

# Telework Management Certificate Program

## *Course #3 What's in it for me? Supervisor Best Practices*

Hello and welcome to part three of this six course certificate program in Telework Management. In this course, our expert instructors, who will be introduced in a moment, will discuss telework from the perspective of the supervisor or manager who faces the challenge of managing people who are offsite.

To complete this program and earn your certificate, you must finish all 6 courses and score at least 80% on the test questions associated with each course. You may take a course as often as you like. All courses are free of charge, however, should you wish to earn your Program Certification with credits and CEUs, you will be required to pay a \$99 administrative fee.

Good luck and good learning.

This course and most others offers you additional resources related to the materials covered. To access them, click on the attachments folder in your module.

You can also access the notes associated with this presentation by clicking the small question mark at the bottom of the module and choosing notes.

Our instructors in this course are Mika Cross, who is the Program Director for Work Life and Wellness at USDA and the leader of this certificate series.

Mika is joined by our lead instructor today, Kate North who is a vice-president at the e-learning company e-Work

Rebecca Ayers is the Manager of Performance Solutions at the Office of Personnel Management. She telecommutes to DC full time from Raleigh NC

And last but not least, Tony Macri the Smart Occupancy Lead at the General Services Administration.

Each of our instructors brings more than a decade of experience in remote and virtual work, having been teleworkers themselves and managed other teleworkers.

And with that, over to Mika Cross to begin the course, Mika?

Thank you so much, Allan, and thanks, everybody who is participating in today's session. As you know, it's our third "Let's Talk Telework" webinar session, and really this is for our supervisors on the line today, to learn best practices from across government. As you know, if you [inaudible] into our first session with [inaudible] on the "Ten Things I Hate about Telework", this slide is from that session and we really were focusing on the return on investment from a supervisor's perspective, so things about empowerment, engagement, increases in wellness, morale, communication, collaboration, efficiency and innovation. All of those things are really key for talking through some of the myths that we overturned in our first session.

Hi, everyone. It's a pleasure joining you for this webinar today. I was so delighted to learn about this great telework management series, and just excited to see how many of you were participating. I think

you would agree the world of work is rapidly changing, requiring all of us to think differently about how we work, where we work, and specifically how we lead our teams.

At eWork, I've had the pleasure of supporting many organizations from around the world that are committed to preparing their workforce to this new way of working. And I must say, this shift that is starting to take place is truly amazing. As a society, we are rapidly redefining how work gets done, and this transformation is not impacting a few, it's impacting all of us. Our willingness to be resilient, embrace change and learn new skills will carry us into the future.

Your role, as a leader, is helping your team make this shift and it's critical and we are here to help you. Today, we will focus on a few best practices, and then I will ask our federal experts to share their insights and tips. By the end of this webinar, we want you to feel more prepared, empowered and confident in leading your team. So let's dive in.

There are 3 key points I want to make before we get into the best practices. The first one is this: work is not somewhere we go, it is something we do. It's such a simple statement, but it's so important to understand, especially as we talk about performance management, work is not somewhere we go, it's something we do. It's truly all about the work.

Number two, since we are talking about the work, regardless of where the work is being done, I'd like to suggest we move from the term "telework" to a word that is more holistic and includes all forms of mobility, formal or informal. We prefer the term "distributed work", which means that the work is spread among team members who are not in the same physical location when they're working on a project. They could reside on another floor, another building, another state, or even a different country. Again, the focus is on the work and, whilst that is a subtle difference, it captures the reality that exists for many, in that

... Point number three – we are already mobile. Thanks to technology, work is often done on the go, in between, and in a wide variety of settings. The notion that work is only done at an office or home is a concept long gone. Our best practices will not only be applicable to telework, but to the greater level of mobility that you are experiencing with your team. As some of you may know or have experienced, many organizations, including GSA, have started changing their workplace environments dramatically to focus on the work and, as such, have eliminated dedicated desks and are creating a variety of spaces, designed to support different kinds of work that happen throughout the day, providing more choices of where to work and using the resources as wisely. Sometimes, we need to concentrate and other times our work requires a lot of collaboration. Sometimes, that collaboration might be face-to-face. Other times, it could be virtual. Or maybe the combination of both. Needless to say, we need environments to support these dynamic activities. My point being, we're not only more mobile outside the office, but inside the office too. We're doing distributed work.

It's no wonder supervisors are struggling with the key question of "How do I manage a team I can't see?"

Let's face it, this is a new reality for many of us and, whilst it may be a little uncomfortable, it's here to stay. The good news is that you can learn everything you need to know to be successful in leading a distributed team.

The following are the four best practices we will be discussing today. They're managing performance and measuring results, developing a culture of trust, and that's with a capital T, effective communication and leveraging technology and, last but not least, fostering community.

Managing performance. So "How do I know if they're working?" Is a common concern for many supervisors that are starting this journey. By setting clear goals that are achievable and measurable, you will be able to provide clarity and manage by results, not line of sight. This is so key. And, leading a distributed team, you have a heightened responsibility to effectively set the goals that focus the team on results and deliverables. A key element in this process is setting goals that are achievable and measurable. To be effective requires open and frank discussions with each team member, to ensure that they fully understand and are personally committed to the goals that are being established.

Mastering goal setting is critical for driving effective team work and performance. When done well, each person will clearly understand the goals that need to be achieved, how success will be measured, how their effort will contribute to our organization, relevant deadlines and schedules that will guide their work. So be clear, concise and timely in communicating expectations to your team. Coaching and tracking the work process can help avoid project pitfalls, redundant work, and missed deadlines. Setting up weekly one-on-one calls is a great way to stay up to speed and connected to your team, helping to ensure that the work is moving forward. Bottom line, measure their performance by results, not the time you see them at the desk.

One of the more important roles you can play as a manager is to help keep the work of the team visible for everyone to see. Most of the work we do, as knowledge workers, is both invisible, but also highly collaborative, so the use of good technology tools that keeps that work accessible and visible to the team is really a must. This level of transparency helps build team trust when they can see the work that their colleagues are doing. And it can also spark some good ideas on how they might be able to help contribute.

So utilizing technologies like SharePoint or Google Docs are a few good examples. It's a great opportunity to assess your work process and tools that you're using as a team when your team becomes more distributed. It's just a great way to be able to make sure that the work is moving forward and well supported.

So let's bring in our experts. Rebecca, based upon your experience, can you share with us your views and the differences between leading a distributed team and leading a co-located team?

**Rebecca Ayers:** Thank you, Kate. But actually I think that there should be no difference between leading a distributed team from leading a co-located team. One of the things that we try to focus on and move away from is the tradition within the federal government that managing performance only happens 3 times a year. Managing performance is actually a daily activity, and for each supervisor and work team, how you manage performance can be different. Performance should be tied with the work and the type of work should dictate the frequency of interactions and how you evaluate the work outcome. Now I know this is not new to those listening, but my point is that managing performance is not having a universal approach. For example, I had a geographically distributed team and, at the very least, I have regular meetings once a week to discuss work activities with each of them. So the work we do is enough for me to do this weekly. We, of course, interact throughout the week, as work and other work activities dictate. When someone is out of the office, as a rule, we have all meetings have a conference line so

that, no matter where you are, everyone can participate. But also, I think at the end of the day, each supervisor has to decide those levels of interactions of work. And the work dictates how much information they need and how comfortable they are to manage the work.

**Mika Cross:** So one of the things that we really try to emphasize at USDA, again, is this concept of a shared responsibility. But we also work hard to enable our managers and leaders with the skills that they need to effectively manage, in a flexible, modern work environment, regardless of where they're working from. So we talk in terms of what skills they need to really lead a modern workforce, not just teleworkers. And, when you think about how leading a distributed team might be different from leading a co-located team, really those skills are not so different, but the tools that are used might differ a little bit. So, for instance, managers need to get comfortable with using collaborative technology, so ensuring that they understand how to connect with their team and their employees, as well as their customers, and even though those above them, by using things like instant messenger and video technology, in addition to the norm, like email and telephone and routing your calls accordingly. In fact, what we found, Allan, is that supervisors who actually participate in telework themselves not only are more comfortable with collaborating with their team, no matter where they are located, but they also have higher satisfaction levels in telework overall because they're confident in their own skills to work remotely and from different locations, as well as in their ability to really focus on the work and those strong performance measures rather than managing by time and attendance and who's sitting where.

So I'm curious, panelists, would you agree with our audience on this scenario? If so, why?

**Mika Cross:** So this is a really great scenario to think through. because at USDA specifically our internal policy at the department level actually goes in with the assumption that all positions are eligible to participate in some form of telework unless they fall within the guidelines that are outlined in the Telework Enhancement Act, which really dictates those who have performance issue that are documented in a fashion that's not fully successful across government or they have certain conduct issues that are documented formally in their personnel records, those are the only reasons why they would not be eligible for telework. Now that doesn't mean that supervisors can't determine the level of frequency of participation in telework though. So we do have some folks who are eligible and participate on a regular and recurring basis, what we call core Teelwork versus those that are on an ad hoc or situational basis and in my mind if you are dealing with an employee who might not be as strong in the area of time management or organizational skills needed to really perform well or at the level that you would like to see them at, my recommendation to that manager would be to go ahead and implement telework on an ad hoc or situational basis maybe for a trial period of 90 days or maybe at 120 days, where the manager can really set some clear deliverables and outline the expectations exactly as they want their employees to perform to and adhere to. That really would give the employee the opportunity to succeed in a way that possibly could lend itself to increasing telework later down the line depending on how the performance is going. That would be my recommendation.

**Rebecca Ayers:** I'm actually a little bit torn between the four answers because I think answers two and three are the correct answers. Two is first and foremost because if you are having performance issues with an individual you need to address the performance issues first. You need to have an open and frank conversation with that individual if they do ask to telework and they do have performance issues to talk through your concerns.

Developing a culture of trust. Trust is an integral component in building any strong team. Trust ensures that team members can rely on each other to achieve goals, meet deadlines and produce great results. Especially in a distributed work environment, strive to promote a cohesive and very inclusive team environment that builds team trust and strengthens the relationships. By focusing on expanding your emotional intelligence, fostering an effective conversation and cultivating an open and transparent leadership style, it will lead to building positive social capital with your team. Trust also enables you, as a leader, to feel confident in the work outcomes, despite the inability to physically oversee your team's work. When an individual believes they have your trust, performance is likely to improve. So keep in mind, building trust with your team members, that it's an ongoing process. As you launch your distributed team, frame your communications and behave yourself, so that you really earn their trust. As your team grows and matures, consider the following ways that you can maintain and invest a mutual trust. By showing respect, communicating early, making contact first, you know initiating those regular plan sessions of contact, maintaining a good connection, providing feedback, becoming more available for them, making it safe to acknowledge issues, making it easy for them to ask for help and certainly, when you see bad behavior, call it out. It really helps in terms of the team understanding that the rules and the protocols that you established as a team are to be taken seriously.

But I think, in order to build trust, the next thing you need to do is allow them to telework to put them on a telework plan that is temporary to see how they do when they telework for a temporary period of time. That way you can build trust with them, allow them to explore whether or not they can overcome this performance concern and successfully work. At the end of the day we want to set up everyone up for success in their job, so you have to be able to address the performance issue head on while allowing the employee to at least test their ability to work remotely.

And, speaking of team protocols, I believe one of the most important things you can do with your team to build trust is to co-create your own team protocols. How do you and your team work together? What can this team be willing to commit to doing? By exploring topics like frequency of meetings, preferences for communication, decision-making process and, most importantly, celebrating and recognition the good work the team is doing. It forms a social agreement that binds the team together. At the end of the day, they are the ones that are managing their agreements that they've made and they've committed to. And it gives clarity and creates a foundation of trust.

One mistake I have seen more often than not is that we focus training on only those that are agreeing to work in a formal telework position versus all of those members of the team that are working together, so what happens is that folks that are working from home may have actually more skills and competencies around what that means to be a distributed team than their counterparts that might be in the office. And there's a real opportunity, again, if you bring everybody together to really set aside and develop those team protocols and give them the kinds of training that can really enhance the team overall performance.

And knowing how important trust can be with the team. So let's check back in with our experts and get their thoughts and tips on building trust.

**Rebecca Ayers:** I think trust comes down to open communication, transparency and availability. And you have to be intentional in driving these traits in your workplace. Even if your larger organization does not embrace these characteristics of trust, I think there's a lot frontline supervisors can do to engender trust. A few years ago, I saw a brief article come across my email on leader behaviors that build trust.

And I wrote them down and I keep them on my desk because they really resonated with me and they were things that I wanted to make sure that I did as a leader in managing my team. And so the six leader behaviors are, first, make realistic commitments. Don't overstretch yourself, your team, to anyone, either to your employees or to your supervisors and your own management. The second one is follow through on promises. If you commit to do something, if you promised an employee something, follow through on that. Or be honest when you can't follow through. The third one is keep others informed. Communication is key. I like to keep my team informed even of things going on in the organization that may not impact their direct work, so that they know what's going on across the agency. Fourth is show support and avoid blame. We've all had an opportunity when work activities, products or presentations fail. We need to be careful in placing blame or... and ultimately support the team and encourage them to what went well and try to avoid singling anyone out with blame. The fifth is share information. Again, I share what comes down from the headquarters to my team, I try to be as transparent as possible on any information that I give my team. And then finally, number six is protect those not present. It's very important to be aware of what you say about other people when they're not around because people notice when other people talk about other people and so you want to be mindful of what you say, as well as when negative comments come up about others in your organization. Be careful to manage that conversation to protect them as well. So again, the leader behaviors that build trust. The first one is make realistic commitments. Two, follow through on promises. Three, keep others informed. Four, show support and avoid blame. Five, share information. And six, protect those not present. I think I like these because I think they are actions that you can take whether you're in person or whether you're managing people across the country.

**Mike Cross:** I love this idea about building trust. And one of the things our managers across the department, in many different agencies, talk about is really "Just do it". You know, when you talk about trust, you really need, again, to have those strong performance manager measures in place, clearly defined performance objectives, but also outlining what those social norms are on how you want your team to operate, no matter where they're working from. So again, not just focusing in on the teleworker, but really making it clear for your team to succeed across the board, whether or not they're working together in a co-located facility or whether or not they're working in a remote working environment. And those things will help build trust overall. We often hear our managers across USDA, who are surprised, after they implement a telework program on a larger scale. Maybe they have a small scale ad-hoc or situational agreement with their employees and, as they go to increase telework across the board, they're noting that the folks are actually communicating even more than they had expected. But it really does start with the fundamental trust that a manager gives to his employees, and then holding folks accountable against the performance measures that they set, against the objectives and expectations that they clearly communicate, and ensuring that you know, regular check-ins occur. And I don't mean check-in on whether or not someone is working by, you know, sending an email or sending a daily activity report only for the teleworkers. What I mean by that is ensuring there are opportunities to connect with the team and the employee through a variety of mechanisms, whether that be email, whether that be a phone call, and ensuring that people stay connected with the work and the mission as well, so that folks aren't excluded from, you know, high-level projects or tasks or highly visible work just simply by virtue of where they're working from.

**Tony Macri:** If it's revealed that, in essence, we don't trust each other, which may be a reality. I really think that it's the manager's responsibility to then take it to the next level. "OK, why is that? What are the root causes and what are we going to do to do it?" What I would strongly recommend, against, is to then blame, if you will, the mobility program, or the notion of telework, because work is shifting. We know that. Our hands are tied by society. Apple gives us these little devices and the world changes, if you will. You're not going to be able to control by reigning in, society is going to take care of that for us. So one of the things I really caution people about is don't turn the workplace into a detention center. You're not running detention. Meaning that don't restrict people from teleworking because you don't trust them. Don't restrict people from teleworking because they don't perform. In fact, rather ask the next question, "OK, I don't trust them as a manager or they are not performing. What do I do then?" And that then may be difficult, it may be scary, but I would look at mobility as an opportunity to engage in that conversation. And maybe even get people an opportunity to demonstrate that they can perform in a mobile environment or just perform, period.

Thank you, Tony. Those were all great comments to underscore. Let's move into the next topic that we've already somewhat touched upon, and that is really around effective communication. And, as we know with communication, it's not only speaking, but it's also listening. And it's very important for us to be able to cultivate, as managers, ways in which, again, if we're not going to be face to face and have that visual cueing, to really think about how we might be able to modify some of our communication. And some of the things that have been very helpful for me is by using more inquiry questions, not just questions that are yes or no, but really around opening up the dialogue so that you can have a deeper understanding to what might be taking place for that individual that may be remote. Also communication not only as an individual, but as a team, and I think everyone, Mika and Rebecca and Tony have all underscored the importance of having frequent conversations and communications. Some of them may be more formal, but some of them may be informal. We've also talked about how the technology can also increase our ability to build trust by showing our presence. Different types of technologies that are available for us allow us to show our availability or even to be able to communicate when you will be available. If you're not available now, when will you? Because, again, tying back to trust, if you can't reach somebody when you need to, it starts to destroy that. And again, that ties back into the team norms and protocols. How much time is going to lapse before we're going to be getting back to each other? How much time can I allow for somebody to respond? What's appropriate? And then the different types of communication styles that we all have individually, but collectively, as a team, again, back to those team protocols, let's talk about what is a preferred way for communicating. I know more and more people are texting and others are still perhaps not comfortable with that. So just ensuring that the teams know how to be able to communicate individually, but also as a team.

And, as we've talked about before, don't let things really go unspoken. Be proactive in the communication. If there are issues, don't let them really percolate, try to address them. Pick up the phone. The sooner they get addressed, the better. Again, assumptions are made and the trust can be destroyed.

The other – and then finally the last one – is really the opportunity for us to all improve this mastery around virtual meetings. And, as we're on the call today with over 1,000 people, it's amazing how we can all stay connected. And one of the key things is, with the team meeting and, oftentimes, what I find is a best practice is that, if teams are going to be onsite and for some of them, people will be calling in,

oftentimes it levels the plain field of being that odd man out on the conference call speaker phone, where you can barely hear what's going on. If you actually set up more of a web-based call would be for more team-based types of situations because it levels the playing field. It gives everybody the opportunity to see and connect and engage rather than feeling left out or not being able to have the visual cues that some of their other colleagues may be having. So that's something to consider. The other opportunity is to think about being able to be more proactive around some of these team calls again, just a leadership best practice. Have an agenda, make it clear in terms of what's going to be covered. Have other people participate in those calls. And I think another component of it is that, at the end of the day, we're still people, right? So start off perhaps, a session, by recognizing and acknowledging some of those cool things that happen to individuals so that those two can be celebrated.

So the point is really around trying to keep, through a good and proper communication, how we can stay visible and connected, that will accelerate the work, but also increase the level of engagement.

So there are different types of technology tools that are going to allow for us... When we think about this communication to be able to come together in a more humane and more meaningful way. And that what we're really trying to do is create this community, regardless of where we are working. And, as we know, that comes from building strong relationships and being able to learn together and to experience different experiences together, to really have this feeling of community.

And I think there's a really important component around how people can begin to really celebrate and to engage each other along the way. And I'd like to ask the final question to our panelist around what are some of the good way for teams to celebrate and to be recognized when they're working in a distributed way.

<Tony Macri>: I think it's just remembering that, I'm going to go back to it, it's no difference, but it's the same ways you would celebrate professional accomplishments, and events in the office can happen virtually as well. It takes at first few moments to talk about what's been accomplished and why we're proud of it and give kudos. Have that just virtual time just to connect with people. Again, I go back to the webcam being really helpful for this, because you can kind of do show-and-tell and spotlight what's going on. Professionally, personally, etc. So yeah, to me it's just a continuation.

<Kate North>: You've got a global... Yes, I would agree. And, Rebecca, I know you've got a global distributed team. How do you guys celebrate?

<Rebecca Ayers>: Sure, we actually do it in several ways. On a daily basis actually, on a weekly basis, at our staff meetings, we have shout-outs, so, halfway into the meeting, I say, "Hey, does anyone have any shout-outs for anyone this week?" and it can be something as small as "Hey, thank you for helping me with this report" or someone did a great job on the presentation last week, I just want to give him a shout-out". That's one instance. We also use a program that allows feedback to be sent directly to the individuals and then, at the end of the week, it's a whole list of everyone that received – it's called pure recognition – received pure recognition that week. And that's a little bit with organization, so beyond our team, so we can recognize people in a larger organization. And we have, a couple of times a year, we do get everybody on a video conference or live meeting and, to those in the office, we'll hold a little

rewards ceremony or celebration, where we recognize achievements and folks can call in, because there's people there who have access to cake and punch, we also make sure that we turn around and send out maybe small gift cards or something to just acknowledge those in the field who don't get to be in the room for the work ceremony. They can call in, we've got the video camera set up so they can see. And if they wish, individuals can see them as well. So we try to leverage technology as much as possible to make everyone feel included, no matter where you are.

**Mika Cross:** Now, Kate, I'd like to chime in on this because, working in HR, we love to eat. We love our snacks, we love our little pot lucks. You know how human resources professionals are and we also have a diversity team in my division, so I'm going to speak from experience and let you know what we've done kind of informally as a group over the past 3 years. It's really kind of neat. So some of our folks work full-time in other states, I have a coworker who I hope is on the line right now in Tennessee, and we work really hard to make sure that she's included all the time, and so, for instance, on her birthday, we order her favorite meal and ensured that she had her filet mignon and a cheesecake delivered at her house with a little smiley faces at the restaurant bag for her saying "Happy birthday". Even myself, my birthday happens to fall on New Year's Eve. I'm traditionally on leave that day and last year my coworkers sent me this lovely little table arrangement that came, right to my doorstep, and it was just such a nice token to know that they were thinking about me, they hadn't forgotten about me, and it was delivered right to my door, where I normally work and was on leave. We celebrate births, so we just had the birth of a little grandbaby, Anna Claire, and so we circulate photos of our children and we talk about things that go on in our personal lives. It helps us to stay connected, and even making just a little bit of little room at the beginning of our staff meeting, which occur every other week, they're at least an hour, just to have that kind of informal dialogue, both with those who are physically present in the room, but also those over the call and who are working, like I said, 50 miles away or 500 miles away, it really doesn't matter. Some of our coworkers are working from Italy right now. We make sure that we're communicating with them on instant messenger. But, more importantly, just being deliberate. So, when we celebrate team achievements – I know this sounds archaic probably to Tony – but we do this via email. Some people might say, "Congratulations, way to go on that award" and they'll put the little Powerpoint slide together that has the animation of a handclapping or something like that. Everybody chimes in with their little words of accolades and congratulation. We'd rather focus and have pizza delivered to them on occasion, for a lunch. So, if we're hosting a pizza lunch in person, we'll be sure to try to include the people that are working who can't physically be there because they are too far away to be able to hop in a plane and come, and we make sure they're connected at all meetings through our virtual technology that we have available. So those are just some of the examples at USDA that my particular team to make sure that we're celebrating and including everybody regardless of where they're working.