SOCIAL ENTERPRISE ACADEMY

LEADING REMOTELY
Workbook

Leading remotely can be complicated. Keeping teams connected, motivated and productive can be a challenge, but leading remotely also presents opportunities to increase delegation and create self leading teams.

Learning Outcomes:

- Explore the challenges of both working remotely and leading remote teams
- Assess the leadership style(s) and competencies required of you to lead your remote team, in the context of a complex and fast changing environment
- Analyse the role of trust within remote team leadership and actively build trust at all levels
- Establish communication protocols to enable your remote team to communicate effectively
- Build a committed and motivated remote team, whose performance is based and measured on results
- Appreciate the needs of individual team members, delegate responsibilities effectively and manage individual performance
- Assess which digital tools will best support team collaboration and project management
- Draw up an action plan for how you will continue to develop your leadership within a remote work environment

We don't have to do all of it alone. We were never meant to."
Brené Brown

FELLOW LEARNERS ON THIS PROGRAMME

Name	Organisation	Contact

PROGRAMME JOURNEY

Pre-programme Preparation & Introduction

Pre-programme preparation	Introduction session on Zoom

Module 1

Self-directed learning activities	Facilitator-led learning on Zoom

Module 2

Self-directed learning activities	Facilitator-led learning on Zoom

Reflection & Action Planning

Programme reflections	Action planning

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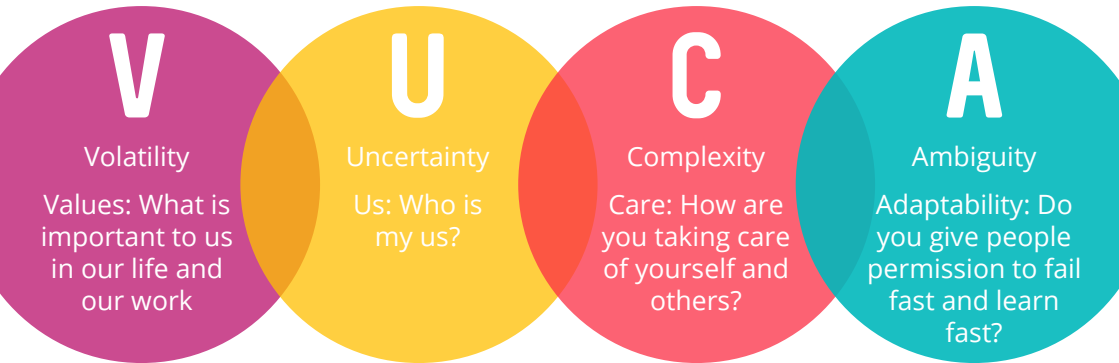
Module 2

Reflection & Action Planning

PROGRAMME PREPARATION & PRE-WORK ACTIVITIES

ACTIVITY 1: LEADING IN A VUCA WORLD

Read the VUCA handout and the 'What critical qualities do leaders need in this VUCA world' blog.

Leading in a VUCA world is extremely challenging. The previous reality has changed. As leaders there are a set of questions we must be asking ourselves to ensure we are reacting in the right way. The answers to some of these questions might be clearer than others. In which case we need to develop a plan for finding the answers.

V
Volatility

Values: What is important to us in our life and our work

U
Uncertainty

Us: Who is my us?

C
Complexity

Care: How are you taking care of yourself and others?

A
Ambiguity

Adaptability: Do you give people permission to fail fast and learn fast?

Reflect on these critical questions that leaders in a VUCA world must ask themselves.

How are these questions relevant when leading remotely

ACTIVITY 1: LEADING IN A VUCA WORLD

'Reflect on how this is now relevant to all our lives. Think about the four elements of 'Volatility/Values, Uncertainty/Us, Complexity/Care & Ambiguity/Adaptability' which are explored in the blog. Which speak most to your own situation?

Record below how you would like to see any or all of these evidenced in:
Yourself

Your organisation

ACTIVITY 2: RESPONSE TO REMOTE WORKING

There are multidimensional consequences of the current global pandemic, many of which will be long-lasting and far-reaching. One of those consequences has been that the majority of people around the world have had to transition towards home-working, resulting in the exponential growth of virtual teams. Such teams can be defined as those separated by a distance and engaging digitally.

In order to fully understand and implement the kind of leadership remote workers and teams need, it's important to first reflect on how it feels to be a remote worker.
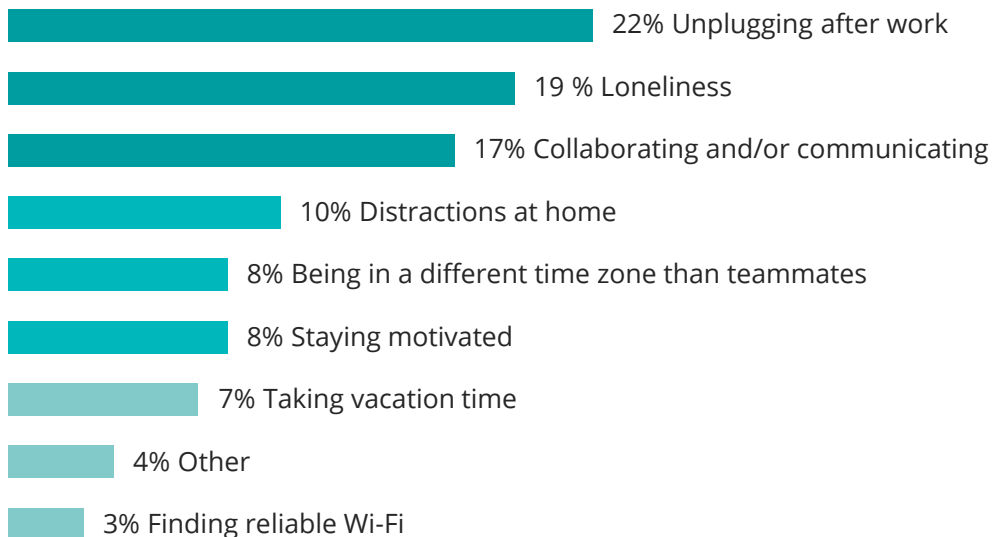
Reflect on your own experience of working remotely. What have you enjoyed and what have been your biggest challenges?

What I've enjoyed	My biggest challenges

ACTIVITY 2: RESPONSE TO REMOTE WORKING

In 2019, a study was undertaken on the 'state of remote work' where the following challenges were identified.

What's your biggest struggle with working remotely?

22% Unplugging after work

19 % Loneliness

17% Collaborating and/or communicating

10% Distractions at home

8% Being in a different time zone than teammates

8% Staying motivated

7% Taking vacation time

4% Other

3% Finding reliable Wi-Fi

State of Remote Report / 2019, buffer.com/state-of-remote-2019

Are any of these similar to the ones you identified? This study took place before the Covid19 pandemic. Are there any specific challenges that you have identified that relate specifically to this context?

ACTIVITY 2: RESPONSE TO REMOTE WORKING

Before the first live session, ask your team members (or a selection of them if you have a large team) what they have enjoyed and their biggest challenges, and note the range of answers in the table below:

What team members have enjoyed	Team members' biggest challenges

ACTIVITY 2: RESPONSE TO REMOTE WORKING

Reflect on the list of things they've enjoyed. Are there things you can do to ensure these continue and are maximised?

Review the Challenges list. Consider which ones you are able to influence or address in some way. Identify 2 or 3 that you would like to prioritise learning new skills and tools for, in order to support and get the best out of your team.

ACTIVITY 3: REFLECTING LEADING REMOTELY

Like any attribute, leading remote teams is a learned skill, developed first through awareness and then through understanding and practice.

In your own experience of leading a remote team so far, what have been the highlights?

What challenges have you noticed and are still wrestling with?

What challenges have you noticed and overcome?

ACTIVITY 3: REFLECTING LEADING REMOTELY

Read the blog written by Academy Facilitator and social entrepreneur, Gavin Weale , based in South Africa about his experiences of transitioning towards remote leadership.

Which elements of this blog can you relate to?

Write down 3 objectives of taking part in this programme on remote leadership. What do you want to be able to differently by the end of the programme?

1.

2.

3.

INTRODUCTION TO LEADING REMOTELY

Live Session Notes

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MODULE 1
Learning Activities

ACTIVITY 4: CRITICAL SUCCESS FACTORS FOR VIRTUAL TEAMS

Virtual teams are those separated by a distance and engaging digitally. In this section we will explore the critical success factors for virtual teams, and how to ensure healthy team development and progress.

Read the article 'Virtual Project teams'

Reflect on the importance of 'trust' and how this might relate to 'values' in the VUCA Blog. Note that we will be exploring trust in more detail later in this programme.

When looking at what remote teams need, Bruce Tuckman's model of team development can be a helpful lens. Even if you are a fairly mature team, you may find you have to begin the cycle of team development again when moving from a familiar structure and environment (i.e. co-location or partial co-location), to a new situation (everyone working remotely). Teams often revert to storming, before re-norming, then performing. The re-norming process can require virtual teams to be very explicit about how they will operate virtually, including the development of team 'rules of engagement' that focus mainly on communication norms. We will explore this in more detail later.

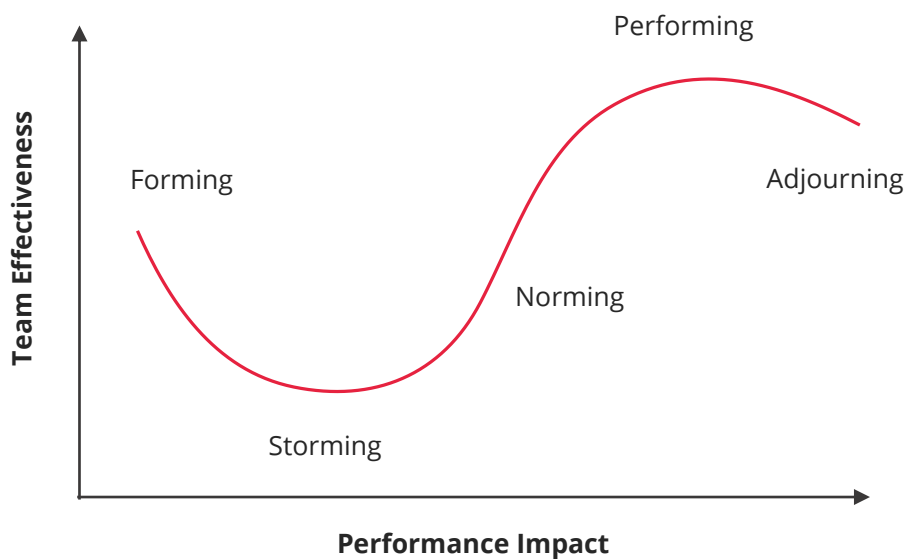# ACTIVITY 4: CRITICAL SUCCESS FACTORS FOR VIRTUAL TEAMS

If you are not already familiar with Tuckman's model of team development read this handout.

" **The ability for a group of people to do remarkable things hinges on how well those people can pull together as a team."** Simon Sinek

Think about how this relates to your team since converting to a virtual team. Which stage is your team at now?

Highlight on the below graph where you are now as a team.

Performing

Forming

Adjourning

Norming

Storming

Team Effectiveness

Performance Impact

ACTIVITY 4: CRITICAL SUCCESS FACTORS FOR VIRTUAL TEAMS

Using the graph, now identify some practical actions you can take to support the team to move along the graph. Consider these in the three areas of 'people', purpose' and 'links'

People	Purpose	Links

ACTIVITY 5: LEADERSHIP STYLES

Leading remote teams is not necessarily about completely changing your leadership style. Leading remote teams requires you to amplify your leadership, bringing greater clarity and consciousness to how you lead.

You may already be familiar with your preferred leadership style(s). There are many different frameworks you can consider to help you to identify which leadership style(s) you use. **For this activity, thinking specifically about your leadership style(s) you have been using since your team has started remote working.**

1. Complete the Goleman Leadership Styles questionnaire. If you have completed this questionnaire before it will be interesting to see what has changed (if anything) now that your team is remote.

2. Take a few moments to reflect on your preferred style(s), both from completing the questionnaire and reading the handout.

How do you think your leadership style might need to change when leading remotely?

3. Consider what your team need from you right now. Most likely you will have team members with very different – and changing – current circumstances and needs. The ability to adapt your leadership style to get the most from your team in the here and now is critical for your collective success.

What could you stop, start and continue doing as a result of thinking more about your leadership style?

## STOP

START

CONTINUE

ACTIVITY 6: COMMUNICATION

Effective communication skills, both formal and informal, are the lifeblood of relationships in the remote world.

Communication methods are either:

Synchronous	Asynchronous
(interactions which happen on a real-time basis). These include phone conversations, videoconferencing and online call.	(where information is exchanged at each participant's convenience rather than at the same time). These include e-mail, voicemail, many of the digital collaboration tools, e.g. Slack or Microsoft teams.

When dealing remotely there is increased possibility that the communication cycle will break down. There are not as many opportunities for seeking clarity, and it is easy to make assumptions about what the other is saying, especially when using written, rather than spoken communication methods.

- Words
- Voice, tone, modulation, pauses...
- body movements, face, arms...
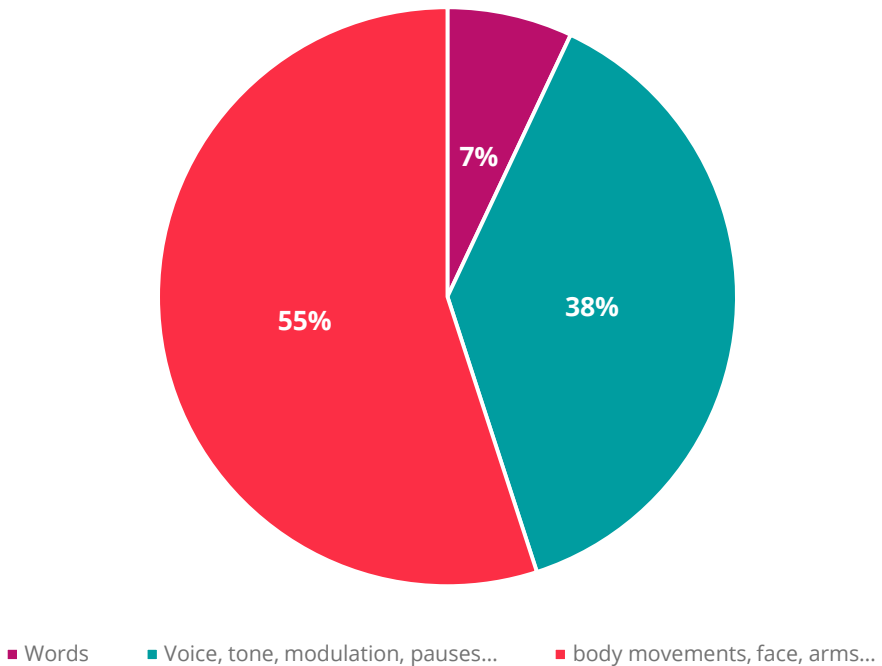
It's relevant to refer back to Albert Mehrabain's work on communication here. While undertaking research on how people communicate about emotions and feelings, he established that only 7% of communication takes place through the words we use, while 38% takes place through tone and voice and the remaining 55% of communication takes place through the body language we use. While it's important to note that Mehrabain was specifically referring to emotional content and therefore we cannot attribute the same split to every conversation and every topic, it's clear that a significant amount of what we mean to say is missed where there are no visual clues to our communication.

ACTIVITY 6: COMMUNICATION

1 Think of a time when there has been a breakdown in communication when working as a remote team. What went wrong and what was the impact?

2 Watch the '**How to Collaborate Effectively If Your Team Is Remote**' video about collaboration and communication within virtual teams and read the article about **collaborating effectively if your team is remote.**

3 Identify at least 3 ways you can improve communication within your virtual team. Consider both synchronous and asynchronous communications methods in your plan.

Much of the research on remote teams identify one of the critical success factors to be clarity around the 'rules of engagement'. Remote work becomes more efficient and satisfying when leaders agree the expectations for the frequency, means and ideal timing of communication for their teams. One of the major challenges can occur when team members (or leaders) expect instant responses and constant availability, as that disallows for concentrated thinking time without interruption. After the live session, you will have an opportunity to agree these 'rules of engagement' with your team, if you haven't already done so.

ACTIVITY 7: BUILDING TRUST

Trust is one of the vital components of any type of team leadership and teamwork, but comes sharply into focus when working with remote teams. There has to be trust at all levels. Trust is established in working relationships through reliability, consistency, integrity, and familiarity. It is particularly vital that virtual team members establish trust in relationships with colleagues and managers since distance and the absence of day-to-day interactions creates pressure that can erode the fragile bonds of trust.

▶ **Watch the 'Building trust' video**

What resonates with you from this video about your own situation in terms of how to build trust within the remote team you lead?

ACTIVITY 7: BUILDING TRUST

Read the '10 ways to build trust in remote teams' article.

As leaders of remote teams we need to activate and demonstrate trust-building behaviour more visibly than in co-located teams. In each of the categories from the handout, identify 3 actions you will take in order to actively build trust:
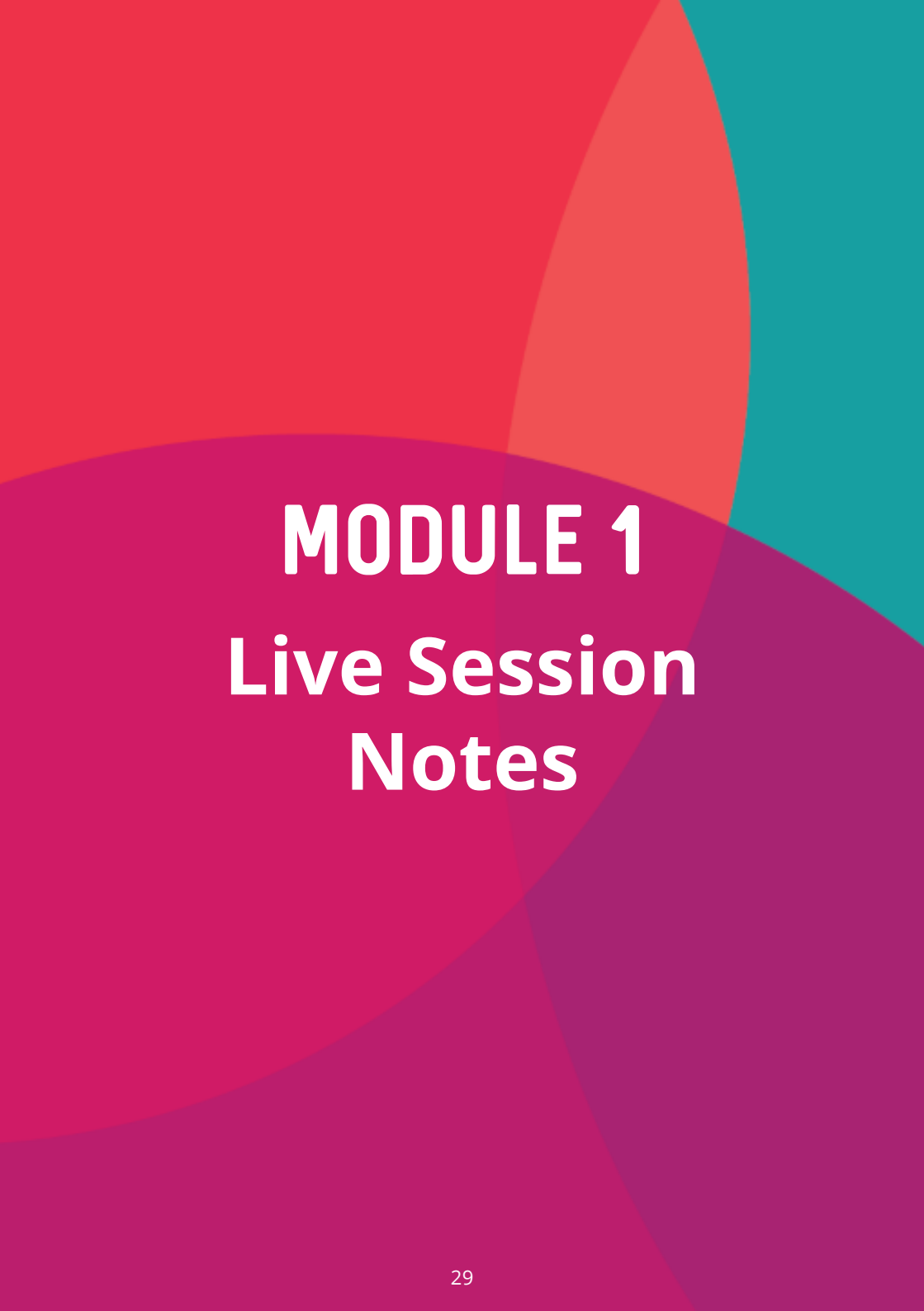
1 Trust between your team and your organisation

2 Trust between your team and you, its leader

3 Trust between team members

MODULE 1
Live Session Notes

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MODULE 2

Learning Activities

REFLECTION

Reflect on the module 1 live session.

What were your:

Eye openers

Things you would like to find out more about
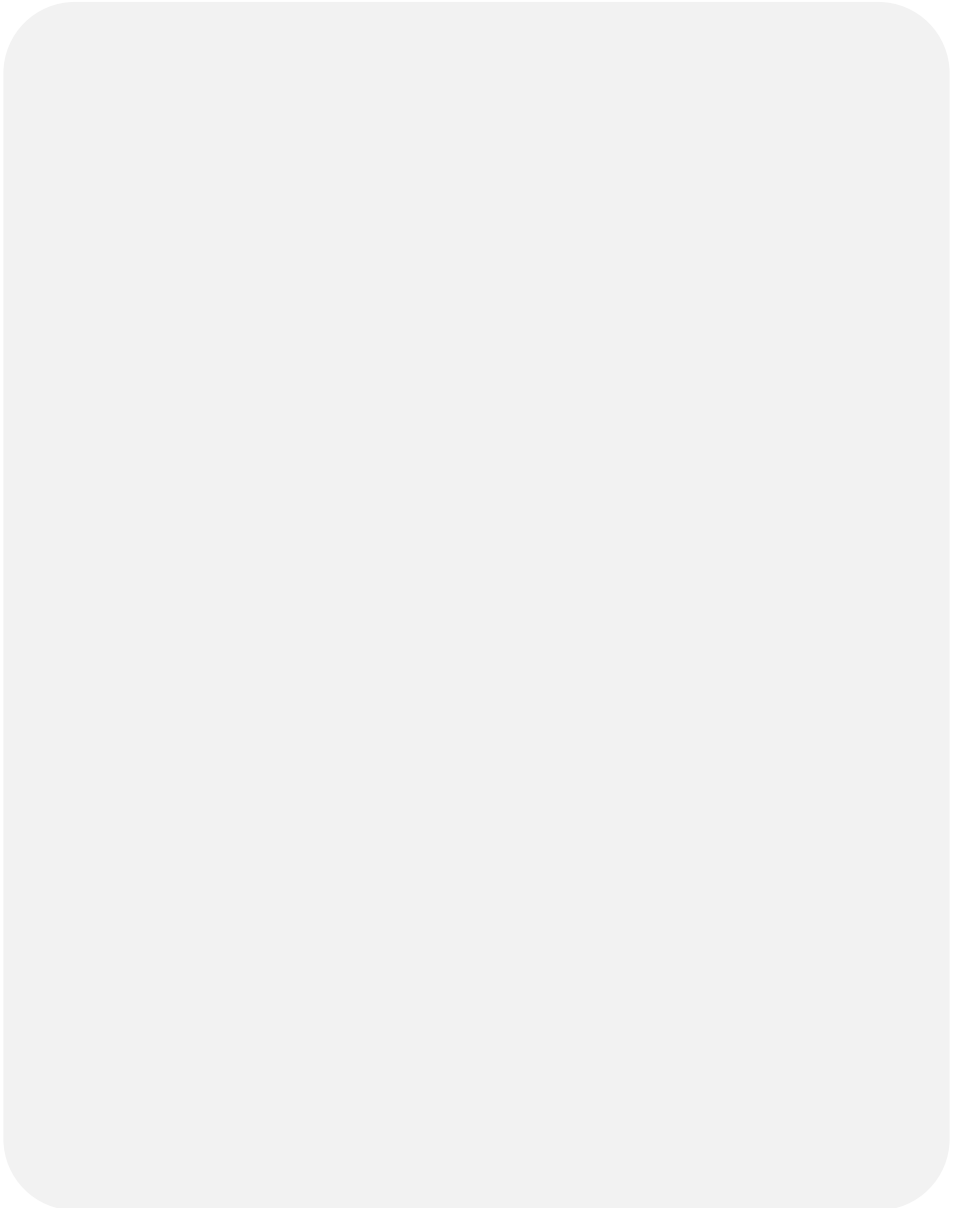
Questions you still have

ACTIVITY 8: ESTABLISHING COMMUNICATION RULES OF ENGAGEMENT

One of the invitations to you, on completion of the live session is to agree your Communication 'Rules of Engagement' with the team, if you don't already have these in place.

Consider carefully how you will go about this, as well as what you want to achieve. Which leadership style(s) are most appropriate? How will you position the need for these and what will suit your organisational culture? Write down some preparation notes relating to the communication areas you need to think about as a team.

ACTIVITY 8: ESTABLISHING COMMUNICATION RULES OF ENGAGEMENT

You can capture your Communication 'Rules of Engagement' here:

ACTIVITY 8: ESTABLISHING COMMUNICATION RULES OF ENGAGEMENT

Once you have created these agreements, notice how these are implemented over the next week, and come back to this exercise.

What changes have happened in the team's communication as a result of the new 'Rules of Engagement'?

How easy or difficult has it been to stick to them?

Are there other areas of team working that will benefit from increased clarity, in addition to these Rules of Engagement you have agreed?

ACTIVITY 9: BUILDING AND MAINTAINING A MOTIVATED AND COMMITTED TEAM

In this activity we are inviting you to reflect on your time working remotely, exploring the highs, lows and everything in between. Think back to the start of when you were working remotely to today. Print the graph below or hand-draw your own graph on a piece of paper, to chart your highs and lows over time. Feel free to add in symbols, doodles and comments along the way.

from start of remote working   **today**
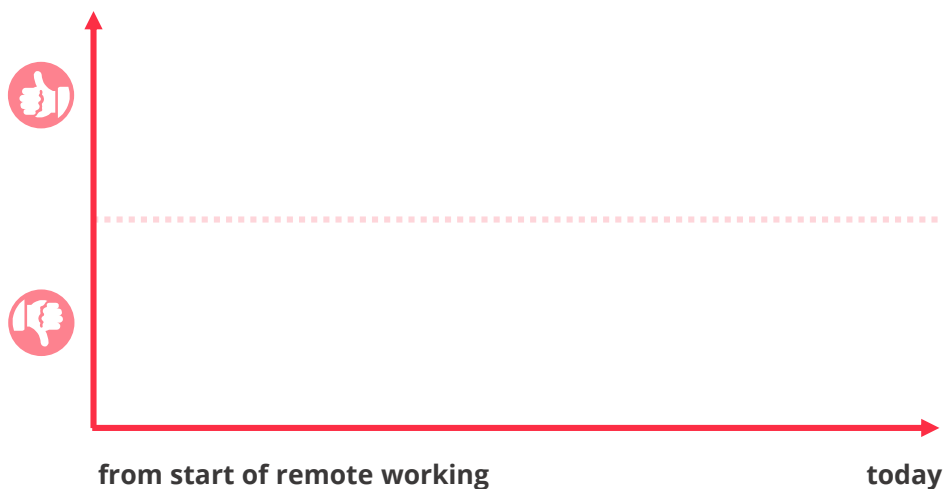
- At every turn in the line - what changes did you experience in your motivation?

- What impact did your actions have on making this happen? What did you do in the different situations?

- In what way did other people influence what happened? What did other people do to help or hinder your motivation?

- What are key learnings and takeaways from looking at your entire journey? What have you learnt about yourself and your motivation?

ACTIVITY 9: BUILDING AND MAINTAINING A MOTIVATED AND COMMITTED TEAM

Note in the table below, summarise the factors that have motivated and demotivated you in this time.

Motivating factors	Demotivating factors

ACTIVITY 9: MOTIVATION THEORIES

There are numerous motivation theories and frameworks. Below is a summary of a few. Read the 'Motivation Theories Carousel' document for a further summary of key theories that relate to what motivates people at work.

Maslow's Hierarchy of Needs

SELF ACTUALISATION
Personal growth and fullfilment

ESTEEM NEEDS
Achievment, status, responsibility

BELONGING AND LOVE NEEDS
Family, affection, relationships, work group,etc

SAFETY NEEDS
Protection, security, order, law, limits, stability,etc

BIOLOGICAL AND PHYSIOLOGICAL NEEDS
Basic life needs - air, food, drink, shelter, warmth, sex, sleep, etc
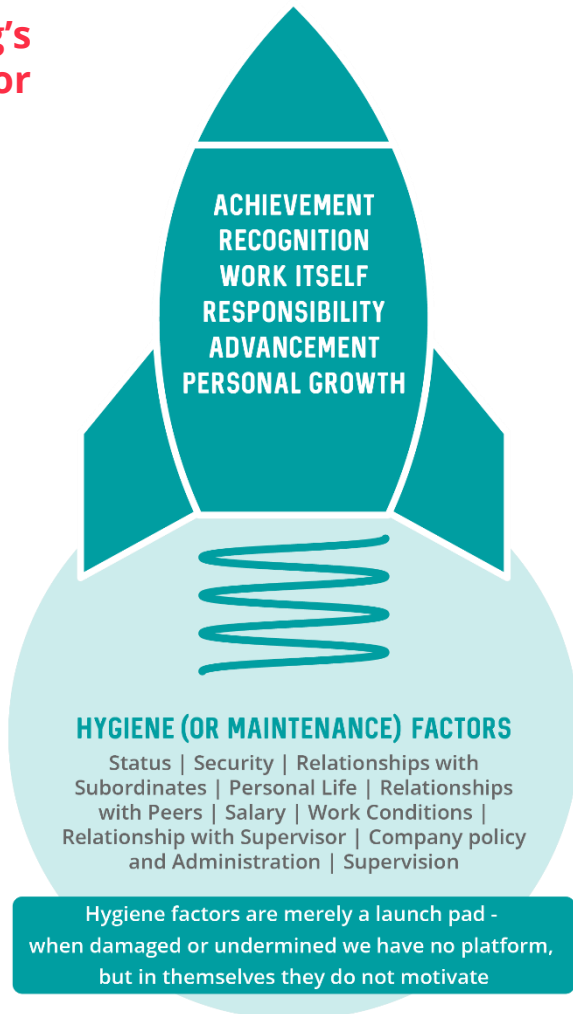
> **Herzberg's research demonstrated that people will strive to achieve "hygiene" needs because they are unhappy without them, but once satisfied the effect soon wears off - satisfaction is only temporary.**

Herzberg's two-factor theory

ACHIEVEMENT
RECOGNITION
WORK ITSELF
RESPONSIBILITY
ADVANCEMENT
PERSONAL GROWTH

HYGIENE (OR MAINTENANCE) FACTORS

Status | Security | Relationships with Subordinates | Personal Life | Relationships with Peers | Salary | Work Conditions | Relationship with Supervisor | Company policy and Administration | Supervision

Hygiene factors are merely a launch pad - when damaged or undermined we have no platform, but in themselves they do not motivate

David McClelland's Needs-Based Motivational Model

Need for Achievement	Need for Affiliation	Need for Power
To excel and succeed	To control and get things done	To control and get things done

Richie and Martin - 12 Motivational Drivers

People contact	Achievement	Recognition	Interest and Usefulness
Power and influence	Structure (workplace)	Self-development	Creativity
Physical conditions	Variety and change	Relationships	Money and tangible rewards

Dan Pink's elements of intrinsic motivation

Purpose – the yearning   to do what we do in the service of something larger than ourselves

Better performance and personal satisfaction!

Autonomy – the desire to direct our own lives

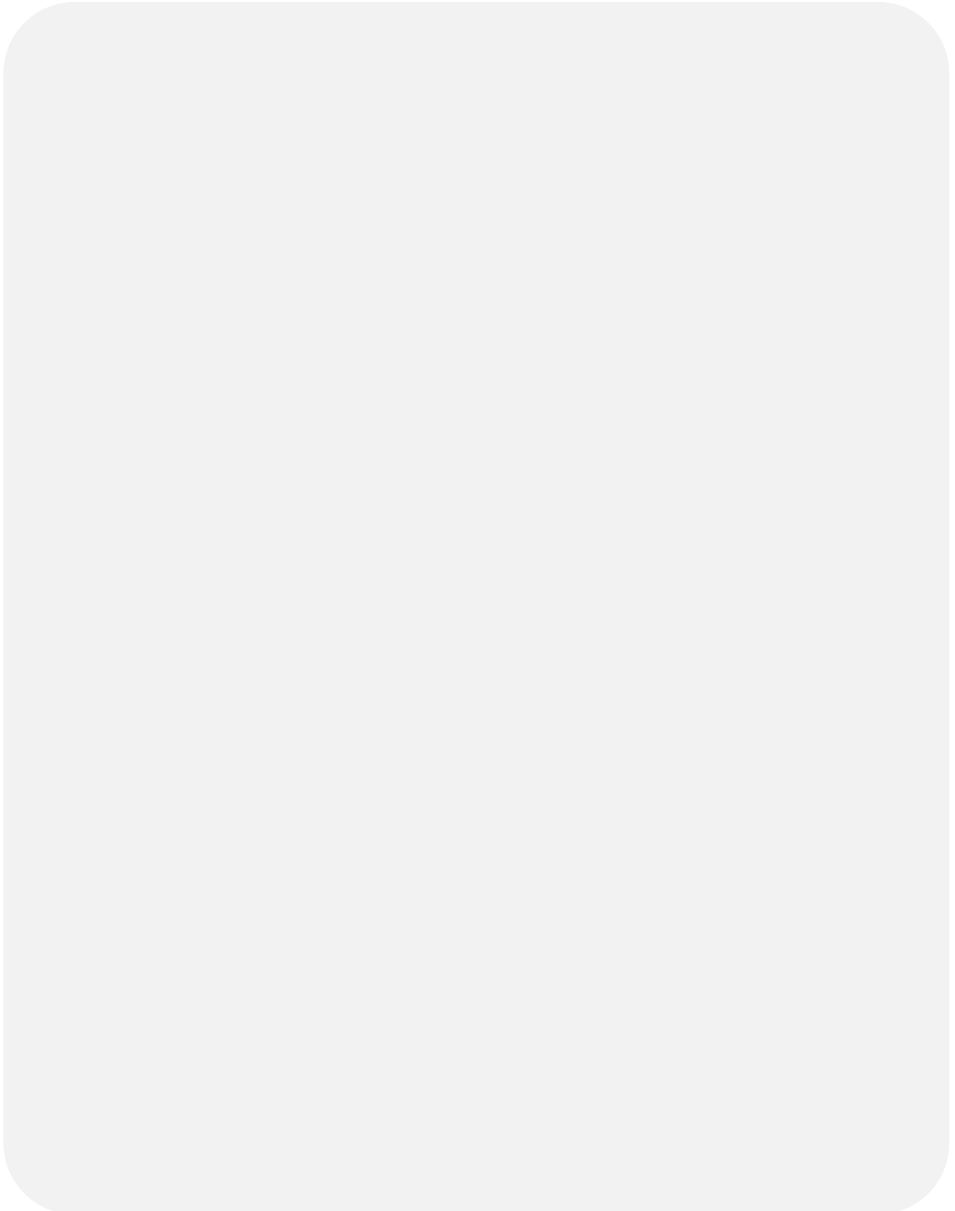**Mastery** – the urge to make progress and get better at something that matters

Take one or two of these that you most resonate with and read more in the Motivation Theories Carousel document. Think about how you can build in motivational factors specifically when working with remote teams. Some additional thoughts may be triggered by the article on meeting Maslow's Hierarchy of Needs for remote workers.

ACTIVITY 9: BUILDING AND MAINTAINING A MOTIVATED AND COMMITTED TEAM

What priorities has this identified for you in terms of how you build a motivational remote working environment? What actions will you now take?

ACTIVITY 10: SUPPORTING AND DEVELOPING OTHERS

Develop a strategy for leading individuals in Virtual Teams

Now we have an understanding for what makes for an effective and successful virtual team, we can think about how to get the most out of individuals in a virtual team. The remote leader's approach will need to be specific for each individual. This is no different to a non-virtual team, however in virtual teams it's even more important to be proactive and adaptable in your approach.

Review your own experience of leading individuals in a virtual team. How has your approach differed from how you have led co-located teams?
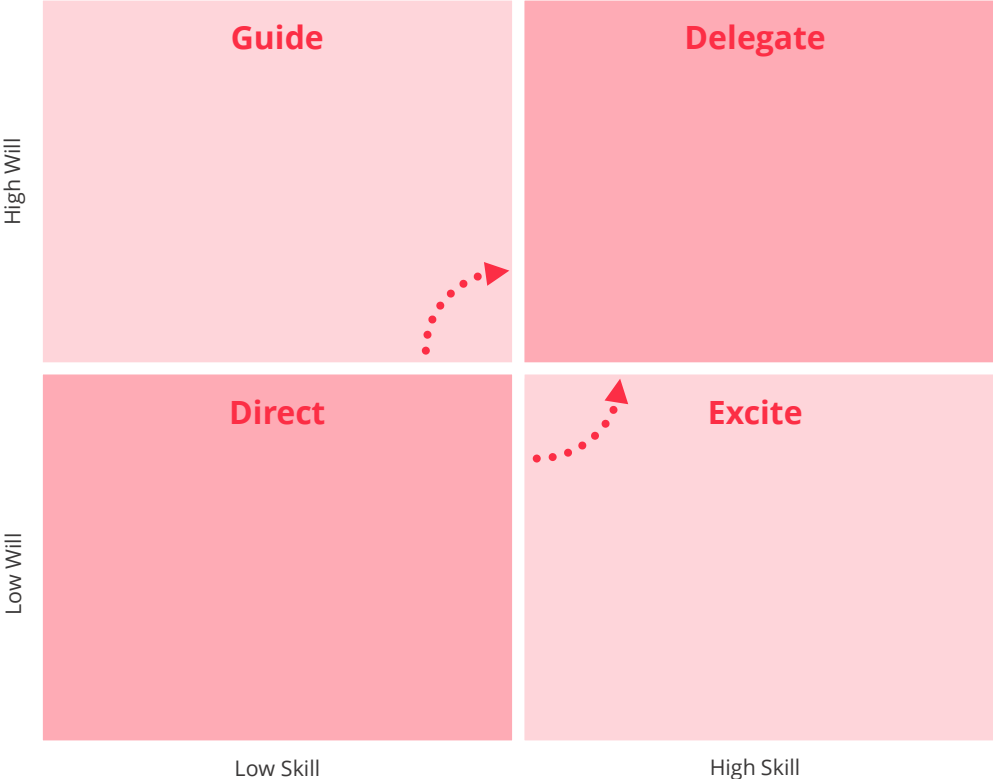
Read the handout on Managing the Performance of Remote Teams.

Individual team members need different things, at different times. The 'Skill Will Matrix' can help us to identify the approach we need to take in order to get the most of each individual, making best use of their skills and abilities.

Looking at the Skill Will Matrix plot members of your team according to their current level of motivation and ability.

With reference to the handout on Managing Performance of Remote Teams, pick 2 or 3 team members who are at different places on the matrix. Identify some practical strategies for how you can get the best from each team member, when delegating tasks and responsibilities.

ACTIVITY 10: SUPPORTING AND DEVELOPING OTHERS

Pick 2 or 3 team members who are at different places on the skill/will matrix. With reference to the handout on Managing Performance of Remote Teams, identify some practical strategies for how you can get the best from each team member, when delegating tasks and responsibilities

Team members	Practical strategies

TECHNOLOGY

With so much incredible technology available to connect us, it's easier than ever to work remotely. Today's remote workers want fast, fluid, digital solutions that will enhance their communication, productivity and ultimately, their satisfaction in the workplace. There are numerous choices available, depending on the specific use required, and the budget you have available.

The most important thing is to be clear as to what purpose you need your digital solution to fulfil and choose something that is fit for purpose you. Throughout this programme we have identified some of the essential elements of remote leadership. Now is the time to do some research on how technology can best support you and the team.

> Reflect on your experience & practices in leading on-site teams. What technologies do you use and why do you use them?

TECHNOLOGY

What things are you and/or your team finding more difficult when working remotely, that you feel technology could support you with?

☐ Read the 'Remote Working – technology and tools overview' document.

☐ Identify 2 or 3 that you think would be useful for the purposes you have identified you need for your team.

☐ Do some additional research about these platforms and their suitability. Consider:
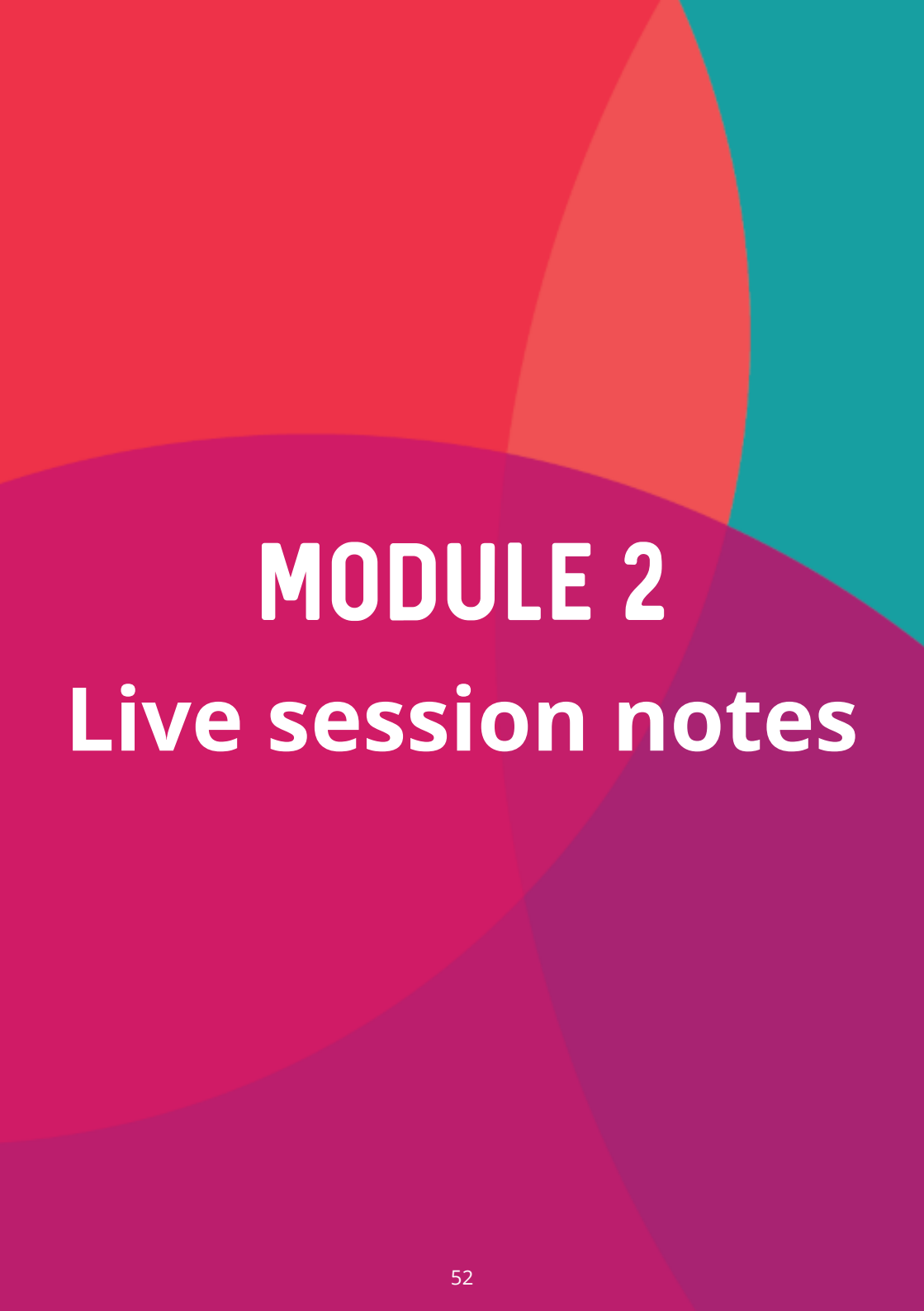
Need **Affordability** **Usability** **Availability** **Accessibility**
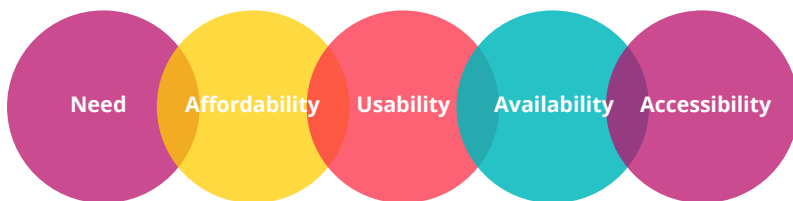
☐ Capture your research on the next page.

☐ Bring this research to the live session to briefly share with your peers.

TECHNOLOGY

Name of tool	Purpose	Advantages	Disadvantages

MODULE 2

Live session notes

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REFLECTION & ACTION PLANNING

REFLECTIONS

All learning is only useful it we reflect on it and work out how we are going to apply the learning to our own specific situation.

We encourage you to finish the module by capturing your learning and how you are going to use it to help you effectively lead remote teams.

What did I learn about myself on this programme?

What do I want to do more of / differently?

What am I interested in finding out more about?

For each of these three learning points, identify one action which has resulted, or will result from it.

REFLECTIONS

Complete the 'Leading Remotely Competencies Questionnaire' to reflect on the changes you have already put into place, and analyse how you are doing as a remote leader.

What was surprising for you in completing this questionnaire?

Which of these tips do you need to prioritise?

Which areas do you want to prioritise now in terms of the next steps in your leadership development?

Reflect back on the top tips you co-created as a group in the live session. Read and compare it with the 'Top Tips for leading remote teams' resource on the learning platform.

ACTION PLAN

Develop an action plan for how you will continue to develop your leadership. Set yourself a date to reflect on your practice as a remote leader and update your action plan.

NOTES

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The **Social Enterprise Academy** helps people to develop themselves, their teams and their organisations to create sustainable businesses and have greater social impact. Our programmes support organisations at all stages and focus on four key areas; leadership, enterprise, social impact measurement, and personal development.

Through our Social Enterprise in Education programme, we have supported over 1,000 schools across Scotland to set up pupil-led social enterprises. Since 2016, we have been replicating internationally and now have 13 hub teams around the world supporting social enterprise in their communities.

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