

This document provides some best practices for managing employees who work remotely.

## FORMALIZE A REMOTE WORKING AGREEMENT

Once remote working is arranged, the employee documents the arrangement within Workday. Here is a [job aid](#) on how to do this. When you are establishing a remote working arrangement with an employee, you should meet with the employee and document the following areas.

1. **Schedule:** It's important to agree on when the employee will begin and end their work day and the days of the week the employee will work remotely. While flexible start and stop times are possible, there should be some regularity to the employees schedule, for their own benefit as well as for those who need to contact or work with them. Determine if there are any core hours when all employees are expected to work.
2. **Contact Expectations and Methods:** Establish expectations for how frequently you intend to contact the employee and the method i.e. phone, video conference, email, messenger, etc. Also, establish your expectations for how quickly you expect them to get back to you if they miss your call or message. Here are some questions to consider when establishing these expectations:
  - How frequently do you intend to contact the employee and how will you contact them?
  - How quickly do you expect them to get back with you?
  - How can you minimize remote worker isolation through regular contact?
  - Will the employee be required to work in the office?
3. **Teamwork:** You and the employee should identify how important teamwork is to their job function. If employees need to collaborate to get their jobs done, think through and establish standards for what this collaboration should look like. Outline your expectations for collaboration with your remote workers and non-remote workers. Here are some questions to consider when establishing these expectations:
  - How do you address the need for teamwork?
  - How will you increase knowledge sharing among team members?
  - What technologies will you use?
  - How will you address conflicts that arise?
  - What are your needs and expectations for continued collaboration?
4. **Information Security:** You will need to determine if there are any information security requirements beyond what's found in statewide and agency specific policies. It may be a good idea to specifically review the types of information and documents the employee will be working with to identify all requirements and precautions the employee must take. Here are some questions to consider when establishing these expectations:
  - What types of information and documents will the employee use during the course of their work?
  - What are the security requirements for these documents and information?
  - How must the employee safeguard the information?
5. **Reporting work time and using leave:** Identify a regular schedule for your remote workers and ensure they have sufficient work to keep them busy. Make sure the employee understands the need to accurately report their work time. Establish standards for how all employees request or notify you of leave. Make sure to follow the appropriate statewide policies or applicable collective bargaining agreement.

### REGULAR CHECK-INS

Remote work becomes more efficient and satisfying when managers set expectations for the frequency, means, and ideal timing of communication for their teams. For example, “We use videoconferencing for daily check-in meetings, but we use IM when something is urgent.” Also, if you can, let your employees know the best way and time to reach you during the workday (e.g., “I tend to be more available late in the day for ad hoc phone or video conversations, but if there’s an emergency earlier in the day, send me a text.”) Finally, keep an eye on communication among team members (to the extent appropriate), to ensure they are sharing information as needed. You should establish these “rules of engagement” with all employees.

As important as setting performance expectations is, there is perhaps nothing more important than checking in with your employees on a frequent and regular basis. When employees work in the office, check ins may take place more naturally as we see the employees each day. With remote workers, on the other hand, establishing a check-in plan may be useful.

Here are some possible check-in routines you may consider that will allow you to thoughtfully establish a cadence of communication with remote working employees. They are not mutually exclusive and can be mixed and matched. A formal check-in schedule may benefit non-remote working employees as well.

Taking into account the nature of the work your remote workers are expected to perform, and the nature of the remote workers themselves, you will want to identify an appropriate check-in schedule. Here are some different types of check-in schedules.

- **Daily touch points:** Designate a daily check in time during which you and the remote worker can discuss what they are doing and any assistance they may need.
- **Weekly feedback:** Have a weekly meeting to discuss how the week went and the plans for the following week.
- **Weekly/monthly teleconferences:** To enrich your discussions with a face-to-face element, teleconference capabilities, such as Microsoft Teams or Skype, may be utilized.
- **Formal quarterly reviews:** To ensure remote workers know how they are doing it’s a good idea to consider quarterly check-ins to provide more feedback of their performance.
- **Occasional chats to nurture familiarity:** It's a great idea to take time out for occasional chats, just like you would with traditional office employees.
- **Annual or biannual face-to-face meeting:** Depending on how remote the remote worker lives, it may be mutually beneficial to have annual or biannual face-to-face meetings. A best practice is to combine any scheduled one-on-one meetings with team meetings; that way the remote worker is only traveling once.

### What Should You Talk About?

So now that you have identified strategies for checking-in with your remote workers, what should you plan to talk about? Perhaps the best way to check-in with your remote working employees is through questions.

Chances are, as you've a documented performance expectations and remote worker agreement with the employee, you've discussed goals, requirements and standards in the following areas:

- The **job's primary responsibilities** to include quantity, quality, timeliness and behavioral standards.
- The importance of **teamwork** and your expectations for communication and collaboration.
- **Compliance with statewide and agency policies** and other professional and legal standards.
- **Your expectations for communication with you** including keeping you informed of any issues, any reports required, and when and how to check in.
- **The employee's professional development** including what they want to do short-term and long-term and any feedback and assistance they need from you.
- **The projects for which the employee is responsible**, if the employee has project-based work.

### Suggested Check-In Conversation Starters

Each of the lists of questions below ends with a question something like this: "May I share with you a couple of observations I made?" This question provides a segue to giving the employee feedback after you've listened to the employee's responses to any of the questions.

#### Core Job Responsibilities

When checking in on the employee's core job responsibilities, here are some items you may want to discuss.

- Have you faced any challenges in performing your job functions?
- Do you have any questions about the expectations I have of you?
- What are you working on right now?
- What have you most recently accomplished?
- Is there anything I can do to facilitate your work?
- What do you like most about your responsibilities? What do you like least?
- May I share with you a couple of observations I've made?

#### Work Effectively as a Team Member

When discussing goals you've given the employee in relation to teamwork, here are a few questions that might be asked:

- Who have you most regularly collaborated with? In what ways?
- Which technologies do you most frequently utilize in your interactions with team mates? Are they adequate?
- Have you had any challenges in working with other members of your team?
- Is there anything I can do to help you build better relationships?
- May I share with you a couple of observations I've made?

### **Comply with Statewide and Agency Policies and Work Standards**

Use these questions to discuss policies and work standards:

- Do you have any questions about the requirements of the policies and standards?
- Are you currently experiencing any challenges in meeting the requirements specified in your performance expectations?
- May I share some "best practices" for effective remote working we've discovered?
- May I share with you a couple of observations I've made?

### **Work Effectively with your Manager**

Here are a couple of questions that might be asked in relation to how the remote worker works with you:

- Is there anything you want to make me aware of that I may not know about yet?
- How do you feel about our check-in schedule? Would you like to talk more frequently, less frequently, or is it just about right?
- May I share with you a couple of observations I've made?

### **Engage in Professional Development**

Here are some questions you might ask when conversing with a remote worker about their professional development

- How are you doing on your professional development goals?
- What are you doing right now to develop professionally? What's next?
- How can I assist you in accomplishing your goals?
- May I give you some feedback on observations I've made in relation to your career development?

### **Complete Projects in a Timely Manner**

When talking to employees about project-based assignments, here are some questions to ask:

- Can we review your project status report?
- What are you working on right now? What's next up?
- How are you doing on time lines? Are you going to be able to get it all done?
- What successes have you had with each project?
- What challenges are you facing with each project?
- What assistance do you need from me or others to complete your projects?
- May I share with you a couple of observations I've made?

### UTILIZE COMMUNICATION/COLLABORATION TECHNOLOGIES

The use of technologies can greatly enhance a manager’s ability to communicate and collaborate with remote workers. In addition, collaborative technologies are critical for supporting team work - both between remote workers and non-remote working employees, and among remote workers themselves.

Email alone is insufficient. Remote workers benefit from having a “richer” technology, such as video conferencing, that gives participants many of the visual cues that they would have if they were face-to-face. Video conferencing has many advantages, especially for smaller groups: Visual cues allow for increased “mutual knowledge” about coworkers and also help reduce the sense of isolation among teams. Video is also particularly useful for complex or sensitive conversations, as it feels more personal than written or audio-only communication.

There are other circumstances when quick collaboration is more important than visual detail. For these situations, provide mobile-enabled individual messaging functionality (like Skype, Microsoft Teams, etc.) which can be used for simpler, less formal conversations, as well as time-sensitive communication.

Consult with your organization’s IT department to determine what tools are available to use.

### PROVIDE OPPORTUNITIES FOR REMOTE SOCIAL INTERACTION

One of the most essential steps a manager can take is to structure ways for employees to interact socially (that is, have informal conversations about non-work topics) while working remotely. This is true for all remote workers, but particularly so for workers who have been abruptly transitioned out of the office.

The easiest way to establish some basic social interaction is to leave some time at the beginning of team meetings just for non-work items (e.g., “We’re going to spend the first few minutes just catching up with each other. How was your weekend?”). Other options include virtual coffee breaks or lunch parties. While these types of events may sound artificial or forced, experienced managers of remote workers (and the workers themselves) report that virtual events help reduce feelings of isolation, promoting a sense of belonging.

### OFFER ENCOURAGEMENT AND EMOTIONAL SUPPORT

Especially in the context of an abrupt shift to remote work, it is important for managers to acknowledge stress, listen to employees' anxieties and concerns, and empathize with their struggles. If a newly remote employee is clearly struggling but not communicating stress or anxiety, ask them how they're doing. Even a general question such as "How is this remote work situation working out for you so far?" can elicit important information that you might not otherwise hear. Once you ask the question, be sure to listen carefully to the response, and briefly restate it back to the employee, to ensure that you understood correctly. Let the employee's stress or concerns (rather than your own) be the focus of this conversation.

Research on emotional intelligence and emotional contagion tells us that employees look to their managers for cues about how to react to sudden changes or crisis situations. If a manager communicates stress and helplessness, this will have what Daniel Goleman calls a "trickle-down" effect on employees. Effective leaders take a two-pronged approach, both acknowledging the stress and anxiety that employees may be feeling in difficult circumstances, but also providing affirmation of their confidence in their teams, using phrases such as "we've got this," or "this is tough, but I know we can handle it," or "let's look for ways to use our strengths during this time." With this support, employees are more likely to take up the challenge with a sense of purpose and focus.

#### References

"Managing Teleworkers" online course by Utah Department of Human Resource Management

"How Managers Can Support Remote Employees" by Barbara Z. Larson, Susan Vroman, and Erin Makarius, Harvard Business Review, March 18, 2020.