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# Virtual Management Best Practices

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# Set Clear Expectations with your Team

In a virtual environment, this is the first step to take

Set up time with your team to discuss the following:



## Review the management expectations guide

- Discuss how you intend to uphold the manager expectations in a virtual environment
- Share your expectations of your team in a virtual environment



## Require video use

- Video should be used for every interaction that is not a “quick call”



## What needs to be rescheduled/postponed?

- As a team, work through what changes need to be made to meetings and workflow that enable the team to hit its objectives in a virtual environment.
- Collaboration is key at this stage.



# Effective Meeting Management

Meetings are a primary way for us to get our work done. In a purely remote environment it's vital to follow these guidelines and hold others accountable to these expectations.



## Heighten comfort with logistics

Who is/isn't dialed in? Can everyone hear? Etc.



## Share webcams

Ask everyone in the meeting to share their webcam to maximize effectiveness of the meeting



## State rules of engagement

How will questions be answered? Remind everyone that one person needs to talk at a time due to slight time lags. Ask people to state their name before asking a question. Should people stay off of mute? Turn off email? Etc.



## Drive participation of every voice

Stating names when asking questions or ensuring if people have questions and polling each person (i.e. "What did you each think about that discussion point?")



## Press pause

Pause: increase frequency of pulling up or pausing to check in with the group; stop to summarize what you have discussed more often; increase comfort with golden silence



## Record it

Record essential meetings and provide the link to meeting participants as a resource.

# One-on-one Check-ins



Ensure you have **at least weekly** one-on-one check-ins scheduled with all direct reports

- ✓ **Prioritization exercise:** in your one-on-one check-ins, discuss all current workstreams and what may need to be prioritized or accomplished differently during this time of remote work.
- ✓ **Look at performance goals:** re-evaluate performance goals for each of your team members to ensure they still make sense, and brainstorm obstacles that may be new or more acute in a remote environment.
- ✓ **Examine metrics:** work collaboratively to ensure existing metrics are still relevant and if not, figure out new metrics for tracking and accountability.

Working virtually can be difficult and brand new to some. Ensure you are taking the time to understand how to **best communicate with each person** during this time.



As a manager in a virtual environment, ensure you are doing the following:

1

## **Respond as quickly as possible**

Understanding you have your own priorities and constraints, try to make yourself as accessible as possible to your team.

2

## **Set standards for various communication channels**

Discuss what communication channels will work best for your team (i.e. quick questions → online chat, tougher questions → phone call, a lot of information/data → email)

3

## **Keep in touch with teammates**

Try to have at least one touch point with each team member every day. This could be as simple as a Slack conversation to see how they are doing.

## **Pro Tip: Create a virtual “watercooler”**

Use your team chat to keep up to date with each other

If you don't have a team chat, see if you can make one!

Have team meetings every other week to catch up with each other, discuss projects, and brainstorm challenges faced in this new environment

Set up time to catch up every other week with members of your team and/or bake it into your one-on-one check-in

# Driving Accountability



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## 1 Set clear expectations for all projects/initiatives



### What?

- What is my objective?
- What outcomes should I see?



### Why?

- Why is this action important to meeting the need?
- How will this help us meet organizational goals?



### Who?

- Who is critical for meeting my objective?
- Who is doing what?



### How?

- How should I achieve my objective?



### When?

- When are key milestones and deadlines?
- What level of priority should I assign?

## 2 Set up recurring meetings to discuss progress

Create a forcing function (could even be a 15 min touch-point) to get status updates on project/initiative progress

# Managing Individuals with Personal Limitations



We are experiencing a time of great unknowns that impact our staff professionally and personally. On the personal side, you may manage someone experiencing something that will limit their ability to work normal hours or at 100%. Some examples, but not limited to, are those who are sick/caring for someone sick, mental health challenges, those who have children at home due to school closures. To help manage staff through this time...



## Practice Mindful Listening

- Fully listening to someone until they have completed their thoughts.
- Be present in understanding what they are saying and do not interrupt. Only use cues you are listening.

### Benefits

- Person feels fully heard
- Get the benefits of fully hearing out an individual
- Creates a collaborative environment



## Lead with Empathy

- The ability to experience and understand what others feel
- Doing this while still maintaining clear lines around your own and the other person's feelings and perspectives
- It is not...
  - Sympathizing
  - Agreeing with people