    - Now is the time to set ourselves up for success

- Utilize collaborative nature and delegation skills to give people on the team a chance to showcase their strengths
- Remind ourselves, we hired this All-Star Team for a reason – we need to give people the chance to show their skills and abilities during this time. Examples:
  - Opportunities for outreach development
  - BES team put together a survey that we use when cold calling our customers (asking key questions about how we can help through this time)
  - Looking at out-of-school youth outreach (what different social media campaigns can we implement? What new platforms or messaging can we use to stay connected?)

### **QUESTIONS:**

- How do I get the team to be honest with me as a team lead?
  - Start from building rapport
  - Allow your team to trust you; build trust with your team; foster the culture of trust
  - Follow the cornerstones & lead by example
- How do you track tasks and deadlines for your team?
  - Monthly spreadsheets to track own tasks
  - Weekly Monday call-in's
  - Tracking spreadsheets (include tasks and timelines)
  - Find someone on the team that can help support you
- How do you get an employee more engaged?
  - Have 1-on-1 regardless of performance
  - Having honest conversations – “You seem like you might not be as engaged as usual. Can you tell me a little more about what’s going on?”
- What’s a good response to staff who say, “we have too many meetings”?
  - Be patient and flexible with each other
  - Don’t meet just to meet
- I don’t want to be perceived as a micromanager. What do I do?
  - Develop SMART goals with staff regarding items that you want produced
  - Establish expectations
  - Set-up details around expectations
  - Offering support and assistance as needed
  - Let your staff produce!
- Managing staff development VS working with customers
  - Identify a balance
  - Customers come first!
  - BUT, as a lead, my team is my customer. I need to help them manage their time so they can meet both priorities
  - Set up your schedule to make sure you have time to focus on both
- Should I shadow calls to customers, partners, and employers?
  - Yes, so we can catch people doing things WELL and celebrate the successes
  - It keeps engagement – it shows you care – it shows you’re engaged
  - Get permission first, but it’s a great way to effectively manage

