

MANAGING REMOTE TEAMS



INSTRUCTOR GUIDE

½ DAY COURSE

HRDQ[®]

MANAGING REMOTE TEAMS

Copyright © 2008 TreeLine 2008
Published by HRDQ
2002 Renaissance Boulevard #100
King of Prussia, PA 19406

Phone: (800) 633-4533
Fax: (800) 633-3683
Web: www.HRDQ.com

No part of this publication may be reproduced or transmitted in any form or by any means except as permitted under HRDQ's End User License Agreement, and the 1976 United States Copyright Act (17 U.S.C.) sections 107 and/or 108. Inclusion in any publication, whether for commercial or non-commercial purposes, is prohibited. Requests for permission to reproduce or reuse this content outside the terms of the End User License Agreement, should be addressed to permissions@hrdq.com or (610) 279-2002.

For additional Reproducible Program Library licenses please contact the HRDQ Client Solutions Team at (800) 633-4533.

The material in this publication is provided "as is." HRDQ disclaims any warranties, expressed or implied, regarding its accuracy or reliability, and assumes no responsibility for errors or omissions. To the extent permissible by law, HRDQ accepts no liability for any injuries or damages caused by acting upon or using the content contained in this publication.

Version 2.0
Last updated December, 2008

ISBN 978-1-58854-527-5

Reproducible Program Library—End-User License Agreement

IMPORTANT! PLEASE READ!

The following terms and conditions are a legal agreement between Organization Design & Development, Inc. DBA HRDQ (“HRDQ”) and You, Your organization, its subsidiaries, affiliates, and legal partners (“You”) regarding the Reproducible Program Library (“RPL”).

You may use the RPL only in accordance with the terms of this agreement as set forth below.

1. License Grant. HRDQ hereby grants You a non-exclusive and non-transferable license to download, reproduce, customize, and otherwise make use of the RPL within the terms of this agreement.
2. Proprietary Rights. The RPL is the sole and exclusive property of HRDQ and/or its authors including all right, title, and interest in and to the RPL. Except for the limited rights given to You herein, all rights are reserved by HRDQ.
3. Term. This Agreement is effective upon acceptance, and will remain in effect in accordance with the term of the license purchased. The specific term of this Agreement is defined on the sale invoice provided You at the time of purchase and available thereafter from HRDQ.
4. Authorized Use of Library. For the term of this license, You may:
 - (a) Store the RPL on a computer,
 - (b) Amend, edit, and change the RPL provided that all original copyright notices, and trade and service marks, remain intact and appear on this agreement and amended versions and reproductions thereof,
 - (c) Print and distribute paper copies of the RPL for educational or training activities, whether with direct employees, students, agents, or clients, and,
 - (d) Resell the RPL, in whole or in part, provided You have a current reseller agreement with HRDQ.

You may not:

- (a) Translate, reverse engineer, decompile, disassemble, or create derivative works based on the RPL,
- (b) Include the RPL, in whole or in part, in any publication, product or service offered for sale,
- (c) Lease or loan the RPL,
- (d) Distribute the RPL through the means of a removable storage medium, such as CD-ROM or DVD,
- (e) Copy or upload the RPL onto any bulletin board service or public Internet site, or,
- (f) Sublicense or reassign this license.

5. Termination. Failure to perform in the manner required in this agreement shall cause this license to automatically terminate and HRDQ may exercise any rights it may have. Upon natural expiry of the term, unless renewed by You with HRDQ, access to the download site will be denied and all passwords rendered inactive. Upon termination, for whatever reason, You must destroy all original and amended versions of the RPL, in any and every format, and certify as such, in writing, to HRDQ upon request. All provisions of this license with regard to the protection of the proprietary rights of HRDQ shall continue in force after termination.

6. Warranty. The RPL is provided “as is.” HRDQ warrants that the RPL does not violate any copyrights, trademarks, trade secrets, or patents of any third parties. HRDQ disclaims all other warranties, expressed or implied, regarding its accuracy or reliability, and assumes no responsibility for errors or omissions. To the extent permissible by law, HRDQ accepts no liability for any injuries or damages caused by acting upon or using the content contained in the RPL. If any part of the RPL is defective in workmanship or materials, HRDQ’s sole and exclusive liability, and sole and exclusive remedy for You, shall be replacement of the defective material. HRDQ’s warranty shall survive the termination of this agreement. Some states do not allow exclusions or limitations of implied warranties or liability in certain cases, so the above exclusions and limitations may not apply to You.

7. Permissions. Any other use of the RPL not defined in this agreement is subject to the written approval of HRDQ.

HRDQ, 2002 Renaissance Blvd. #100, King of Prussia, PA 19406, 610.279.2002, www.hrdq.com.

Instructional design and learning philosophy

We are committed to providing the best core skills content possible for Instructor-Led Training (ILT). The following principles are applied in the development of programs:

Sound Instructional Design

All course content is developed using a variety of research techniques. These include:

- Brainstorming sessions with target audience
- Library research
- Online research
- Customer research (focus groups, surveys, etc.)
- Subject Matter Experts (SME)
- Interviews with trainers

Expert instructional designers create imaginative and innovative solutions for your training needs through the development of powerful instructional elements. These include:





- Learning objectives — effective tools for managing, monitoring and evaluating training
- Meaningfulness — connects the topic to the students' past, present and future
- Appropriate organization of essential ideas — helps students focus on what they need to know in order to learn
- Modeling techniques — demonstrate to students how to act and solve problems
- Active application — the cornerstone to learning — helps students immediately apply what they have learned to a real-life situation
- Consistency — creates consistent instructions and design to help students learn and retain new information
- Accelerated learning techniques — create interactive, hands-on involvement to accommodate different learning styles

Application of Adult Learning Styles

Adults learn best by incorporating their personal experiences with training and by applying what they learn to real-life situations. Our experienced instructional designers incorporate a variety of accelerated learning techniques, role-plays, simulations, discussions and lectures within each course. This ensures that the learning will appeal to all learning styles and will be retained.

Course timing

Module One: Today's Reality

Type of Activity	Segment	Time
	Reality of remote supervision	15
	Benefits and challenges of remote supervision	10
	Why is it difficult to manage remote teams?	10
	Sample telecommuter agreement	10



Reading



Written Exercise



Facilitate



Group Activity

Module Two: Organizing Your Team

Type of Activity	Segment	Time
	Where are you now?	10
	Getting off on the right foot	10
	Creating a team charter	15

Course timing

Module Three: Virtual Management



Reading



Written Exercise



Facilitate







Group Activity

Type of Activity	Segment	Time
	Developing and maintaining trust	10
	Dealing with perceived loss of control	5
	Proactive coaching	15
	Results-oriented management	10
	Long-distance team building	15
	Long-distance celebrations	5

Course timing

Module Four: The Digital Workplace

Type of Activity	Segment	Time
	Making the most of conference calls	10
	Web meetings and e-mail	10
	Using "teamware" to boost productivity	10
	Intranet applications	10



Reading



Written
Exercise



Facilitate



Group
Activity

Contents

Licensing agreement.....	iii
Instructional design and learning philosophy.....	iv
Course timing.....	v
Course objectives.....	x
Module One: Today’s Reality	
Reality of remote supervision.....	2
Benefits and challenges of remote supervision.....	3
Why is it difficult to manage remote teams?.....	4
Special issues for telecommuters.....	5
Sample telecommuter agreement.....	6
Module Two: Organizing Your Team	
Where are you now?.....	12
Getting off on the right foot.....	14
Creating a team charter.....	15
Module Three: Virtual Management	
Developing and maintaining trust.....	18
Dealing with perceived loss of control.....	19
Proactive coaching.....	20
Results-oriented management.....	21
Long-distance team building.....	22
Long-distance celebrations.....	23
Module Four: The Digital Workplace	
Making the most of conference calls.....	26
Using “teamware” to boost productivity.....	28
Intranets.....	29

Appendix

Action plan..... 32
Course review 33
Solutions for every training challenge 34

Course objectives

Successful completion of this course will increase your knowledge and your ability to:

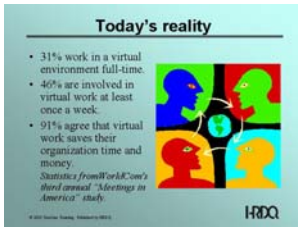
- Recognize the benefits and challenges of remote supervision
- Monitor legal and safety issues for telecommuters
- Assess the traits and habits that contribute to success
- Acclimate new employees to the team successfully
- Develop expectations for communications and meetings
- Develop and maintain trust
- Avoid the tendency to micromanage
- Engage in proactive coaching
- Implement a results-oriented management style
- Conduct conference calls effectively
- Choose appropriate collaborative software
- Establish Intranets to facilitate knowledge sharing
- Hold long-distance celebrations



ModuleOne



TODAY'S REALITY



Welcome the group, introduce yourself, cover the logistics and program objectives.

Activity: Because this is essentially a new team that will exist for half a day, conduct your favorite ice-breaker activity.

What is remote supervision?
Managing teams across space, time, and organizational boundaries.

There are two aspects that contribute to the reality of remote supervision:
Telecommuters and geographically distributed employees.

Statistics regarding Telecommuters are from a survey conducted by the International Telecommute Association and Council (ITAC) in 2001.

For another perspective, consider this quote from Jessica Lipnack, coauthor of *Virtual Teams*: "MIT's Tom Allen has been doing research for more than 20 years. Data indicate that when people are more than 50 feet apart, their likelihood of collaborating more than once a week is less than 10%. **Point:** You don't even have to be in two different offices to need a remote management mind-set."

Reality of remote supervision

Telecommuting

Twenty-eight million, or 1 in 5 employees in the United States, engage in some form of Telecommuting.

- at home
- on the road
- in satellite offices

The typical Telecommuter works at least one day per week away from the office.

Geographically distributed employees

- Multinational offices spanning the globe
- Expertise located at another office
- Joint ventures with other organizations
- Cheaper development cost in Third World countries
- Subcontract or outsource part or all of a project
- One physical location is not enough to contain all staff

Benefits and challenges of remote supervision

Benefits

- Increased productivity
- Lower overhead costs
- Increased job satisfaction
 - Greater balance of work and non-work life
 - Greater commitment to their organization
- Less pollution and traffic congestion (for Telecommuters)

Challenges

- Resistance to managing by results, rather than “line of sight management”
- Over-reliance on or resistance to new technologies that facilitate remote supervision
- Consistent use of data security measures and procedures
- Equitable selection of workers who participate in remote management—as supervisors or team members
- The need to share information and establish best practices regarding the challenges, trends, and applications of remote supervision

Benefits on this page are from the ITAC survey previously cited. Among the reasons given for increased job satisfaction are an improved ability to concentrate, access to high-speed connections and a better balance between work and family responsibilities. Other benefits (not documented in the survey but reported anecdotally) include less stress, less commuting pressure, reduced absenteeism caused by day-to-day personal needs, improved ability to recruit and retain workers and improved management abilities due to management by results rather than line-of-sight management.

Challenges:

- Overcoming myths such as: “Out of sight means out of control!”
- Make certain you provide necessary technical training and support, but realize technology isn't the main issue. Quote from Lipnack/Stamps (authors of *Virtual Teams*): “People confuse virtual teams with technology. It's 90% people and 10% technology. Some of the best virtual teams use very little technology. E-mail serves the purpose for many efforts.”
- Beware of EEOC exposure when choosing who will participate—especially Telecommuters; that's usually a risk issue in informal programs.

Provide examples of successful and unsuccessful experiences with remote supervision.

Technology adoration: E-mail, chat rooms and desktop conferencing are tools that make effective teams better—but they can't fix a team that is flawed in the first place.

Big picture versus detailed perspectives: When multiple sites are involved in a project, there is usually someone in charge of the overall project. However, seemingly unrelated problems reported separately at each site may actually be connected, and managers often lack information to link the issues.

Tracking costs: Costs incurred at individual locations may not be attributed to the project until total project costs have escalated, or perhaps never, leaving inaccurate information about the actual project cost.

Discovering the sources of problems: Finding the true source of a problem is always difficult; with geographically dispersed teams it's just that much more difficult. For example, a software bug could be created by merging software from two places incorrectly, not because of something wrong with the code itself.

What this all comes down to in one word is "communication."

Why is it difficult to manage remote teams?

Problems shared by remote teams

- Technology adoration
- Balancing big picture and detailed perspectives
- Tracking costs
- Discovering the real sources of problems

Problems common to any team

- False consensus
- Underground conflict
- Closure avoidance
- Calcified team meetings
- Uneven participation
- Lack of accountability
- Forgetting the customer

Special issues for telecommuters

Legal and safety issues

- Worker's compensation
- Automobile insurance
- Equipment insurance
- Liability insurance
- State and local income taxes
- Home business deductions
- Mileage reimbursement and other work-related expenses
- Software licensing
- Regulatory compliance (e.g., OSHA, ADA)

Crafting an effective agreement

- Equipment ownership
- Availability on-site
- Job assignment versus entitlement



Legal and safety issues: Participants should consult their own legal counsel. However, a couple of items are discussed in the trainer notes on the next page.

Crafting an effective agreement: Components typically include the following information:

Equipment provided by the company for use at home remains the property of the company and must be returned in case of separation or termination. Upon request, telecommuters must come into the office for meetings or other purposes - and the manager has the right to end the telecommuting arrangement if the employee's work falls below acceptable levels. Telecommuting is a job assignment, not a benefit or entitlement. No one is guaranteed the opportunity to become or continue working as a telecommuter.

Insurance issues: Who provides insurance; whether the employee's or the employer's insurance covers remote worksite equipment for damage, accidents or theft; and whose coverage applies to injuries an employee suffers at the remote worksite or liability to third parties arising from a Telecommuter's acts. It's a good idea to check coverage issues with the employer's personal property, general liability and worker's compensation insurance carriers, as well as with each Telecommuter's homeowner's insurance carrier. It may be possible to have the employer added as an additional insured on employees' homeowner's policies when the employer installs expensive equipment in the employees' homes.

Equipment and services: What equipment (computer, printer, phone, furniture) and services (phone, data transmission) employees need at remote worksites; and who pays for each item or service.

Maintenance, repairs and supplies: Who provides and pays for maintenance, repairs, upgrades, and supplies.

Access and security: The employer's right to monitor communications involving its customers and other employees; how the employer can review and retrieve any data, program, or other information stored on any of its computers or other equipment at the remote worksite; and how to safeguard proprietary information or products an employee accesses from outside the central workplace or develops at a remote worksite.

Sample telecommuter agreement

This agreement was developed by Gil Gordon Associates. For more information on telecommuting, visit www.gilgordon.com. You are encouraged to consult with a qualified professional to adapt this generic agreement for your own use.

The purpose of this agreement is to clarify some of the issues involved in a telecommuting program sponsored by Company XYZ for some of its employees. Because telecommuting is a relatively new way of working, some of the standard policies and procedures we have in place to cover work in the office may not apply, or have to be changed. Also, there are new conditions that arise that were never intended to be covered by Company XYZ policies.

Please read this carefully and discuss it with your manager or your Human Resources representative if you have questions, and also, perhaps, with your spouse, if applicable.

1. The telecommuting program at Company XYZ is an experiment to see how well the work-at-home concept works for the ABC department and its employees. We expect to continue with telecommuting as long as we believe the results are satisfactory, and there is no definite ending date set at this time. However, we expect the pilot program to last approximately six months.
2. As a telecommuter you are volunteering for this program based on having been given thorough information about the program and the pros and cons of telecommuting. You, like Company XYZ, have every reason to believe it will work out. However, if you find that telecommuting is not to your liking and want to return to your office work location you can do so by notifying your manager. Those who are selected as telecommuters are being asked to commit to a minimum trial period of three months. We believe this is the least amount of time needed for everyone to learn how well telecommuting works. If, however, you or your manager find that there are serious personal or work problems arising before three months are up, you certainly will be able to return to your job full-time in the office sooner.
3. While we expect this program to continue, it is possible that it may be terminated at the discretion of Company XYZ management. If it is terminated, you will be asked to return to your job at your office location. Also, if your work performance suffers and your manager decides it will be in your best long-term interest to return to the office full-time, you will be expected to return to the office. If you choose not to return on the expected date, this will be considered to be a voluntary resignation and will be treated as such under our standard policies.
4. Telecommuting is not an employee benefit intended to be available to the entire ABC department or to other departments at this time. As such, no Company XYZ employee is entitled to, or guaranteed the opportunity to telecommute.

5. Your salary, job responsibilities and benefits will not change because of your involvement in the program, except as they might have changed had you stayed in the office full-time, e.g., regular salary reviews will occur as scheduled, and you will be entitled to any company-wide benefits changes that may be implemented. You agree to comply with all existing job requirements as now are in effect in the office.
6. Your total number of work hours are not expected to change during the program, and you will be responsible for providing information for the weekly time sheet according to standard Company XYZ policy. In the event that you expect to work more than the standard number of hours, this must be discussed and approved in advance by your manager, just as any overtime scheduling would normally have to be approved.
7. Your daily work schedule for the days when you are working at home is subject to negotiation with and approval by your manager. If your job duties allow it and your manager feels a change would not impair your ability to be in contact with coworkers, you are free to vary your hours to suit your preference. Your manager may require that you work certain "core hours" and are accessible by telephone during those hours.
8. We are planning to work toward a goal of three days per week at home for all telecommuters. We will begin with one day a week for the first month and will then increase it depending on your willingness and your manager's assessment of the quality of your work and the type of supervision you need.
9. There may be times when you will be requested to come into the office on a day that you might have planned to spend at home. Company XYZ and your manager will try to minimize these unplanned office visits, but we ask that you recognize the need for them and agree to come in when requested. Similarly, there may be weeks when you have to spend more time than planned (up to the full five days) in the office when the nature of the workload requires it. It will be your responsibility to come into the office as requested during these times.
10. Company XYZ will provide the necessary computer, modem, software and other equipment needed for you to do your job. All of these items remain the property of Company XYZ and must be returned to Company XYZ upon request, in case of an extended illness, upon your resignation or termination, or if the program ends. When they are to be returned, you agree to return them yourself or to allow Company XYZ to arrange to pick them up from your home.
11. Company XYZ will reimburse you for the cost of installation and monthly service on a telephone line to be installed for your use during the program. This is considered to be for Company XYZ purposes only and not for personal use. Company XYZ will reimburse you for all Company XYZ-related business use of this telephone line when you submit a reimbursement request. It will be your responsibility to insure that no one else has access to the phone.
12. Office supplies as needed will be provided by Company XYZ; your out-of-pocket expenses for other supplies will not be reimbursed unless by prior approval of your

ADA compliance: The main issue is whether or not telecommuting should be offered to disabled employees as a reasonable accommodation under the Americans with Disabilities Act ("ADA"). Several cases resulted in ruling against allowing telecommuting; however, the court emphasized that it based its decision on the specifics of the plaintiff's disability and job duties and not on any presumption against telecommuting as a reasonable accommodation. So it's reasonable to assume that disabled employees who can no longer perform their in-office jobs should be allowed to telecommute if they can perform the essential functions of the telecommuting job.

manager. Also, Company XYZ will not reimburse you for travel expenses to and from the office on days when you come into the office, nor for any home-related expenses such as construction, renovations, heating/air conditioning, lighting or electricity.

13. The computer, modem, software and any other equipment or supplies provided by Company XYZ are provided primarily for use on Company XYZ assignments. However, you can use these items for reasonable personal purposes as long as these do not create any conflict of interest with your job. The equipment and software should not be used by other household members or anyone else. Company XYZ-owned software may not be duplicated except as formally authorized.

14. The security of company property in your home is as important as it is in the office. You are expected to take reasonable precautions to protect the equipment from theft, damage or misuse. You are required to contact your homeowner's insurance carrier to determine to what extent this property is covered under your homeowner's policy. If the Company XYZ property is NOT covered, you agree to notify your manager and, if requested, take out additional coverage at Company XYZ's expense to cover the property.

15. Any Company XYZ materials taken home should be kept in your designated work area at home and not be made accessible to others. In no case will you take proprietary or confidential materials home except with the approval of your manager.

16. Company XYZ is interested in your health and safety while working at home just as it is while you work in the office. For this reason, you are required to maintain a separate, designated work area at home. Company XYZ has the right to visit your home work area to see if it meets company safety standards; such visits will be scheduled with at least 24 hours' advance notice. Any equipment provided should be placed where it is adequately supported and there is no danger of it falling. It should be connected to a properly-grounded electrical outlet and all wires kept out of walkways. If you have any questions about the adequacy/safety of your home work area, Company XYZ will help you in this regard.

17. Company XYZ will be responsible for any work-related injuries under our state's Worker's Compensation laws, but this liability is limited to injuries resulting directly from your work and only if the injury occurs in your designated work area. Any claims will be handled according to the normal procedure for Worker's Compensation claims.

18. Telecommuting is not to be viewed as a substitute for dependent care. Company XYZ expects that you will make arrangements for someone to care for your children or other dependents (if applicable) if needed. The company recognizes that one advantage of working at home is the opportunity to have more time with dependents, but it is your responsibility to insure that you are fully able to complete your work assignments on time.

19. It will be your responsibility to determine any income tax implications of maintaining a home office area. Company XYZ will not provide tax guidance nor will the company

assume any additional tax liabilities. You are encouraged to consult with a qualified tax professional to discuss income tax implications.

I have read and understand this agreement and accept its conditions.

EMPLOYEE SIGNATURE _____ DATE _____

COMPANY XYZ REPRESENTATIVE
SIGNATURE _____ DATE _____






Reproducible Training Library



DELIVERING HIGH-QUALITY, CUSTOMIZED TRAINING HAS NEVER BEEN SIMPLER.

The Reproducible Training Library offers a full suite of training solutions, in three formats:

-  Instructor-led Classroom programs with reproducible instructor and participant guides
-  Self-study e-Learning with freely distributable self-study module in Microsoft PowerPoint© format
-  e-Books in freely distributable pocket book Microsoft Word© format

All formats can be easily customized so it's your training, your way. Why spend the time when we've done the work for you?

Get started today!

Download the Info Kit hrdqstore.com/rtl-info or call our Customer Service Team at **800-633-4533**

ABOUT US

HRDQ is a trusted developer of soft-skills learning solutions that help improve the performance of individuals, teams, and organizations. We offer a wide range of resources and services, from ready-to-train assessments and hands-on games to facilitator certification, custom development, and more. Our primary audience includes corporate trainers, human resource professionals, educational institutions, and independent consultants who look to us for research-based solutions to develop key skills, such as leadership, communication, coaching, and team building.

At HRDQ, we believe an experiential approach is the best catalyst for adult learning. Our unique Experiential Learning Model has been the core of what we do for more than 30 years. Combining the best of organizational learning theory and proven facilitation methods with an appreciation for adult learning styles, our philosophy initiates and inspires.

**DOWNLOADABLE,
CUSTOMIZABLE, REPRODUCIBLE
& AFFORDABLE**

For more information or to place an order, please call or visit us at:
HRDQSTORE.COM | 800-633-4533