

Second Edition

# A Guide to *Managing* Remote Teams

FOR MANAGERS



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# Intro: How To Use This Guide

Dear manager who wants to manage their remote team well,

You're feeling it. Managing a remote team feels a little different. And, you're not precisely sure what you should do about it.

Perhaps it's your first time managing a remote team. Or perhaps you've been managing a remote team for a few years, but feel like you still have no clue what you're doing. Either way, there seems to be a complete dearth of practical resources on how to exactly manage a remote team well.

That's where this guide comes in.

Here at [Know Your Team](#), we surveyed 297 remote managers and employees about remote work, and cited conversations from almost 1,000 managers who are a part of our online leadership community in [Know Your Team](#), and distilled research and books on remote work from the past 10+ years. My hope is to save you some time and energy – and get you straight to the most applicable, most helpful information.

How should you use this guide? Read what you want, when you want.

My only ask is that you share your own experiences on working remotely and managing a remote team, yourself. This guide is only as good as the feedback I receive on it. Please drop me a note at [claire@knowyourteam.com](mailto:claire@knowyourteam.com). I'll add your thoughts directly to this guide.

The more we can share about what's worked and what hasn't, the more progress we'll all make as leaders. Thank you for wanting to learn from our collective knowledge – and contribute to it.

Look forward to hearing from you,

- *claire*

# Who The Heck Am I?



Howdy! My name is Claire Lew, and I'm the CEO of Know Your Team, software that helps managers become better leaders. Our tools help new managers hold effective one-on-one meetings, build rapport in their teams, get honest feedback, and share status updates. We also give new managers written guides on leadership (just like this!) based on data from 15,000+ people, live webinar sessions ranging on topics from "How to Coach an Underperforming Employee" to "How to Be Successful as a New Manager," and access to an on-line community of 1,000+ managers to learn from. We've helped over 15,000 people in 25 countries at companies like Airbnb and Kickstarter.

My mission in life is to help people become happier at work. I started Know Your Team over four years ago because I felt like I couldn't speak up as a former employee – and I've dedicated my life to helping leaders become better ever since.

I speak internationally on how to create more open, honest workplace environments, and has been published in Harvard Business Review, CNBC, Inc, Fortune, among others. I'm also an adjunct professor of entrepreneurship at my alma mater, Northwestern University. Say hi to me on Twitter at @claireilew.

# What Remote Managers Do Differently

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**The 4 biggest things that remote leaders do differently...**

## “Claire, what do managers of remote teams have to do differently?”

I recently spoke with a manager who was asked to run a remote team for the first time in her career. She asked me this question. I could tell she was hesitant — perhaps even nervous about it. She'd never managed a remote team before.

“Do I need to shift some of my attitudes or behaviors?” she elaborated. “What do I need to do as a remote leader to make sure we're as successful as when we were co-located?”

I had to pause and think about her questions for a minute.

Even though I've been a CEO of a remote company for more than five years, I'd never explicitly thought about the difference between what a remote leader requires vs. what a co-located leader requires. But when posed the question, I realized there are certain things I deliberately focus on as a remote leader. And, I've noticed other leaders of remote teams focusing on similar things, too.

This isn't to say that co-located managers are a world apart from remote managers. In fact, in the survey we ran with almost 300 remote managers and employees, we found that most people who'd worked both in remote and co-located environments found the two to be only moderately different (59% of remote managers said this).

Rather: As remote manager, you cannot survive without doing certain things. You have to do things a little differently.

Based on our survey we conducted with almost 300 remote managers and employees, insights from our online community in [Know Your Team](#), [The Water-cooler](#), and what I personally strive to practice as a leader, here are the 4 biggest things that remote leaders do differently...

## Switch from “Speak first” to “Write first.”

The biggest difference between managing a remote team versus an in-person team is what you could have guessed: Communication. In our survey, 30% of managers said that "how people communicate with each other on the team" was the biggest difference between managing a team remotely versus managing them in-person.

When it comes to communication, there's one form that is more popular than others in remote teams: Writing. Specifically, "writing synchronously (e.g., chatting via Slack, Basecamp, etc.)" was cited as the primary form of communication in remote teams (45% of survey respondents said this).

This is a big departure for most managers who are used to operating in co-located teams. When you have a question, the instinct is to talk to someone about it — not write it out. When you have a new project to kick off, you hold an in-person meeting. When you have a question, you walk over to someone's desk to ask them about it. However, in remote teams you don't say it, you write it.

On the contrary, quite predictably while in-person, most managers default to in-person meetings as their primary mode of communication (29% of survey respondents said this). Only 6% of managers and employees in remote companies said that in-person meetings were their primary mode of communication.

The most successful remote managers understand this, and are diligent about writing — clearly, precisely — to communicate with their team on a daily basis. In [Chapter 2](#), we'll discuss specific tactics and best practices for communicating in remote teams, in greater detail.

# Trust your employees... for real.

As a leader, you have to trust your employees, irrespective of if you're in-person with them or remote. But as a remote leader, that trust becomes even more paramount. According to remote managers, "building trust and rapport across the team" is the #1 thing managers should prioritize (33% of remote managers said this), what new managers most frequently overlook (25% of remote managers said this).

On a personal note, as a remote CEO, I couldn't operate day-to-day if I didn't have our team members. If someone goes out and runs to the grocery store in the middle of the day... so what? If someone takes the afternoon off to go watch their kid's school play... so what? In fact, it's great that they get to do those things, live their life, and get work done too. It doesn't matter how many hours are being put into the work or when the work is being put in. All that matters are the results — and I trust our employees find a way to make the results happen.

Leon Barnard, a UX Designer and Writer at [Balsamiq](#) and [Know Your Team](#) customer), talked about how their CEO trusts their employees:

*“Our founder and CEO, Peldi Guilizzoni, shows a lot of confidence and trust in us. I would guess that we all actually work more effectively than we did in previous jobs where the most important thing was “looking busy” for the boss... Being so distributed, we couldn't function without valuing trust and autonomy. Peldi doesn't micromanage. At this point he couldn't, even if he wanted to.”*

Paul of Litmus [put it](#) succinctly: “Trust your team... Work only gets done when you allow people to make mistakes.”

That being said, how do you trust people to get the work done, while also keeping them accountable to a high quality of work? You can read how to exactly think about performance management in [Chapter 5](#).

## Get intentional about social connection.

Naturally, when you're not in person, you're not as socially connected to your team as you might be if you were in-person. According to the survey we ran this past fall, “fostering a sense of connection without a shared location” was seen as the #1 most difficult part of being a remote manager – and the #1 most difficult part of working remotely, in general.

This matters, as research has demonstrated the value of social connection at work. For example, one [study](#) shows that individuals who had 15 minutes to socialize with colleagues had a 20% increase in performance over their peers who didn't. Furthermore, [studies](#) have shown the positive impact that social relationships have on life expectancy.

As a remote manager, this means you need to be more intentional about how your team members are connecting with one another – and how you're connecting with them. For example, many remote companies default to video as a means of creating a higher fidelity of connection. In fact, after written communication, video calls were the second most popular mode of communication in remote teams (28% of survey respondents said this).

Additionally, remote managers will invest in doing some sort of in-person team meet-up. According to our survey, we found that the most common frequency of meeting in-person was “several times a year” (25% said this), and that they spend on average \$1,001 – \$5,000 per employee (29% of respondents said this) to accomplish this.

You can read more about specifically how to build social connection in a remote team in [\[Chapter 4\]](/guides/continued-learning/manager/remote/social.html).

## Have the hard conversations, quickly.

Telling a team member something they don't want to hear is hard enough. But how do you do it when you're not in-person? Finding a way to have the hard conversations quickly is crucial in remote teams. According to our survey, the second hardest part of a remote manager's job is "communicating effectively without in-person cues" (15% of remote managers said this).

As a result, remote teams tend to emphasize structures, processes, and habits that help force hard conversations to happen sooner. For instance, more remote managers reported having a formal onboarding process (69%), compared to co-located managers (59%). And, more remote managers shared how they have some sort of mentor or "buddy system" in their team (51%) versus their co-located manager peers (41%).

You can read in-depth about specific communication best practices in [Chapter 2](#), the role that one-on-ones play in remote teams in [Chapter 5](#), and onboarding and training in remote teams in [Chapter 6](#).

Now, there are plenty of leaders who are not remote that do many of the things above... which is great! However, when you're a remote manager, these 4 things become do-or-die. Don't do them, and it's likely your team won't last as a remote one.

When you're a remote leader, you can't afford to not be a good writer. You can't afford to not be intentional about social connection. You can't afford to not trust your employees.

If anything, being a remote leader tests you as a leader in all the right ways: It forces you to communicate well, and have a strong processes for people feeling connected in your team.

As you're considering how you can become the best remote manager, keep these four things in mind as a leader. I know I'll be sending this piece over to the manager who's new to being remote, myself.

# Takeaways

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- The biggest difference between managing a remote team versus an in-person team is communication.
- “Writing synchronously (e.g., chatting via Slack, Basecamp, etc.)” was cited as the primary form of communication in remote teams (45% of survey respondents said this).
- “Building trust and rapport across the team” is the #1 thing managers should prioritize (33% of remote managers said this), what new managers most frequently overlook (25% of remote managers said this).
- The second hardest part of a remote manager’s job is “communicating effectively without in-person cues” (15% of remote managers said this).

## Put this into practice with Know Your Team:

- Communicate well in a remote team by using our Heartbeats feature, which keeps everyone in the loop on what they’re working on.
- Focus on building rapport and trust in your team with our Social Questions feature, which asks fun, non-work-related questions to everyone periodically.



# How to Communicate Well as a Remote Manager

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Here are the best practices for communicating within your team as a remote manager.



# Communication is the linchpin of any team.

But you can only imagine how much more true this is for remote teams. After all, “how people communicate with each other on the team” the biggest difference between managing remotely versus in-person, according to our survey (30% remote managers said this).

As a result, figuring out how to communicate well as a remote manager is essential.

However, it’s not entirely intuitive.

Should you use Slack all the time? How quickly should you respond to messages? How do you communicate something less concrete, like values and vision? And what about when you have to deliver a tough message or hard news?

Based on our survey with 297 people about remote work, insights from The Watercolor online leadership community, and the research we’ve done across dozens and dozens of remote companies, here are some key best practices to consider when communicating as a leader in a remote team:

## Write, write, write.

As a remote CEO, I spend 90% of my day writing. Sure, I’m writing blog posts, notes to prospects and customers etc... But I write a lot to our team. I’ll write up our strategy around marketing, how we’re doing financially, or a new experiment we should try with our customer onboarding process. I’ll riff on a new product concept or critique a customer service approach with a co-worker — all in writing. If we were a co-located company, most of this stuff would happen

in the form of meetings or chatting someone up by their desk. Or maybe I’d pick up the phone if the person was on a different floor. But in a remote company? You write it out.

Jason Fried and David Heinemeier Hansson, the co-founders of [Basecamp](#), espouse this in their best-selling book, [Remote](#), noting: “Being a good writer is an essential part of being a good remote worker.” But being a good writer is not just an essential part of being a good remote worker — it’s required for being a good remote leader as well.

I’ve observed this firsthand in the way that Jason and David both lead Basecamp, as a company. I’m looped into their all-company Basecamp HQ Project, and I remember being floored when I first saw how Jason wrote up a new idea he was introducing. His written message was crystal clear, well thought-out, and succinct. In other companies, I imagine the same message might get communicated at an in-person meeting — more off-the-cuff, haphazardly, a little all over the place. Here, I saw the power of clear writing as a means to get everyone on the same page, articulate a complex thought, and not waste a bunch of people’s time. Great remote leaders understand this, and utilize their writing as a tool.

This isn’t just true for myself, nor for Basecamp. “Writing synchronously” was most frequently reported as the primary mode of communication for remote managers (45%) in our survey. In particular, Slack was seen as the “one tool that our team couldn’t live without as a remote team” (34% of remote managers said this).

## Prioritize a process.

The deluge of communication in a remote team — especially written — may feel like a firehouse. You have an infinite number of Slack messages. Your email in-

box seems to ping with “New unread message” every minute. How do you possibly sift through it all?

The answer lies in process. You have to find a structure, a system, for how all communications are handled. Or else, it will be indeed too much.

For [Zapier](#), a remote company with 200+ people, they emphasize how they separate internal communications from external communications. Here’s what they wrote specifically in their [guide to remote work](#):

“Company and department updates, project specs, design mock-ups, and individual “Friday Update” reports moved from email to our [private internal blog](#), and the aggravating “Reply All” emails that accompanied them became easy-to-read threaded comments. Team and department feedback, along with questions and discussions, moved to team collaboration and chat app Slack, which replaced one-on-one email threads with its private messaging feature, too. And Slack even became the place we find out about new public and private blog posts with a Zapier integration.”

For [GitLab](#), a remote company with 700+ people, they’re deliberate about communicating asynchronously. Attention is finite, and in a remote team, it’s easy to have your attention pulled in too many directions with people pinging you and asking requests of you all the time. In their [remote manifesto](#), GitLab shares this kind reminder: “Can it wait a few minutes, a few hours, even a few days? Don’t take someone from their work if you don’t have to.”

For us here at [Know Your Team](#), as a remote company, we’re quite intentional about our communication processes. We have a company-wide doc called “How We Work” which outlines what to do if something is urgent, how quickly to expect that someone will get back to you, how to share what you’re working on etc. For instance, we use Basecamp for all of our entire team-wide communications, and specifically delineate how “we try to reserve Pings for things that need someone’s attention right away. Typically, we expect someone to reply to a ping within a few hours” and how “we often put non-urgent things in Camp-

fire, that people can check periodically. If you want someone to respond to something within 24 hours, best to write it as a message and not post it in Campfire.”

You can read more about exact processes and tools of running a remote team in Chapter 3.

## Default to over-communication.

Communicating as a remote CEO isn’t just about writing or a process — it’s also about the quality and frequency of your communication. While communication is critical for managers who have co-located teams, the importance of communicating well is amplified in a remote team. As [Jeff Robbins](#), founder of [Lullabot](#) (another fantastic Know Your Team customer), has [said](#):

*“If you don’t communicate well at a distributed company, you don’t exist.”*

In other words, if you don’t say or explicitly communicate something as a remote manager, your team has absolutely no idea what you’re thinking. Unlike co-located managers who might rely on small talk or one-off conversations to gauge the pulse of an employee or relay an idea to, remote managers must be much more intentional about communicating.

This couldn’t be more true than for communicating your company’s values in a remote team. As a remote leader, you can’t rely on your body language, tone of voice, or physical office relics to communicate values. You have to explicitly state them over, and over, and over. [Wade Foster](#), CEO of [Zapier](#) has highlighted this, [saying](#): “You really need to set the values of what your company is going to look like. The high-level things that you care about.” A perfect example of this is, [Automattic](#), a remote company with 1,000+ employees globally. They’re known for having a well-developed [Company Creed](#) that is shared publicly on their website.

This sometimes means over-communicating. In her [research](#), [Mandy Brown](#), co-founder and CEO of [Editorially](#) and an editor of STET, found that, “Perhaps the most persistent bit of advice I gathered — and in some ways the most counterintuitive — is the need for remote teams to over-communicate.”

As a remote CEO, I definitely default to over-communication. If I’m unsure of something, I ask questions about it. If I’m wondering if a team member understands what I mean, I share greater detail and context. This isn’t to belabor the point or to create extra work for myself or others. Rather, communication is the oil of the machine in a remote company. Without it, things simply won’t run.

## Emphasize empathy, in the absence of in-person cues.

From our survey, remote managers said that the second hardest thing for remote managers was “communicating without in-person cues” (15% of remote managers said this). A request can seem insensitive if you don’t hear what the person’s tone of voice was when they asked it. A question can seem invasive if you’re not able to see the person’s facial expression while they ask it.

One way to overcome this challenge is to create as many opportunities for you as a remote manager to get those in-person cues. Video calls and meetings are ideal for this, as they give you the closest fidelity to in-person. So instead of picking up the phone or writing a long email to a colleague, ask if they can hop on a quick video chat. In fact, in [The Watercooler](#), our online community of leaders in [Know Your Team](#), one manager remarked how they always turn their camera on for video calls – be it one-on-one meetings, team meetings, discussions, or brainstorm sessions. In our survey, remote managers and employees said that they used video to hold meetings and conversations either several times a week (32%) or every single day (22%).

The other means of compensating for the lack of nuanced expression that can happen in communication in a remote team is to afford your team a bit more grace, when receiving communications. If someone’s message comes across as short to you, assume positive intent when they wrote it. Perhaps they were quickly switching between emails. Perhaps they meant to add an “!” at the end and forgot.

When I interviewed Wade Foster, CEO of Zapier, on our podcast, [The Heartbeat](#), he echoed this, talking about how it’s hard to “read” people in a remote company – and very easy to make assumptions about how someone is feeling. So instead, what Wade does vigorously is try to clear the air. If he sends a Slack message and wonders if he came across too strongly, he’ll ask, “Bah did I overstep there?” In other words, he’s never afraid to clarify, seek understanding, and try to make sure the other person is on the same page as him.

In all cases, be it using video more often or assuming greater positive intent in communications, looking to establish more empathy in the absence of in-person cues is enormously helpful.

Communication in a remote team doesn’t have to be as overwhelming or all-consuming as it might originally need to be. As a manager, focus on your writing, your process, the frequency and quality of your communication, and the empathy that comes with it, and you’ll have a solid foundation to operate on.

# Takeaways

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- Great remote leaders understand and utilize writing as a tool.
- Find a structure, a system, for how all communications are handled – or else, it will be indeed too much.
- Default to over-communication: If you don't say or explicitly communicate something as a remote manager, your team has absolutely no idea what you're thinking.
- Create as many opportunities for you as a remote manager to get in-person cues from your team.

## Put this into practice with Know Your Team:

- Over-communicate what's going on in the team with the Heartbeats feature, which keeps everyone in the loop on what they're working on.
- Invest in building rapport and trust in your team with our Social Questions feature, which asks fun, non-work-related questions to everyone periodically.

# Process and Tools: How to collaborate effectively when your team is remote

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What to consider in order to collaborate effectively within a remote team.

# 3

# “How do you collaborate effectively if your team is remote?”

Dame Stephanie “Steve” Shirley, a famed British technology pioneer answered this question at the Business of Software Conference in Cambridge, United Kingdom (where I had the honor to speak alongside her!). She said:

*“Remote work has less to do with the tools and more to do with effective management practices.”*

I was floored by Dame Shirley’s statement – I knew she was right.

Dame Shirley ran a remote tech company in the 1960’s. Forget Slack. This was six or seven years before email was invented. So, what she’d do to collaborate with her remote team? Her staff used the telephone.

As a CEO of a remote company myself over the past 5 years and working with hundreds of remote CEOs during that time, I’d noticed how it wasn’t necessarily the tools themselves that made remote teams effective: It was how a team chose to use those tools. The processes and systems instilled about how to collaborate in a remote team – that’s what contributes to success.

Based on the research we’ve done working with thousands of remote managers, our survey we conducted with 297 remote managers and employees earlier this year, and the experience of hundreds of remote managers who are a part of our online community in [Know Your Team](#), [The Watercooler](#), here are the best practices to consider to collaborate effectively when your team is remote...

## Get the timing right.

Time and attention are sacred. As a result, a big part of collaborating effectively in a remote team is figuring out when you’ll be communicating with one another. Working hours are more ambiguous when you work remotely. Folks are in different time zones, with different preferences for when they like to be responding to messages and requests. Not to mention, we all need time to actually get work done, and not just participate in answering emails or replying to Slack messages all day.

As a remote manager, it’s your responsibility to make the timing of communication clear. You’ll want to set expectations to answer the following questions for everyone:

- What time zones are everyone working in? How will this be communicated?
- What are the expected working hours each person has? What should the overlapping working hours for folks in different time zones be?
- If you need to be offline to run an errand or are in a meeting, how will that be communicated?
- How will it be communicated when someone is on vacation or traveling?
- Are there any times team members should not be disturbed?
- What’s the expected response time to messages? Does that vary depending on what the message is, or the channel that it is delivered in?

## Match the message to the channel.

What you say can be delivered in a myriad of formats: Email, chat, video call, phone call... So to avoid the barrage of messages pelting others without any rhyme or reason, you’ll want to create some sort of delineation of what kind of

message should be delivered in which channel. Oftentimes, this is related to the salience and urgency of a message. For instance, a direct message in Slack might insinuate that a message is urgent and should be responded to within the hour... versus something posting a message in a general channel might mean it doesn't need to be looked at until the next day, if at all.

As GitLab, a remote company with 700+ people, espoused in their [remote manifesto](#): "Choose the right channel of communication according to the necessity of the task you're working on."

As a remote manager, here's what you need to clarify with your team about what channels to use for certain communication:

- What's the default mode of communication? Email? Video call? Chat? Phone call?
- Which channel / tool should be used for which kind of communication?
- Who else should be copied on a message, if anyone?
- When something is urgent, how should it be communicated? What about when it's not?
- What's the right cadence for checking in on a certain communication?

## Honor the quiet.

No communication is a communication process in itself – and an important one in remote work. With time and attention being so precious, you don't want to bombard people with messages incessantly. You must give them space to accomplish their work. As Paul Farnell, co-founder of Litmus [attested](#) to: "It's more important to give employees quiet time than it is to cram them into an open office."

Here at [Know Your Team](#), we're adamant about creating one four hour block of uninterrupted time for everyone, a few times a week, at a minimum. In fact, though our software, Know Your Team, we regularly ask our team the question, "When's the last time you had an uninterrupted four-hour block of time to work?" as a way to keep ourselves accountable that we're honoring the quiet for our own team.

## But are there tools you just can't live without?

Okay, I know Dame Shirley said that tools don't really matter in a remote team, but I do know it's helpful to have some guidance on generally what tools remote teams these days find necessary to collaborate well.

According to our survey, 34% said that Slack was the one tool they couldn't live without, 16% said Email, 14% said Zoom for video conferencing, and 11% said Google Docs.

Additionally, when we asked our members of The Watercooler, our online leadership community, with over 1,000 managers from all over the world, here were the most frequently cited tools that they use to collaborate effectively in a remote team (listed alphabetically, below):

- 1Password - Password management
- Asana - Project management
- Basecamp - Project management, communicating with clients
- BitBucket - Code hosting
- Confluence - Knowledge base



- Figma - Prototyping
- Getguru - Knowledge base
- GitHub - Version control
- Google Suite - Collaboration, email
- GoToMeeting - Webinars and one-on-one classes
- Harvest - Time tracking
- Help Scout - Help desk
- Jira - Task tracker
- Know Your Team - Social connection, knowing what people work on, team feedback
- Lessonly - Employee onboarding + training
- Loom - Quick videos to explain stuff
- Notion - Team collaboration
- Paper by Dropbox - Document collaboration
- Quip - Internal wiki
- Realtimeboard - Sprints / brainstorming
- Salesforce - CRM
- Slack - Day-to-day chatter
- Smartsheets - Project management

- TeamCity - Continuous integration
- Trello - Project-specific communication
- Twist - Internal communication
- UpSource - Code reviews
- Zapier - Cross-product integration
- Zendesk - Support
- Zoom - Video conferencing

## Put it to work.

Here at [Know Your Team](#), we put this into practice by codifying our practices for collaborating as a remote team. In fact, I wrote up a document called, "How We Work," that I share with all new hires. We update it regularly, but I thought I'd share with you a version of it, so you can see how we pull together the processes and tools in our own remote team to collaborate effectively.

### *How We Work*

#### *Day-to-Day Communication:*

***Our success is predicated on how well we communicate with one another. The more clear, respectful, and consistent we are in communicating as a team, the better! Especially, as a remote company, communication is critical. When in doubt, over-communicate.***

**Our time + attention is everything...** so we try very hard to protect both. We don't do daily stand-up meetings. We don't do pointless meetings "just to chat," period. A majority of our work requires big blocks of uninterrupted time. As a result, it's important to give each other that space, and be mindful of how our communication impacts someone's time and attention. Our default mode of communication is writing. If you've got a new idea, thought, etc... best to write it up in Basecamp or Know Your Team! However, obviously, writing doesn't always suffice. For brainstorming + riffing, strategic conversations, tough conversations, one-on-one meetings, or all-team meetings, video chats work best.

### **Using Know Your Team:**

Naturally, we also use Know Your Team to communicate with one another as much as possible. This is important because we need to know firsthand what it's like for our own customers to use our product... And we can benefit from it! Feel free to participate in using any part of it – including Social Questions, Culture Questions, 1:1s and more. Here's the #1 thing we use KYT for every day:

- What are you working on today? Every day, we share what we accomplished the previous day, and what we're planning to work on today.

### **Using Basecamp:**

If you haven't noticed, we use Basecamp for writing everything. This keeps everything in one place, and gives us a written history of everything in the company for future folks to get caught up. A quick tour of how we use Basecamp:

**Messages:** This is likely what we use most often. If you've got a new idea, suggestion, report to share, etc., it'll likely be a message. Typically, we expect someone to reply to a message within 24 hours.

**Documents + Files:** This is pretty self-explanatory. Often times, when brainstorming something or outlining something, we'll write something up as a doc, instead of a message, and tag the appropriate person we want to share it with.

**Pings:** We try to reserve this for things that need someone's attention right away. Typically, we expect someone to reply to a ping within a few hours.

**Campfire:** This is essentially a group chat. We often put non-urgent things here, that people can check periodically. If you want someone to respond to something within 24 hours, best to write it as a message.

**To Dos:** If you need to get something done, or want someone else to get something done, create a to-do, and tag the person.

**Automatic Check-ins:** These are periodic questions that are useful to answer, only when relevant. They are absolutely not required to be answered to.

**Schedule:** Feel free to put important dates etc. Here are a few day-to-day areas in Basecamp to participate in:

- What's your #1 focus this week? Every week, we share the #1 areas we're focused on this week.
- Company Chit-Chat: This is just for fun casual conversations, team-wide.

- *How was your weekend? This is just a fun one.*

### **One-on-one Meetings**

*Periodically, we'll hop on a video chat for about 1 hour with the person you work most closely with to get feedback on how things are going, discuss issues that are tough, make sure priorities are aligned, riff + brainstorm on new ideas, etc. In the beginning, these will likely be weekly or biweekly, and then later on, once a month. We can decide together what the best cadence is for you. We'll use the One-on-Ones tool in KYT to prepare for these! :-)*

### **All-Team Meetings**

*Every month, we'll hold an all-team meeting via Zoom to review the previous month (what went well, what didn't, etc.), to outline priorities for the upcoming month + quarter, to share learnings, and just to riff and catch up with one another. This is valuable time to get aligned as a company – and to see each other's faces!*

### **In-Person Meetups**

*Once or twice a year, we'll get together as a company, typically for 3 or 4 days. We'll use this time to think big picture, pick apart tough challenges, and perhaps most importantly, to hang out and have fun.*

### **Online/Offline**

*Working hours:*

*We ask that your working hours overlap with Pacific time, at least 4 hours. If you're working support, we ask that you're available from 9am - 5pm ET.*

*If you're going to be 100% unreachable during any point in the day, just give the team a heads up by posting it in your daily check-in, or adding an event in the calendar. For example: Claire's typically online by ~8am, and offline by ~6pm PT. Daniel is typically online around ~11am, and offline by ~8pm PT. Marcus is typically online around ~7am, and offline by ~4pm PT. Mandy is typically online around ~11AM ET, and offline by ~8pm ET.*

*Vacation:*

*If you're going to be out for vacation, just ping Claire at least 2 weeks in advance so we can plan for it, and add it to the calendar here: [Vacation + Important Dates](#). We also close the business down for the last two weeks of the year, with each of us rotating who keeps an eye on the support inbox, in case of emergencies.*

Hopefully, this is helpful as you think about your own processes and tools within your own remote team. And keep in mind, if you want to collaborate effectively as a remote team, it's more than just the tools itself – it's the processes that accompany it.

We all should heed Dame Shirley's words.

# Takeaways

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- Set clear expectations around communication processes such as working hours, requests, sharing ideas, and giving feedback.
- Specify which messages – and what kind of messages – go into which channel of communication.
- Honor the quiet and protect your team's uninterrupted working time.
- Invest in the right tools for communication, project management, and more.

## Put this into practice with Know Your Team:

- For remote teams, Know Your Team is a perfect tool for honoring the quiet, by enabling communications asynchronously: You can get feedback with our Culture Questions, ask fun Social Questions, and get updated on what everyone is working by way of our Heartbeats – all without disrupting them via chat or calling an all-team meeting.

# How to Build Social Connection in a Remote Team

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Virtual team building is tough. Here are 7 ways you can build social connection in a remote team, even from afar.

# 4

# I'll be shocked if you're shocked: Building social connection in a re- mote team is the hardest part of man- aging a remote team.

According to a survey we ran this past fall with 297 remote managers and employees, “fostering a sense of connection without a shared location” was seen as the #1 most difficult part of being a remote manager – and the #1 most difficult part of working remotely, in general.

It's predictable. When you work in a co-located office, you walk by someone's desk and give them a friendly “hello”, and possibly catch up with them about how their weekend was. You notice a coworker's body language appears a little “down” so you ask if they want to grab coffee later. You share a joke over lunch with another colleague when you realize you both oddly adore the same brand of obscure New Zealand mints.

Those serendipitous moments of social connection don't happen with the same frequency or fidelity when you're working remotely. As a result, the sentiments of “Ah, we're in this together” or “You've got my back” can be absent in a remote team, unless you deliberately foster them. Scholars have described these sentiments as helpful for building “affective trust” – a form of trust based on emotional bond and interpersonal relatedness. It varies from the “cognitive trust” – which springs from reliability and competence. Both are influential to performance, but affective trust tends to be more salient for a team in the beginning of a relationship, according to studies.

Other studies show how detrimental the lack of social connection in a workplace can be. In a 2018 State of Remote Work survey conducted by Buffer, they found that loneliness was the biggest downside for 21% of remote employees,

and one of the reasons that made them more likely to quit. Furthermore, in a separate survey with over 2,000 managers, 60% of respondents said they would be more inclined to stay if they had more friends at work.

The data doesn't stop there: Another study revealed that individuals who had 15 minutes to socialize with colleagues had a 20% increase in performance over their peers who didn't. Not to mention, there's extensive research that exists on the positive impact that social relationships have on life expectancy.

Given this, how do you build social connection in a remote team? I pulled insights from our survey data, as well as from our online leadership community in Know Your Team, The Watercooler, with over 1,000 managers from all over the world.

From it all, here are the most commonly cited – and reportedly most effective ways – that remote teams stay connected:

## Ditch dull icebreakers for dynamic ones.

How many times have you been asked, “How was your weekend?” or “Do you have any hobbies?” Shrug. Too many times. The questions feel tired, so the answers are tired. Rather, if your icebreaker questions are intriguing, cheeky, humorous – the answers you receive will be, too. One of my favorite icebreaker questions is, “What's the one song you can't stand right now?” We recently asked that here at Know Your Team, and the answers were nothing short of hilarious. Looking for more icebreaker question ideas? Check out the 25 specific best icebreaker questions to ask.

Many remote teams will kick off their weekly meeting with an icebreaker question or insert it during their morning stand-up meeting. Even more popular is

asking a series of icebreaker questions during the onboarding process when hiring someone new (you can read more about onboarding in remote teams below). In fact, in Know Your Team we have a fun Icebreaker feature precisely for this purpose.

## Over-emphasize onboarding.

With affective trust being so important to foster in the beginning of a relationship, onboarding new hires well becomes even more critical for virtual team building. This is underscored by our survey results from last fall: We found that 69% of remote managers and employees who responded said they have a formal onboarding process at their company.

Wade Foster, CEO of Zapier, a remote company with 200+ people, has a specific onboarding process that's often partially in-person. He explains: "AirBnOnboarding, which when we hire folks within the first month, we actually do like to have them spend a week in person out here in the Bay Area. So we'll rent an Airbnb, we'll bring their manager out here, them out here, and then spend a week working alongside them."

Other companies follow a similar model of a "buddy system" for onboarding (you can read specifically more about buddy systems in remote companies below). At Help Scout, a remote company with ~80 people, they give each new hire what they call a "work best friend" (they have a fantastic write-up on their entire onboarding process here). At Automattic, a remote company with ~1,000 people, they "do a mix of self-guided training and buddy feedback," as explained by Valentina Thörner, Happiness Team Lead at Automattic. Valentina shared with our other 1,000+ managers in The Watercooler, our online community in Know Your Team:

*"Each new hire is added to a mega-check list that will guide their work during the next 12 weeks. The list includes tasks for the new hire (e.g. "finish the course on debugging shipping extensions"), for the lead (e.g. "check access to scheduler tool, Zendesk, etc. etc.") and for the buddy (e.g. "check in with new hire about xyz"). We constantly refine and add to the check-list. It's easier to just check off a "no-brainer" task than to realize that every other hire/lead did NOT think that was a no-brainer and forgot about it."*

## Build a buddy system.

As discussed, many remote companies offer buddy systems for onboarding – but they also implement them as a fun way for everyone to interact socially and get to know each other better. In fact, in our survey, we found that 51% of remote managers and employees reported having a mentor mentorship program or buddy system.

This can take the form of assigning someone an official "mentor", with whom they have one-on-one meetings once a week or bi-weekly to ask questions, and get acclimated to the company. It could also include randomly pairing 2 – 3 people every week to have a fun video chat over something non-work related. Either way, carving out and designating a specific relationship that's shared between people is a way to be purposeful about encouraging social connections in a remote team– rather than merely hoping that an informal connection will form on its own.

Interestingly, mentorship within a company not only benefits the mentee. A 2013 study found people who have the opportunity to serve as mentors experience greater job satisfaction and a higher commitment to their employer. The benefits of having a buddy extend both ways.

## Set scheduled video chats.

If you can't talk to folks face-to-face, the closest thing you can get to is to chat over video. It may seem unnatural at first, but as one survey respondent remarked: "Get comfortable with the awkwardness of video calls, and have them often."

Help Scout organizes 15–30 minute coffee breaks over video between randomly assigned team members called [Fikas](#). At [Litmus](#), week to week, they get "Coworker Coffees" over video, drink beers on Skype, and play video games online. Other companies, as discussed in [The Watercooler](#) in [Know Your Team](#), will hold book club discussions or have specific topics or themes about video chats, such as food, music, etc.

In general, video being used for social connection in a remote team should feel more and more second nature. The most common frequency for video chats, according to our survey, was several times a week (32% of respondents).

## Carve out a dedicated non-work chat channel.

If you're a remote team, you likely already have some sort of non-work-related chat channel. Many [Watercooler](#) members who work remotely remarked on its importance. Whether it's a #cats channel in Slack, or a place to say "good morning" to everyone once you hop online, it's essential for recreating the "watercooler chat" that you might have in an in-person office. Most remote managers and employees in our survey shared that this kind of synchronous chat was their primary mode of communication (45% of respondents said this). Given this, a non-work related chat channel should fit well already into your existing workflow as a remote team.

## Invest in company retreats – and do 'em right.

At the end of the day, when it comes to social connection, nothing beats meeting in-person, face to face. According to our survey, we found that the most common frequency of meeting in-person was "several times a year" (25% said this), and that they spend on average \$1,001 – \$5,000 per employee (29% of respondents said this) to accomplish this. This can take several forms:

- Most remote companies host some sort of yearly or a few-times-a-year meet-up. At [Know Your Team](#), we try to get together at least twice a year in-person. Other companies do week-long retreats three times per year. [Balsamiq](#) takes a lighthearted, personal approach to their [all-team retreats](#) that focus on getting everyone together to have a good time. Other company retreats optimize for working together side-by-side, having strategic discussions, thinking through tough problems. If you're looking to plan a company retreat, here's [an excellent piece Buffer put together](#) about their most recent one.
- In some companies, occasionally, mini-meetups happen where only some of the team members will meet in a location for a very specific reason. For example, a design team will get together for a few days to hash out a project.
- At other companies, throughout the year, they'll fly in people to the HQ (if there is one) to kick off new projects, go to conferences together, or go to client meetings together.
- Some remote companies will often encourage team members that live closer together to meet, by reimbursing lunch etc.



- Lastly, this came up from our Watercooler members: Use Know Your Team. Managers in remote teams have found us to be particularly useful for building social connection from afar. We in fact built Know Your Team as a means to help make social interaction in remote teams easier. Everything from our Icebreaker feature, which welcomes new employees, to our Social Questions, which ask a different, fun, non-work related question periodically, is centered around this. As a remote company ourselves, it's how we get to know our own team.

Whatever you decide to implement – video chats, a buddy system, better icebreaker questions – social connection in a remote team will only happen with a little elbow grease. Be intentional. Set aside the time. Know it will require deliberation. It won't happen organically.

Sure, it's a little work. But for many, it's work well spent.

## Takeaways

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- Try incorporating icebreaker questions into your video meetings and one-on-ones that are intriguing, cheeky, humorous – and not stale.
- Instill a formal onboarding process – 69% of remote managers and employees in our survey said they have a formal onboarding process at their company.
- Have a dedicated non-work chat channel, whether it's a #cats channel in Slack, or a place to say “good morning” to everyone once you hop online.
- Invest in holding company retreats at least once a year, if not several times per year.

### Put this into practice with Know Your Team:

- Kick off icebreakers in your company and support your onboarding process by using our Icebreaker feature – it asks five fun questions every time you add someone new to Know Your Team.
- Turn on our Social Questions to have a dedicated non-work channel for answering fun questions and finding unlikely connections between employees.

# Performance Management in a Remote Team

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# 5

**Want to encourage positive performance in your team? Make sure you're doing these 3 things.**

# Most obvious to managing a team – remote or not – is that we want our team to perform well.

If only the means of doing so were as obvious!

Managing an individual's performance well, especially someone who is remote, is challenging, perplexing, and definitely not one-size-fits-all. In fact, according to our survey, "managing individual performance, while not being in-person" was the third most popular response as "the hardest part of a remote manager's job" (8% of remote managers said this).

Questions of "How do you know if someone is actually working?" or "How do you help someone from afar, if they're underperforming?" or "How do you continue to encourage and coach someone who is performing well?" are tricky questions to consider and address.

From our survey of 297 remote managers and employees, and insights from 1,000+ managers in [The Watercooler](#) in [Know Your Team](#), here are my observations on the potential answers around managing individual performance in a remote team...

## Nix your nagging paranoia.

When you're in an office, you see folks come in. You see them leave. They seem "busy." They seem productive. So, you get this nice, warm, reassuring fuzzy feeling that things are indeed "going to plan." Stuff is happening. All is well.

When you're not in an office and everyone is remote, it's different. Yes, you might see when someone is online or not. But all of sudden, you really don't know if they're working. What if someone is just on Facebook the whole day? What if they're out with friends or just spending their entire day running errands?

Your answer to that should be: So what?

Time applied does not equate to progress made. It's important not to conflate the two. As a remote manager you have to kill that nagging voice inside that asks, "Well, are they working?" You can never answer that truly even when you are in-person. So why focus on it in a remote environment?

Rather, instead of becoming consumed by your own paranoia, remind yourself that you want to focus on the results. And, the path to results is creating the best environment for a person to achieve those results.

A huge part of performance management is in fact trusting that the team you picked, and you hired, and you chose, is up to the job.

## Hold consistent, rigorous one-on-one meetings.

Most remote managers will tell you how heavily they lean on holding regular, meaningful one-on-one meetings in order to support their team and encourage their performance. This is true, of course, in in-person environments. But when you're remote, these one-on-one meetings become even more crucial.

According to our survey, the most popular frequency that remote managers hold their one-on-one meetings with their direct reports is every single week

(32% of remote managers said this), and the most common duration was 30 minutes to one hour (40% of remote managers said this).

Most remote teams will use Zoom for video conferencing for these one-on-one meetings, and ask that the video be turned on. This allows you to read body language, smile at one another, and feel as close as you might to being in the same room.

Perhaps most importantly, you want to spend time properly preparing for your one-on-one meetings. You'll only get out of your one-on-one meeting what you put in. Here are a few points of emphasis to consider when preparing for your remote one-on-one meeting:

- Take the first 10 - 15 minutes to talk about something fun, light-hearted, and more personal in the beginning. Since “building trust and rapport across the team” is the #1 thing remote managers should prioritize (33% of remote managers said this), you can utilize your one-on-one meeting to fulfill this purpose.
- Ask questions you couldn't ask in an all-team chat setting or something you wouldn't post publicly. One-on-one meetings are valuable, sacred time to get feedback and get to the bottom of issues. Save your status reports or project updates for a separate meeting, or your designated tool you use to communicate those things.
- Actively clarify expectations and ask for feedback about yourself. Some of my favorite one-on-one questions I like to regularly ask are topics that are always hard to gauge from a distance, such as: “How is your workload?” and “What about my management style would you change?” and “What have I done lately that's been annoying?”

## Review performance – but it doesn't have to be a formal performance review.

When it comes to performance management, the natural thought is that you should utilize an actual performance review. This is a popular route within remote teams, as we found that 54% of remote managers survey do some sort of performance management review.

However, more recently, performance reviews have become less en vogue. When we asked our 1,000+ managers in The Watercooler, the majority said that they did not use performance reviews formally, but sought out other methods instead. Here were some of their tips and advice around performance reviews:

- Have lightweight, meaningful check-ins twice a year, combined with regular one-on-one meetings.
- Use every fourth one-on-one meeting as the time to talk about performance instead of the traditional of the traditional performance review cycles. This is something Patty McCord, former VP of People at Netflix, recommended in a [2015 TED Talk](#). It's also what we do here internally at Know Your Team.
- Keep salary adjustments completely separate from the performance review and have it handled by HR (though performance certainly plays into this). Here's a [Harvard Business Review article](#) that discusses this more in-depth.
- Tools like recurring surveys in [Know Your Team](#) can nudge employees in the right direction.

Here's an example of a one-on-one meeting agenda that I personally used through Know Your Team that focuses specifically on performance management:

#### *Personal connection*

- *How's life? What's new?*
- *What are you most excited about your vacation next week?*
- *Anything have you worried or down lately?*

#### *Performance + feedback*

- *As you reflect on your own performance, personally, what stands out to you? What have you learned or observed about yourself?*
- *What's a recent situation you wish you handled differently? What would you change?*
- *Would you be open to me sharing some feedback with you?*
- *How is your workload?*
- *As you reflect on my personal performance, what stands out to you? What have you observed and wish was different and/or stayed the same?*
- *When have you been annoyed, peeved, or bothered by me and something I've done?*
- *What do you find challenging about my management style?*
- *What do you appreciate about my management style?*

#### *Takeaways and Next Steps:*

- *What takeaways and next steps do we both have?*

Figuring out how to manage performance well shouldn't be as daunting as it seems. Focus on creating an environment where you can trust your team, hold rigorous one-on-ones, and have a regular discussion about performance throughout the year instead of just as at a one-off time. Better performance begins there.

# Takeaways

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- Skip surveillance: Focus on results, and truly trust your employees.
- Hold consistent one-on-one meetings – it's recommended to do so once a week, and for 30 minutes to one hour.
- For performance reviews, incorporate them as lightweight check-ins at multiple points in the year, instead of relying on one, giant review once a year.

## Put this into practice with **Know Your Team**:

- Use our One-on-Ones tool to have consistent one-on-one meetings with your team, with agenda templates, suggested questions, and a place to write shared takeaways.

# Onboarding and Training in a Remote Team

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What to keep in mind when onboarding and training new hires in a remote team.



# It's daunting.

When you're not in the same physical place, you can imagine how someone new joining your team might feel. You need to find a way to make sure everyone can feel well-equipped and confident to contribute to the team, without being with someone in-person. It's a challenge. After all, the numbers on how likely it is for a new employee, regardless of where they are located, to leave within the first 90 days are astounding: 30% employees leave before their first three months are up, according to a [survey with 1,500 people](#).

As a result, it's imperative to give new hires the exposure, resources and support they need to be successful – particularly when remote. To do this, remote managers often focus on having a strong, hands-on onboarding process. In fact, according to our survey, 69% of remote managers said they had a formal onboarding process, while only 59% of in-person managers who said they had a formal onboarding process.

From the insights of 1,000+ managers in our online leadership community, [The Watercooler](#) in [Know Your Team](#), I noticed clear commonalities for what leaders view as best practices for how to onboard a new hire. Interestingly, when I re-viewed these best practices, they don't necessarily only apply to remote teams – they equally are relevant and applicable to in-person teams too. Here were the most frequently cited elements of their employee onboarding processes:

- **Mentorship** – At many companies, new hires are usually paired with the lead as a mentor (or a more senior person). Oftentimes, this is a formal buddy or mentorship program. For remote teams in particular buddy programs seem to occur with greater frequency than in co-located teams: According to our survey, 51% of remote managers said they have a mentorship program or “buddy system” as opposed to 41% of in-person managers who answered the same way. An example of a company that does this

is Help Scout: They give the new hire a buddy or a new “[work best friend](#)” on their first day of work.

- **Partially in-person onboarding** – Because bringing a new employee up to speed can be tricky, some remote companies will partially onboard their team members in person. When we first brought on my business partner and CTO Daniel Lopes, here at Know Your Team, that's what we did – we worked together in-person in Chicago for about a week or two. Wade of Zapier, similarly explains how they onboard new hires by bringing them to the same location as their managers for a period of time. He calls it “[AirBnOnboarding](#)”: “AirBnOnboarding, which when we hire folks within the first month, we actually do like to have them spend a week in person out here in the Bay Area. So we'll rent an Airbnb, we'll bring their manager out here, them out here and then spend a week working alongside them.”
- **Weekly one-on-ones** – During the first month, the new hire often has weekly one-on-ones with the lead/mentor (and a couple with the CEO as well) via video chat. After the first month, the one-on-ones slow down to a more moderate pace, such as biweekly or once a month. Below are some of the questions that I asked Mandy, one of our new hires who is remote (she lives in Pennsylvania):
  - Personal connection
    - How's life?
    - What are you excited about lately?
    - Anything have you worried or down lately?
  - Issues:
    - When have you felt frustrated in your first 2 weeks here?



- What feels unclear? (E.g., Do you feel you have enough context about the company?)
- How clear is “success” for you for the next 3 months, the next 6 months, and next year?
- Are there any decisions you’re hung up on?
- Observations about the team and/or company culture?
- Feedback:
  - Would you like more or less feedback on your work?
  - Would you like more or less direction from me?
  - How is the workload?
  - What aspect of your job you would like more help or coaching?
  - What about my management style can I improve?
- Career direction:
  - If you could be proud of one accomplishment between now and next year, what would it be?
  - What’s one thing we could do today to help you with your long term goals?
- **Nailing the basics** – Many remote companies have thorough, rigorous documentation that explains processes and details like getting their computer all configured. For example, the company MeetEdgar has an elaborate employee handbook where all their processes in the company from vacation to communication are outlined. For our new hire at Know Your Team, I wrote “Welcome note” that I include in its entirety below.

- **A clear first project** – One recommendation is to design what the first month of the new hire will look like for the project(s) they’ll tackle. What will they be responsible for, and what’s the ideal outcome? You want to have something to help the person get acquainted with the company, but also have the feeling of accomplishment at the same time. (I also did this for our new hire.)

## What I did for our employee onboarding process

Something new happened recently: We hired a new employee at Know Your Team – and it caused me to rethink our entire employee onboarding process. As a small, profit-focused team, we don’t hire often. As a result, this time around, I wanted to be intentional about how to onboard a new hire.

Given the consensus around these recommendations on how to onboard a new hire, I incorporated these elements into our own employee onboarding process. However, I also knew from our research through Know Your Team over the past 5 years with 15,000+ people, that as a leader, it would be crucial to provide our new hire with (1) as much context as possible about the business itself (2) direction as to what “success” looks like (3) encouragement in carrying out the role, and (4) a sense of rapport and trust so that we can work well together.

As a result, on our new hire’s very first day at Know Your Team, I sent her an Ice-breaker through our software (it’s a set of fun questions that help break the ice).

I also wrote up a “Day 1 Welcome Note” and sent it to her. We’re a remote company, so we default to written, asynchronous communication – but I also wanted something in writing she could refer back to, if needed.

Here’s what the “Day 1 Welcome Note” included...

**Why we hired you** – When you tell someone why you hired them, you're essentially saying to them: "I believe in you." Few forms of encouragement are better. You show your support for them on Day 1, and simultaneously set your expectations for the things you want them to continue doing. Not to mention, I've always found it strange when you join a new company, and you're not exactly sure why they picked you.

**Context write-ups** – "What are all the things someone new has no clue about, but would love to know?" I asked myself that question, and then wrote up a series of documents that attempted to answer it as much as possible. The result was separate documents on our company's history, our purpose + vision + values, how we work (communication, meetings, etc.), business context (market analysis, product vision, etc.), and the key milestones we're looking to hit in the upcoming six to eighteen months.

**Work preferences survey** – Annoyances, pet peeves, proclivities, and communication tendencies... I wanted our new hire to have an opportunity to share all those things about how she prefers to work. And I wanted her to know what everyone else on the team's work preferences were, too. And so I wrote up a survey with 23 questions:

- Where on the spectrum of an extrovert to an introvert would you place yourself?
- What's your preferred way to receive feedback, in terms of format?
- What's your preferred way to receive feedback, in terms of speed?
- What's your orientation toward conflict?
- What time of day are you most productive?
- How would you describe your communication style?
- What motivates you the most?

- Who is your hero? Why?
- What do you value, more than anything else?
- What do you consider your "superpower"?
- Who's been the best coworker / team you've worked with? Why?
- Who's been the best boss / mentor you've ever had? Why?
- When have you worked with someone and noticed it not going well?
- How do you tend to organize your work day?
- How do you tend to organize your week?
- What do you think you're more sensitive about, compared to others?
- What do you tend to have a longer learning curve around, compared to others?
- What do you tend to pick up very quickly, compared to others?
- What's your biggest work-related pet peeves (i.e., that thing other people do that totally annoys you when you work with them)?
- What does "work life balance" mean to you?
- What would others who've worked with you say are your greatest strengths?
- What would others who've worked with you say are your greatest weaknesses?
- Anything you'd like to share about what makes for your ideal work environment?

After she filled out the survey, I then shared with her everyone else's responses – and I made sure when I filled it out that I didn't look at her responses either, as a means to not be swayed in any way.

**Definition of success and potential projects** – As suggested by the Water-cooler members on how to onboard a new hire, I outlined what a solid first project would be, along with potential projects for the next 6 months. I also took a first stab at defining what I saw as “success” for her role, with the intention of discussing and riffing on it with her during our first one-on-one meeting later that day.

**My personal to-dos for onboarding her successfully** – I wanted our new hire to know what I still had yet to do to make sure she was onboarded fully (e.g., making sure she had access to all our software tools, walking her through our back-end administrative system). That way, she'd be looped in the process, and not in the dark about when we'd get to a certain topic.

### **The exact “Day 1 Welcome Note” I sent our new hire**

What'd this end up looking like, all together? Here's the exact welcome note I sent our most recent new hire, Mandy, our Operations Manager:

*Happy first day, Mandy.*

*We are over the moon to have you join us. Today marks the first day of a great adventure together. I'm so honored to get to work with you.*

*First things first, I wanted to share why we hired you... In the most simple terms: I was impressed while working with you. Ever since we began working together on the podcast, it became obvious to me that you produce excellent work. We highly value the ability to just execute, and I noticed your ability to do that immediately. You have a keen eye for detail*

*(so important in your role!), adjusting things based on feedback – and you very quickly grasped our brand. Those are not easy things to do, so that really stood out to me.*

*You also receive feedback wonderfully: Openly, objectively, and non-defensively. In fact, you communicate in a very level, clear way, which Daniel and I also highly value.*

*And, in all our conversations, you exhibit incredible perseverance and rigor. I see a builder in you: You've built something awesome with DevReps – and I know the potential for you to build even more is 100% there. And so, I jumped at the chance to bring you on full-time!*

*And now, we're here – and I feel lucky. Working with someone of your caliber is what makes building KYT a meaningful journey for me, personally.*

*Alrighty, let's get to the good stuff – getting you all situated in KYT!*

*To give you full business context, I've added you to all our Basecamp Projects. I recommend going through each one – reading some of the messages, poking around in the documents to get a sense of everything. In particular, here are some documents to give you the most context of the business:*

- *KYT History [LINK]*
- *KYT Purpose, Vision, Values [LINK]*
- *How We Work [LINK]*
- *KYT Business Context [LINK]*

- *Key Milestones [LINK]*

*I definitely don't expect you to absorb it all in a day – let alone in a single week (or even a month!). It takes a while to feel really comfortable with our brand, business problem, audience, etc.*

*I'd also love to get a sense of your work style + preferences. When you get a moment, could you fill out this little questionnaire here? [LINK]. Once you respond, I'll share mine and Daniel's answers too.*

*I also took the liberty of a first stab at potential objectives + projects for our first 6 months of working together (see below).*

*This is 100% a draft that needs your input, heavily, so let's discuss during our call later today. [LINK]*

*For reference, here's a little to-do list for me of some of the more tactical stuff we need to cover + knock out during your onboarding. [LINK]*

*Last thing I want to mention: We want your fresh eyes. If there's something you notice that's weird, or you wonder why we do it that way – please tell us. It's just been the two of us for the past two years, and so there's likely many things that seem strange or things that can be a ton better. Your observations on those things will be so helpful.*

*Whew! Okay, I think that's it for now. Please let me know what questions you have. Take your time going through it all – so looking forward to chatting later today. And, again, welcome!*

I'm sure as we hire more folks, this process will change – and I look forward to getting feedback from Mandy herself, one of our new hires, on what she

thought could've been better. Though, you'll notice: There's an emphasis on mentorship, on documentation, and on providing as much context as possible.

In the meantime, I hope pulling back the curtain how I've thought about how to onboard a new hire is helpful for you in thinking about your employee onboarding process in a remote team.

## Takeaways

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- Have mentorship or a buddy system – 51% of remote managers said they have a mentorship program or “buddy system.”
- Consider partially onboarding the person in-person.
- Hold weekly one-on-ones for at least the first month.
- Nail the basics – share institutional knowledge, communication processes, etc. from Day 1.
- Have a clear first project for your new hire to execute on.

### Put this into practice with **Know Your Team**:

- Kick off our **Icebreaker** feature to support your onboarding process – it asks five fun questions every time you add someone new to Know Your Team.

# Hiring, Compensation, Benefits in a Remote Team

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**Here's how to think about what to hire for, exactly how to hire, and what fair compensation + benefits look like in a remote team.**



# Remote work is not for everyone.

Some people don't enjoy not being in the same physical location as their co-workers. And some people, quite frankly, aren't very good at it. Because of this, a big part of working well in a remote team well is making sure you are choosing people for whom remote work will work well for, in the first place.

This includes figuring out, yes, first who exactly to hire and what to hire for. But it also includes executing well on how you hire, how you choose to compensate those folks fairly, and how you think about providing benefits in a remote team.

Based on numerous remote companies who've hired folks successfully (and unsuccessfully) over the years, data from our remote work survey, and insights from 1,000+ managers in our online leadership community in [Know Your Team](#), [The Watercooler](#), here are the most important factors to consider as a remote manager when hiring for your team:

## What to hire for in a remote employee

### Empathy.

You get a Slack message from someone making a request of you. Their tone is curt. You feel a bit put-off. Are they mad at you? Should you say something? This situation happens a million times, over and over again. When you're working remotely, there are going to be a myriad of moments where you have to either read between the lines or take things with a grain of salt. This is where empathy comes in. You want to hire folks who are aren't going to assume the worst, overreact, or take things personally in communications. They take things

in stride, and have empathy for the team in terms of why someone might be communicating in a certain way. Wade of Zapier [describes](#) this necessary empathy well:

*“We like folks who have a lot of empathy and are really good, just helpful people because you're working in Slack and in text all day. You need to be able to empathize when maybe a sentence doesn't come off quite right, or whatever, you'd be like, oh, I trust that they had good intentions here, this wasn't meant to be, you know, harsh to me or whatever right. Those are important values that we have that lend themselves well to remote environments.”*

### Manager of one.

In the book, [Rework](#), the Basecamp founders Jason Fried and David Heinemeier Hansson, they discuss how the ideal employee is one who manages themselves. This could not be more true of remote employees in particular. In their guide to remote work, Zapier [talks](#) about how the “propensity toward action” and ability to prioritize are key traits to look for in a remote employee. Help Scout similarly [extols](#) how “self-starters” tend to make the best remote employees. And Doist has [written](#) how “when everyone on the team is remote, it's vital to hire proactive, curious people who won't wait for a specific set of instructions.”

### Excellent writing skills.

As we've discussed, writing well is essential to being a good remote manager. But it's also paramount for remote employees too. With most of communication happening in a remote team that's written – be it Slack messages, emails, etc. – “if someone struggles to write clearly and concisely, they'll struggle in a remote team,” as [stated](#) by Zapier, a remote company with 200+ people. Doist

in fact emphasizes a written cover letter as one way to filter and zoom in for people with excellent writing skills.

### **Prior experience in a remote team is preferred.**

One observation that many experienced remote managers will share is how they historically have had difficulty hiring more junior people in a remote team. This is because junior people tend to require greater mentorship — mentorship that is more easily accessible when in person. They also don't have a lot of experience, if at all, with remote work and tend not to be as proficient of writers or modes or reading emotional tone. Now this isn't to say you should never hire more junior folks. It's just to bear to mind that onboarding and strong training should be emphasized and likely more focus will need to be applied, versus than when hiring junior co-located employees.

## **How to for hire remote employees**

### **Zoom in on real work.**

There's nothing like knowing if someone can work well remotely as looking at someone's work, itself. Many remote companies will do this, whether it's an "audition" like at Auttomatic, or paying candidates for one or two weeks of a consulting project as they do at Basecamp. At Know Your Team, when we hired Mandy, we worked with her part-time, remotely, and compensated her as such at an hourly rate as a consultant for about two months before we decided to work full-time with her. When you zoom in on the real work instead of the resume, you focus on what matters: The work itself.

### **Assume more time.**

I recently interviewed Nick Francis, CEO and co-founder of Help Scout, about how he thinks about hiring at his remote company and he admitted a very interesting insight to me: He'd noticed how when you're hiring in-person, it's all about moving quickly. You hear from someone via email, they'll get interviewed over the course of the next few days, and oftentimes, an offer is either made on the spot or at the end of the week. In a remote setting, that timeline is extended. You may actually spend weeks sourcing candidates, and then months interviewing them and doing a trial period with them. It's different. For example, here are the hiring processes and timelines share by Buffer, Doist, Gitlab, Zapier, and Automatic.

### **Examine the writing.**

With writing being so important to working well remotely as we discussed in Chapter 2, it's no wonder that hiring folks who are strong writers are key. It'll show immediately, as you begin to work with the person. The numerous chat messages, write-ups, and emails will accrue — and you'll want those communications to be as clear and crisp as possible. Basecamp strongly discusses how when two candidates are equally qualified, they always hire the better writer.

### **Advertise in the places that people look.**

Where do you advertise roles and source candidates specifically for remote candidates? Based on input from 1,000+ members in our Watercolor community, many managers' found remote job boards to be useful — particularly We Work Remotely. (FlexJobs, and Remote.co were also mentioned). Additionally, as with co-located managers, remote managers also highly relied on their own network and promotion on their company's blog and social media. Interestingly, another means that came up was promoting the job description to your own customers. Noted one Watercooler member: "Having over 10,000 paying customers, we will just send an email out to our customer list with the new position. Just recently, we had over 50 people apply for a part-time, remote position. This

serves two benefits. (1) It shows our current customers that we work hard to find people like them who know the product (2) It helps us find high-quality candidates who identify with our company's brand and values since they were a customer first."

## How to compensate your team when you're in different locations

Fairness of compensation in different locations, with different costs of living, is something that frequently comes up for managers of remote teams. Most commonly there are two approaches to thinking about fair compensation for remote employees:

### Location agnostic.

Some companies pick one location as a base for setting a standard for what salaries should be. For example, Basecamp uses San Francisco as their base city. They look at comparative data sourced by Radford, a pay research company, and then target 95th percentile for the role and seniority. They discuss more about this practice [here](#). According to Basecamp CTO David Heinemeier Hansson, they "never felt good about paying someone less because they choose to live somewhere cheaper. That should be their gain as remote employees."

### Location sensitive.

Other companies do factor in location as part of the compensation strategy for remote employees. For them, it feels arbitrary to pick a specific city for the base rate, as a remote company. They also often factor in other lifestyle factors and

years of experience as well, into the pay scale. Buffer famously has an open, transparent salary calculator, which you can read about [here](#).

## Favorite benefits for remote employees, especially in different countries

When you're co-located in an office, it can be easier to offer team benefits and perks: Team lunches, happy hours, gym memberships etc. In a remote team, it's a bit trickier. You want to figure out, how can office perks can be enjoyed by everyone? Or does there need to be entirely different perks for remote employees all together?

Here's what Watercooler members mentioned as things they offered in their own remote teams:

- **"Happy breakfasts"** - Randomly pair remote staff who have non-work Skype call over coffee.
- **Virtual happy hour every week** - Use multi-way video conference and have a virtual happy hour every Friday early evening, with everyone's favorite drink, whether it's tea or a martini.
- **Schedule remote employees to drive / fly in** for the weeks when you have some sort of big party or event (but don't make it expected, so the pressure isn't felt to travel if folks don't want to). Potentially even include and invite their families.
- **Consider offering food delivery for remote workers** on days you're providing catering in the office - For example, one Watercooler member held a company-wide pizza party, where she coordinated surprise pizza deliveries for everybody, and then hopped onto group video chats to show off piz-



zas and enjoy a big goofy synchronous lunch break. Another Watercooler member has a tradition of ordering sweets for people's birthdays, and for the remote person's birthday he had doughnuts delivered.

- **Offer “equivalent” benefits** - If you negotiate a gym membership near the office for employees at HQ, also offer a comparable gym membership to the remote employee.
- **Make sure to buy hardware (computer, monitors, etc) for remote employees.** While it may seem tempting to ask a remote employee to use their own equipment, there was strong consensus from remote managers in The Watercooler that you invest in getting hardware for your remote team members to use. Wrote one Watercolor member:

*“Hiring and onboarding new team members is a big investment that we take very seriously – and the last thing we want to get in the way of success are small things like equipment. If you already purchase machines for your non-remote team members, then I especially recommend you do the same for your remote team members ... Remote employees can sometimes feel like second-class citizens if they see that they receive different treatment from co-located employees, and this can have a negative impact on culture.”*

While not wholly different from hiring in-person, hiring remotely is different. I'm hoping these references and words of advice can serve as a starting point as you decide for your team who and what makes the best fit, given the environment you want to create.

## Takeaways

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- Hire for empathy, the ability to manage themselves, excellent writing skills, and (preferably) prior experience in a remote team.
- During the hiring process, zoom in on real work, assume it'll take more time than you think, and examine people's writing skills.
- To promote the job, consider advertising on remote job boards, asking folks in your network, and also advertising the job to current customers.
- Ensure fair compensation for your team – this can be either location agnostic or location sensitive.
- Consider having perks and benefits that “mirror” what you'd have for your co-located, in-office employees.

### Put this into practice with **Know Your Team**:

- Once you've hired your new employee, use our [Icebreaker](#) feature to kickstart your onboarding process – it asks five fun questions every time you add someone new to Know Your Team.

# Managing Up, When Remote

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**Four best practices to help you work well with your boss when you don't see them face-to-face all the time.**



# “What does her Slack message really mean?”

It's easy to second-guess yourself when your boss pings you. You want to have a good relationship with your boss — but it's not always the most natural of things. And that difficulty only increases when you're working remotely.

When you don't see your boss face-to-face all the time, the room for miscommunication, misinterpretation, and misalignment expands. You can't read body language. You can't go tap your boss on the shoulder to ask a question. You can't even show her with your physical presence that you are, yes indeed, working.

Yet maintaining a good relationship with your boss is crucial. According to [Gallup](#), “managers account for at least 70% variance in employee engagement scores.” You're less stressed when things are going well with your boss — so you want to be particularly thoughtful about managing that relationship while you're remote.

The good news is that this is a common scenario faced by 1,000+ managers in [The Watercooler](#), our online community for leaders from all over the world in [Know Your Team](#). Based on their conversations, I've pulled a few tips on how to maintain a good relationship with a manager while working remotely...

## Proactively share progress.

For your manager, understanding what progress you are making on your work is surprisingly opaque. Your manager is often juggling quite a few tasks — be it working with a client or negotiating a partnership — and they want to know what you're working on ideally without having to hover, check-in with you constantly, and be all “Big Brother” about it. As emphasized by leaders in [The Watercooler](#), this desire to know what you're working on is only heightened when you're remote.

To help shine a light on this for your manager, proactively share as much detailed progress as you can. This can come in the form of writing up a bit more granularly in your bullet points in your weekly summary about the project. Or it can come in the form of you even volunteering that you send her a daily summary of what you accomplished that day. Helping your manager understand the results you're achieving brings them a ton of ease and peace of mind to their job.

## Play detective about their working style.

Working well with someone has a lot to do with understanding how they like to work. What are their preferences and habits? What's the way they're used to having things done? As a remote employee, not seeing your manager face-to-face, it's very easy to unintentionally annoy your manager or do something that isn't within their zone of what they'd prefer. When you know their working style, you can better calibrate from afar how to communicate with them, work with them, and deliver above and beyond what they expect.

To get a sense of their working style, here are some questions you can ask them:

- What do you value most in a coworker?
- Who in the organization do you admire, and why?
- Do you like time to think something over, or do you prefer to talk about it right away?
- When do you not like to be interrupted during the day?
- Are you a morning, afternoon, or a night person?
- Is there anything you feel like you might be a little more particular about than most?
- What, if anything, worries you or keeps you up at night about the company?

Try asking one (or more) of these questions during your next one-on-one conversation, when your manager asks you, “Do you have any questions for me?”

## Rigorously clarify expectations.

Arguably the most challenging part of any working relationship — regardless of if you’re remote or not — is to get on the same page in terms of expectations. Do you know what is expected of you, and does your boss know what is expected of her? Often times, when you’re both in-person, these expectations can be hashed out over time: You listen, observe, learn, ask others around you, and pick them up. But when you’re remote, because of limited in-person interactions, those conversations might not come up as readily. Accordingly, it’s im-

perative for you to ask questions that clarify, uncover, and confirm what these expectations are.

Here are some questions you can ask your boss to start to clarify these expectations:

- What things will I need have accomplished this year for you to view me in this role as “successful”?
- What does quality work look like to you?
- What should standard working hours be for both of us?
- What is the best way to contact you during those hours?
- What form of communication should be used to communicate with you during that time?
- What’s the expectation of how quickly I should respond when you reach out to me during those working hours?
- What form of communication do you prefer when there’s a hard topic or conversation? (E.g., In writing, over the phone, video call)
- If I need your attention on something urgent, what form of communication do you prefer? (E.g., Slack, an email, a phone call)
- What do you consider “urgent” versus “not urgent”?
- If I have any feedback for you, how would they prefer you receive it: In writing, over the phone, or during a video call?
- If I have a suggestion about something, how would you prefer you receive it: In writing, over the phone, or during a video call?

- If I have questions, what form of communication should I pose the questions to you? (E.g., In writing, over the phone, during a video call)

## Make time to get to know them — in person or over video.

When you work in the same physical location as your boss, the opportunities to build trust and rapport are plenty. You can chat with them over lunch and ask them about their hobbies, or go grab coffee in the afternoon and catch up on what's been going on in their life recently. Even bumping into them in the hallway of the office and giving a friendly "hello" fosters a sense of affinity between the two of you. When you're remote, those moments of social interaction no longer exist. For managers who are working with remote employees for the first time, this is often a shocking and noticeably absent part of a boss-employee relationship.

In the Watercooler, leaders had some recommendations to make sure you're still getting to know your manager on a personal level (feel free to suggest them as ideas to implement with your manager):

- If you happen to live near your manager, try quarterly in-person lunches.
- Once a month or once a quarter, have coffee over video for 30 minutes to an hour to chat about life. (Here are some [icebreaker questions](#) if you're never really sure what to talk about or what to ask your manager.)
- Video is always on for calls (unless there is a tech reason)
- Take a few minutes to catch up on life during the beginning of a one-on-one meeting.

- Twice per month, during your one-on-one meetings over video, chat about whatever they want to talk about. It usually covers a bit about work or maybe just catching up on what is happening in their lives.
- Do video chats instead of just calls. Many Watercooler members recommended this. They often ask that people turn on the video and "it makes a huge difference."

While never easy, focusing on these four areas as a remote employee can help better your relationship with your boss tremendously. If you want, you can even use this article as an excuse to start the conversation and perhaps try a few of these ideas. (For example, you could send an email saying: "I read this interesting article about working well remotely, and thought we might want to try turning on video more often instead of just doing phone calls...")

These tips have worked for our Watercooler members — I hope they work for you too.

# Takeaways

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- Proactively share progress with your boss.
- During your next one-on-one, ask questions that reveal their work preferences and working style.
- Rigorously clarify expectations by asking questions like, “What does quality work look like to you?”
- Make time to get to know them over video (or even in-person, if possible).

## Put this into practice with **Know Your Team**:

- Use our Heartbeat tool to update your boss on what you’re working on and proactively share progress with them.

# Transitions: What to know and do before becoming a remote leader

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Are you about to become a remote leader? Here are 7 things you'll need to think about and do.



# Recently, I was asked, “Claire, what advice do you have for a leader who’s transitioning to a remote team?”

I had to think about that question for a while. After all, it’s been a while since I’ve personally transitioned from running a remote team – I’ve run Know Your Team as a remote company for the past six years.

However, in posing the question to our 1,000+ members in the Watercolor in [Know Your Team](#) and pulling data from the survey we conducted amongst almost 300 remote managers and employees, there were definitely key themes of “There are things you should definitely know about before making the leap to managing a remote team.”

Whether you’ve been assigned to a new remote team, are joining a remote company, or have some new remote direct reports joining your team, here are the most pressing things to keep in mind and pitfalls to avoid as you transition to becoming a remote leader...

## Commit, don’t dip a toe in.

You can’t half-ass running a remote team. I’ve noticed this in watching other CEOs try to transition their team into becoming a remote team... They only let a select few people work remotely, or they don’t make writing things up a priority, or they don’t make what’s going on in the company accessible to their remote team members. That doesn’t cut it. The remote folks get treated like second-class citizens. Over at Help Scout, their CEO Nick Francis says exactly this when talking about their remote culture of 60+ employees world-wide:

*“A friend and investor in our company, David Cancel, once told me that you have to choose remote culture or office culture and stick to it, because there is no in between... Trying to optimize for both will likely result in remote employees feeling like second-class citizens.”*

Similarly, Help Scout’s Head of People Ops, Becca Van Nederynen, shared that, “You can’t dip your toe into remote work, it requires 100% commitment.”

At Know Your Team, we live this maxim daily. Even though Daniel, my business partner, and I are both located in San Francisco, we communicate with one another as though we don’t live in the same city: We talk via chat and Zoom for a majority of our communication. That way our other team members who are not in San Francisco aren’t left out of the loop.

If you feel you can’t be as “all in” as you’d like as a remote manager (for example, your team is composed of a mixture of both remote and in-person employees), consider a “if one person is remote everyone is remote” rule for meeting. One Watercooler member mentioned this, writing: “If all the people in the meeting are at the same office, sure, go ahead, take a room to talk. If even one person is somewhere else, open a conference call, and everyone grab their headset and join. Don’t have everyone in a room and just the one poor guy or gal on the call. This helps everyone feel the remote pain (if any), and make the meeting go on an equal footing. I was a bit hard to start, but it pushed us in making a lot of progress quickly.”

## Focus on setting up basic processes and tools immediately.



“If your team today relies heavily on meetings and interrupting each other to get stuff done,” one Watercooler member wrote, “Switching to remote will be a nightmare.” As a result, it’s paramount to initially focus on setting up some foundational processes, guidelines, and tooling so your team doesn’t feel lost.

For example: If somebody has a question, do people know where to ask? Does your team think they need to be watching Slack all day long to stay up-to-date? If someone completes a task, do they know where to go to find new work to do? How do people communicate their progress with each other and outside their teams? How can ideas turn into projects, and where can people see that happening?

For more best practices on how to set up processes in a remote team as a manager, be sure to read [Chapter 3](#).

Keep in mind that it takes time to get to the right process. You’ll likely have to change, adjust, change, and adjust again as your team and your company grows and shrinks over time. However, formalizing these processes give you and your team the foundation to figure out what will work in the first place.

Consider too, that you want these processes to not be a burden. Your team shouldn’t have to rack their brains trying to memorize them, and they shouldn’t have to be checking a document on “How to work” constantly (and they definitely should not be penalized in any way for not following them).

At the end of the day, these processes are iterative. Together, you’ll figure out what works best.

## Over-communicate almost everything.

As discussed in [Chapter 2](#), communication is only made more important in a remote team, when you can’t see each other face-to-face. This means that it’s your job as the leader to set the example and communicate often and clearly to set the tone in the team. How is the team communicating what’s going on? How is the team communicating decisions? How is the team communicating challenges and big wins? How is the team communicating gratitude? Reflect on how you’re creating opportunities, systems, and channels where folks can both receive and participate in these communications.

This extends in particular to communicating work hours and work progress. The best remote teams tend to constantly communicate what they are doing, where they are, when they will stop working, when they are online and available, etc. That sets the right expectations and makes things much smoother.

If you are switching to being a remote manager, one Watercooler member suggested “a small cheat-sheet with remote communication best practices with things like:

- If you are going to be offline to take care of some personal things during the day, please notify your direct team on their Slack channel
- If you are planning to work at odd hours schedule for a few days please let everybody know up-front.”

## Emphasize training and onboarding — especially for junior employees.

When you’re new to a remote team, you’re in for a challenge. That’s why it’s important to invest in onboarding and training new hires well. You can read more about onboarding remote employees well in [Chapter 7](#). You may also need to prepare for the fact that for new junior employees in particular, there may be

more of a ramp up period that's greater than in-person. Wrote one Watercolor member, who reflected on his experience: "In my experience, it's much harder to coach an intern or a junior person that needs a lot of guidance in a remote environment than in-person. I never actually had a good experience, but it might be possible with today's technologies. But I think this is something that you have to be aware and plan for."

## Focus on building trust.

According to our survey, what most managers overlook is building trust and fostering rapport in their team (25% of people said this). It's easy to, given all the other things you feel like you might need to get in place first (e.g., communication processes, tools, etc.). And it can also feel non-obvious of exactly how. Set up some standard means of building trust. This can be via video chats that you schedule to talk about something fun once a month or establishing a non-work-related specific chat channel. Whatever it may be, being intentional as a leader and putting focus toward building trust will help you avoid being one of the remote managers who think to themselves, "Oh man, I really should have paid more attention to how we build trust in the team."

To get a full sense of what exact ways you can build trust as a remote leader, be sure to read [Chapter 4](#).

## Not everyone likes to be remote – be ready to adjust accordingly.

It's easy to assume that when you become a remote manager that everyone will enjoy working remotely. This is not the case at all. As one Watercolor member

remarked: "One of my favorite people to work with doesn't like being remote. He likes being surrounded by people, going out for lunch with the team on a daily basis, etc." So, how do you account for this? The Watercolor member suggested: "You can try to address that by having off sites/gatherings a few times a year, having remote social sessions (like a happy hour via hangout) and cover coworking space." And yet even with those mechanisms in place, some people still might not enjoy being remote – and so it's important to be cognizant of this. Be sure to ask questions actively in one-on-one meetings to find out if the environment is working for them... and if not, what exactly you can do.

## If you're making the switch, explain why are you going remote.

Oftentimes, as a new remote manager, your company is making the switch to becoming remote – and it confuses the hell out of people. Your team then makes assumptions about why certain folks are remote, but not others, or don't understand the reasoning behind the move in the first place. The result is some of the team feeling like "second-class citizens"... and eventually the parts of the company that are remote versus non-remote actually can develop different cultures. The latter is actually not necessarily a bad thing, but sometimes is an unintentional and negative by-product of the fact that you haven't made the reasoning behind the move to remote work clear. Don't assume everyone knows. Your smooth transition as a remote manager depends on it.

Naturally, these suggestions don't cover every single scenario, nor will they all apply to your exact specific situation. Though, as you make this transition, consider trying at least a few – especially establishing processes and building trust. The effort will make a difference in your transition.

# Takeaways

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- If you're thinking about going remote, commit – don't dip a toe in.
- Focus on setting up basic processes and tools immediately.
- Over-communicate almost everything.
- Emphasize training and onboarding – especially for junior employees.
- Focus on building trust.
- Not everyone likes to be remote – be ready to adjust accordingly.
- If you're making the switch, explain why are you going remote.

## Put this into practice with **Know Your Team**:

- Know Your Team can help you make the transition to a remote team: You can get feedback with our Culture Questions, ask fun Social Questions, and get updated on what everyone is working by way of our Heartbeats – all without disrupting them via chat or calling an all-team meeting.

# Setting Employees Up for Success in a Remote Environment

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# 10

The 6 things to give your team a “heads up” before working remotely to ensure their success.

## A team member of yours is about to become remote for the first time.

Or, you've just taken over for a team with a few folks who are going remote for the first time.

You're wondering: How do I set up my team for success in a remote environment?

You want your employees to feel prepared, confident, and ready to execute. Here are six things you can do to make sure they start off on the right foot.

## Let people know that remote work is different – there is a learning curve.

You don't just start naturally doing remote work and become good at it. There are specific habits and skills you have to pick up. And that takes time. These expectations are important to calibrate because many assume remote work is just doing the thing: You work and you're no longer in the office. Warn them that it might feel weird to not have a clear "start" and "end" to their day, or in-person watercolor chit-chat with their co-workers. Let them know that if things do start to feel "off" to mention it to you. Establishing a steep learning curve as the norm, not the exception, will help your team members who are new to remote work not feel discouraged in the beginning – and for them to internalize that with entering a new system of work, they'll need to adapt and adopt a new system of work.

## Raise flags where pitfalls are, so they avoid stepping in them.

If folks aren't careful, it's easy to fall subject to the pitfalls of remote work. Here are the key ones to make clear to your team:

- Overworking is easy if you don't have a clear end point to your day, or find yourself continuing to check email incessantly over weekend.
- Loneliness can become a real issue if you're not cognizant of your own needs to connect with your team members.
- Miscommunication can be rampant if it's not made clear how much empathy plays a role into not taking a particular chat personally, or if someone doesn't know the systems of written communication.
- A lack of deep work / constant interruption can occur if the person doesn't absorb the communication processes that you've set up as a manager. You can read more about the specific communication best practices for remote teams in [Chapter 2](#).

## Coach them on what to lean into.

In addition to things you want your team you avoid, there are things as a manager that you want your team to \*lean into more\*. Particularly:

- Over-communication rarely feels like over-communication. The more you both proactively share progress, the more you can make sure you're both on the same page. This way, small problems will get resolved sooner and won't bubble up into something bigger.

- Lead with empathy. Not sure what someone meant by their note? Assume positive intent. Feeling bothered with the way someone communicated their request? Kindly share the feedback of what you observed and how you'd like things to be different next time. Don't assume that the person will change their behavior, or know that you have certain preferences.

## Build trust and rapport.

When asked, “What do you think is the most important thing a remote manager can do to prepare their direct reports for success?” to almost 300 remote managers and employees, the #1 thing that they said was to “build trust and rapport across the team” (24% of remote managers and employees said this.) This should come as little surprise given how important social connection is in teams, to begin with, as discussed in [Chapter 4](#). This means as a manager, making sure you're prioritizing the different ways of connecting with your team beyond just the “work stuff.” Do you have regular video calls where your team can just chat about non-work related stuff? Do you have a dedicated chat channel where folks can have jokes shared, and small talk about their weekend? Make sure you're investing in building connection in your team, as a way to set them up for success.

## Make expectations for work results clear.

One of the best ways to set your team up for success is making sure they know the exact definition for “success” to begin with. Without clear expectations for what success is, your team isn't going to know if they're on track, off track... or anywhere in between. Make sure you've clarified these questions:

- What does success look like? How will we know we will have been successful?
- What does “good enough” look like?
- What does “high quality” look like?
- What are things I tend to be particular about that others might not?
- How does this project tie into the bigger vision we're trying to make real?

You can also read more about setting clear expectations for managing performance in [Chapter 5](#).

## Schedule regular one-on-ones.

You can't make expectations clear, and you can't invest in connecting with your team, if you don't create the space and time to have these conversations. This is where one-on-one meetings come in. Of course, as a remote team, you'll need to have these via video – but whatever you do, actually do them and don't skip them. As described in [Chapter 5](#), most remote managers tend to hold one-on-ones with greater frequency than managers who are co-located. This is valuable time to line up on what could be better, how the person is feeling adjusting to being remote, and what you can be doing as a leader to support them.

Help your team ease into being remote. Give them every reason to be successful by providing the support you know as a manager is your role to do. These six things will help.

# Takeaways

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- Let people know that remote work is different – there is a learning curve.
- Raise flags around overworking, loneliness, miscommunication, and a lack of deep work to help your team avoid these pitfalls.
- Coach your team to lean into over-communication and empathy.
- Build trust and rapport – 24% of remote managers and employees said it was the #1 thing you can do to prepare your direct reports for success.
- Make expectations for work clear by asking questions like, “How will we both know we will have been successful?”
- Schedule regular one-on-one meetings to help calibrate the transition to a remote environment.

## Put this into practice with **Know Your Team**:

- Use our Social Questions feature to build trust and rapport and help ease new employees into a remote environment.
- Use our One-on-Ones tool to have consistent one-on-one meetings with your team, with agenda templates, suggested questions, and a place to write shared takeaways, so you can make sure your team members are adjusting well to a remote environment.

# Getting the Rest of Your Organization Onboard with Working Remotely

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Is your leadership team not sold on remote work? Here are 6 recommendations for getting their buy-in.





## What do you do when the rest of your leadership team is not sold on remote work?

Or, if you're the only team that's remote in a co-located company?

These situations can be tricky, as you either are stuck in a way of working that isn't most conducive to you and your team. You feel like you're being held back.

While there's no silver bullet, and of course, the path will be different depending on the situation, here are a few recommendations for ways to think about getting the rest of your company on board with remote work.

## Answer the elephant in the room.

"How do I tell if they're working?" Whether or not your leadership team tells you what's behind their hesitancy around remote work, this is likely one of the primary forces. Naturally, people are concerned that productivity and output will decrease if people can't be productive. Maybe if people aren't in person in an office, they'll be spending their time on other things. Or if they are working, can you really get the same quality of engagement and interaction if people are remote? You can address this question head on by sharing statistics, such as: In Buffer's 2019 [State of Remote Work](#), 99% of respondents want to work remotely at least part of the time for the rest of their careers, and another 2019 survey found that 64% of employees work remotely at least part of the time and that [67% would quit if their workplace became less flexible](#). In fact, in our own survey of almost 300 remote managers and employees, 43% of remote managers and employees believe that being remote positively affects their perform-

ance, and 65% of remote managers and employees say that being remote positively affects their job satisfaction.

## Play detective out the other hang ups.

Figure out what else is holding your leadership team back from wanting to make the jump to being remote. Are they unsure what tools and process should be in place? Are they concerned about how it will affect culture? Acknowledge that these are important and valid questions – and then share your version of the answer to them. Share the tools and process discussed in [Chapter 3](#) and how that could be adapted and fit to model what processes and tools you already have in place. The most crucial thing is that you let these hangups keep hanging. Address them.

## Make the case for output, hiring, and retention.

You don't want to just assert defense against the negative perception of remote work. You want to assert the positives. Why are you so keen on remote work? It's not that you want an excuse to work in your pajamas (and even if that were a reason, that's not necessarily bad, if it doesn't detract from performance). Share how supporting flexibility and autonomy that employees want helps with retaining folks – and with hiring. You open up the pool for who you can actually have work at the company if you can hire from anywhere. And lastly, you can also argue how because remote work requires a bit more emphasis on communication and process, this in fact creates a work environment that encourages and is ripe for higher output.

## **Forcing function for systemizing things.**

At the very least, what remote work does require for it to be successful is for there to be clear processes and systems in place. In a way, it becomes a forcing function for the things you already should be doing in a remote company. For example, one-on-one meetings are absolutely critical in a remote team – and it's something teams should be doing regardless of whether or not they're remote. But when you are remote, you can't afford not to hold one-on-one meetings. The set-up begs for it. This is the same for acting with empathy and writing out and documenting communications. These are “good things to do” in co-located teams, but “must dos” in remote teams. By becoming remote, you in essence, force your team to adopt practices that will be most beneficial for it in the long-run.

## **Be transparent with your experience – describe both pros and cons.**

One of the most effective ways to convince the rest of your team to go remote is to be honest with your personal experience with it. What have been the upsides and downfalls? What have previous teams that you've worked on with gotten right... and wrong? What should the leadership team be conscious of if they were to decide to transition the rest of the company to be remote? This honesty will show them that you're trying to put forward all parts of the story -- not just one. And, the information itself will help them actually prepare the team in the best way and put it in the best position for success, if it did decide to go remote.

## **Be proactive with process.**

If your team is already remote: Show, don't just tell. Show the processes that you have in place, how you collaborate, how you have one-on-one meetings. Show how you share decisions and resolve conflict. Proof is in the past experience and success of what you've been doing as a remote manager. If you don't have this proof, write-up what you would do if your team was remote – and why. It's always more believable if you can help your leadership see it's believability.

Start the conversation here. Be forthcoming with examples from other companies and your own team. And always keep the bigger picture in mind: Remote work, when done right, can help everyone work better, together.

That's what everyone – including your leadership team – wants, after all.

# Takeaways

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- Address the elephant in the room that your leadership team may be concerned with productivity if they were to become a remote company.
- Figure out what the other hang-ups are around process, culture, etc.
- Make the case for output, hiring, and retention.
- Share how going remote can be a positive forcing function for systemizing your team's processes.
- Pull back the curtain on your own experience with remote work – both the pros and cons.
- Show how you've already made remote work successful, within your own team, or at another company.

## Put this into practice with Know Your Team:

- Point to Know Your Team as a tool that can help support you as a remote team: You can get feedback with our Culture Questions, ask fun Social Questions, and get updated on what everyone is working by way of our Heartbeats – all without having to be in-person or to call an all-team meeting.

# What'd Ya Think? + Thanks for Reading!



## What'd ya think?

I'd love to hear YOUR personal experience with managing remote teams. Please drop me a line at [claire@knowyourteam.com](mailto:claire@knowyourteam.com) to share your own stories and insights of what's worked, what's not. I'll happily add it to this guide, which I am constantly updating :-)

## A few other resources for you might find helpful:

- **Know Your Team** - Our tools help remote managers hold effective one-on-one meetings, build rapport in their teams, get honest feedback, and share status updates. If you're a new remote manager, it's an essential way to save you a bunch of time 'n stress.
- **Other Guides in Know Your Team** - If you enjoyed this, you'll enjoy our other written guides on topics including Getting Honest Feedback, Building Trust, the Fundamentals of Leadership, One-on-One Meetings, and more. You get access to them when you upgrade to the full version of Know Your Team.
- **Know Your Team Blog** - Read our pieces on leadership, management, company culture, and more.
- **The Heartbeat Newsletter** - Every few weeks, I interview a leader I respect and share a handful of leadership reads I've found interesting.