About the Workshop

NICE CXone provides these workshop materials for you to use in training your staff. They are designed to last approximately 60 minutes making them ideal for conducting over lunch or as a short refresher where needed.

The workshop can be delivered either in person or virtually. Activities sometimes have to be slightly modified depending on the delivery mode, but instructions are in the speaker's notes.

The **ideal number of participants** for a workshop is 12-18 people. This allows for interactions without it becoming too unwieldly. A smaller group limits the participant interactions and puts pressure on a smaller number of people. A larger group may limit the amount of participant interaction simply because of space, time, noise, and other factors.

A **Participant Workbook** is provided. Print these out (black and white printing is fine) or email them to participants to print themselves. This serves as a record that participants can customize and keep as a reminder of the content for later reference. Encourage people to mark it up and truly make it their own. Note that in the upper right corner of each slide is the corresponding PW number so participants can easily re-orient themselves when necessary.

Activity should begin as soon as participants enter the training room (in person or virtually). This tells people that the workshop is participatory and starts to get them engaged immediately. The first slide (slide 5 in this file) gives instructions for what they should do once they get settled. Be sure to prepare two flip charts, chat pods, open answer poll questions, or whiteboards ahead of time. And be sure to circulate and talk to people, learning who they are and personally welcoming them as they complete this pre-workshop activity.

Introductions: Because this is a short workshop, no time was allotted for each participant to introduce themselves to everyone else. Introductions can easily take 20 minutes, and that's one-third of the time allotted for the entire workshop. Instead, use the pre-workshop activity time to circulate, learn who people are, and introduce them to people sitting nearby. Virtually, participants can introduce themselves in chat as part of the pre-workshop activity.

PRINTING THE LEADER'S GUIDE

The Leader's Guide is the Notes view of this PowerPoint file. The first 4 pages are instructions for the trainer and are hidden from presentation. You can print these pages in slide view to make them easier to read. For the rest of the PowerPoint file, print the Notes pages so that you will have a thumbnail of the slide with speakers notes beneath.

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Preparing to Lead the Workshop

The **key factors for success** in the workshop are how comfortable you are with the material and inserting personal stories to help illustrate the content. To get comfortable with the material, plan to start preparing at least one week ahead of time.

- Read through the speaker's notes a number of times over the first couple of days.
- Make notes of stories you could add and points you want to emphasize.
- Do NOT plan to read the speaker's notes word-for-word. The notes provide background information for the trainer to make sure you are comfortable with all of the content.
- You also do not have to cover every bullet on every slide, and participants certainly don't need you to read them off the slide to them. For each tip, you can say here are some things you can do to support this tip, and then just highlight 2-3 of them. Or you can ask participants to look down the list and choose 1-2 they want to discuss. All of the points are in the Participant Workbook, so everyone has a record of them for reference.
- After you have read through all of the notes several times and made your own notations, practice with your own words, adding your stories. Do this at least once a day for several days ahead of time until you can deliver the entire workshop smoothly and confidently.

THE DAY OF THE WORKSHOP

If delivering in person:

- Make sure that the room is setup. If people are going to be brining food and drinks, make sure they have enough space for those items. And it can be a good idea to have extra paper towels or napkins available.
- Set up two flip chart pages with the two questions and place them in different places in the room with markers nearby.
- Print out copies of the Participant Workbook and have one at each place.
- Have tent cards at each place for people to write their names upon and display in front of them.
- Make sure you are in the room and ready at least 15 minutes before the workshop is scheduled to begin.

If delivering virtually:

- Make sure you are comfortable with the platform you are going to be using. You should have practiced the workshop on the platform several times ahead of the workshop.
- Email all the participants a copy of the Participant Workbook and encourage them to print them out to use during the workshop.
- Have the pre-activity set up as two open-ended poll questions, a divided whiteboard, or two chat pods (with maybe a third chat pod for introductions).
- Be present in the virtual room at least 15 minutes before the workshop is scheduled to begin.
- As people enter the room, welcome them and start interacting with them.

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During the Workshop

- **Relax and enjoy the experience.** You've done your preparation, you know the content, so now it is time to enjoy the final product – the delivery of the workshop.
- **Be aware of your time.** Because you want to encourage participation, questions, and discussion, watch out for "rabbit holes" that become a whole workshop in themselves. If time runs short, you might have to curtail participant interaction, but you definitely want to leave enough time for them to complete an action plan before they leave.
- **Encourage participation.** Virtually, let participants turn on their microphones and talk from time to time. Both in person and virtually, ask what participants think or if they would add anything to the tips. Many will already have experience managing remotely and will have good points to contribute. Additionally, dealing with participants' questions as you go along helps to customize each workshop to the people who are present.
- **Tell stories.** Stories help make points clearer and help increase engagement. You want to tell personal stories that are short and to the point. A five-minute story has to be really gripping to keep people's attention, but a short 30 second story can help clarify the content and keep people engaged.
- **"Nudge Your Neighbor" activities:** Keep these to just 30-60 seconds and then move on. People don't have to share with everyone or the trainer the things they share with just one or two other people during these activities. These activities get the participants to pause and reflect and decide what they might do with the information.

AFTER THE WORKSHOP

Take the time to reflect on your delivery – what went well and what could be improved. Write down a few notes for your future reference.

If you administered an end-of-training evaluation, read through people's responses to aid your reflection and improvement.

Congratulate yourself on leading a successful workshop.

Which workshop will you deliver next? NICE CXone has a number of 1 hour training workshops. Browse our catalog and choose your next topic.

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Workshop Overview

Topic	Activity	Time Allotted	Materials
Pre-workshop activity			PPT 5
Workshop Introduction (5 min)	Discussion	5 min	PPT 6-8; PW
10 Tips for Engaging Remote Employees (25 min)	Presentation (Tips 1-3) Nudge Your Neighbor activity Presentation (Tips 4-6) Nudge Your Neighbor activity Presentation (Tips 7-9) Nudge Your Neighbor activity Presentation (Tip 10)	6 min 1 min 6 min 1 min 6 min 1 min 2 min	PPT 9-12; PW PPT 13 PPT 14-16 PPT 17 PPT 18-20 PPT 21 PPT 22
Recognizing and Dealing with Stress (20 min)	Presentation (3 warning signs) Small Group Discussion Presentation (Remedies)	5 min 10 min 5 min	
Close (10 min)	Review Round Robin 3-2-1 Action Plan Concluding Comments	4 min 5 min 1 min	PPT 23-24 PPT 25 PPT 26

Total Time = 60 min   PPT = PowerPoint Slide   PW = Participant Workbook

Welcome!

As soon as you get settled, provide your answers to the two posted questions.

What is the biggest advantage of working remotely?

What is the biggest challenge of working remotely?

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Managing Remotely

A Workshop

Course Goal and Agenda

The **goal** of this workshop is to help managers who are working with remote employees to better engage and manage these employees.

⦿ Introduction
○ Ten tips to engage remote employees
○ Recognizing and dealing with stress
○ Close

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Advantages of Working Remotely

- Able to get more done in less time
- No commute
- Creates greater employee loyalty
- Saves money for the company and the employee
- Can lower levels of stress

Challenges in Working Remotely

- Lack of face-to-face time
- Lack of access to information
- Interpersonal communication challenges
- Social isolation
- Feeling left out
- Distractions
- Craving work-life balance and physical well-being
- Taking vacation time
- Finding reliable wi-fi
- Cognitive overload

10 Tips for Engaging Remote Employees

❶ Focus on outcomes, not activity

❷ Use cameras wisely

- Cameras on for one-on-one meetings

- Share the screen sometimes

- Call people rather than video conference all the time

- When possible, meet in person annually

❸ Make yourself accessible

- Share your calendar
- Do weekly recurring one-on-one meetings, and never cancel
- Talk, not write, about important topics
- When in doubt, over-communicate
- Establish regular times when you are available
- Brush up on your own online communication skills
- Avoid multi-tasking

Nudge Your Neighbor

Take 30 seconds to tell someone near you one thing you could do to make yourself more accessible to your team.

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❹ Proactively build TRUST

- Trust your team

- Clarify expectations

- Provide materials, equipment, and information

- Talk about employees' talents

- Follow through

- Meet their ongoing needs

- Ensure employees contribute in meaningful ways

- Connect employees to colleagues, customers, and organizational information

- Share and discuss cultural norms

❺ Make it personal

- Value the person first
- Chit chat during beginnings of meetings
- Chat channels for sports, books, movies, or photos of pets, vacations, or family
- Recognize effort and achievements
- Offer encouragement and emotional support
- Be flexible
- Be vulnerable, authentic, and patient
- Assume positive intent

⑥ Encourage connections among team members

- Overlap team schedules
- Pair up people
- Do "virtual teambuilding" activities
- Create a mini-book of team members
- Ask team to create a team charter
- Recognize, reward, and celebrate
- Use memes
- Encourage empathy
- Ask for their opinions

Nudge Your Neighbor

Take 30 seconds to tell someone near you one thing you could do to help your team members connect to each other.

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❼ Get agreement on basics

- Normal working hours
- How long to take in responding to each other
- How will notify the team if going to be unavailable
- When to use email, IM, phone, video, etc.
- Best way and time to reach each other
- Ground rules for team interactions

⑧ Communicate

- Weekly one-on-ones
  - May be longer for remote employees
  - Consistently held
  - Ask questions such as:
    - What's your favorite part about working remotely?
    - What's your daily routine like for work?
    - Do you feel included in our team decisions? Why/why not?
    - How is your workspace set up so you can focus and get things done during the day?
    - How could I better support you?

- Weekly Action Reviews

- Conduct team huddles

- Make brainstorming remote friendly

⑨ Intentionally connect to the organization

- Mission, vision, and values

- Talk about how employees contribute to goals and objectives

- Make sure the team has meaningful shared goals

- Talk about progress

- Share organizational news

- Share industry news

Nudge Your Neighbor

Take 30 seconds to tell someone near you one thing you could do to connect your team members to the organization.

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⑩ Remember their career development

Recognizing and Dealing with Stress

3 Warning Signs of Stress

❶ Decreased resilience

Compared to 4 months ago:

- More difficulty concentrating
- Loss of interest in things I used to enjoy
- Feeling hopeless about my future
- Feeling distant or cut off from others
- Feeling irritable or angry

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3 Warning Signs of Stress

❶ Decreased resilience

Compared to 4 months ago:

- More difficulty concentrating
- Loss of interest in things I used to enjoy
- Feeling hopeless about my future
- Feeling distant or cut off from others
- Feeling irritable or angry

❷ Making mistakes

Usually preceded by:

- Forgetting little things
- Being distracted
- Spaciness

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Usually preceded by:

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- Spaciness

❸ Negative and emotional language
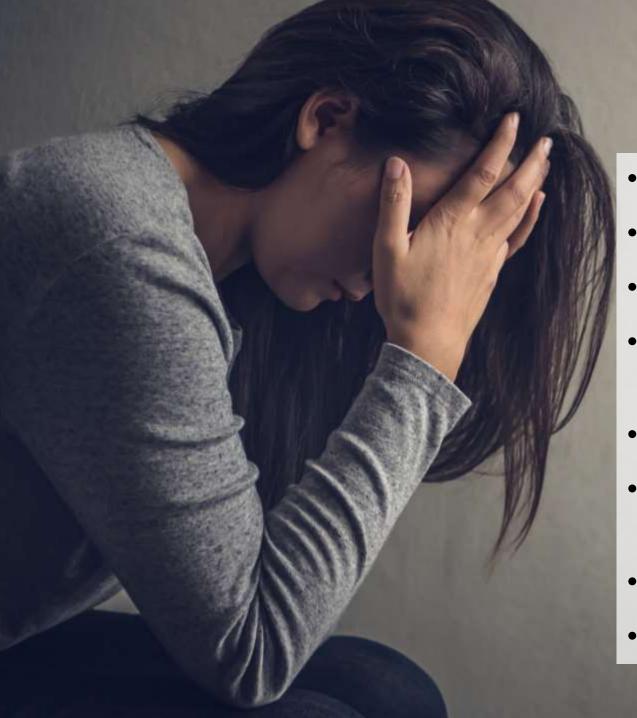
- Black and white thinking

- Catastrophizing

Examples:

- There's nothing I can do

- There are no options

- I can't do anything

- This is impossible

Small Group Discussion

- Share an example of one of the warning signs of stress you have seen in yourself or a team member

- Brainstorm some ways you can help team members experiencing stress

- Be prepared to share your best idea with the rest of the class

Stress Remedies

- Set boundaries
- Set work expectations early and clearly
- Give them help when they need it
- Make sure they have the right knowledge, goals, and motivations
- Don't stop engaging with them
- Respect routine, but experiment with change
- Roll with the changes
- Watch out for your own stress

Close

① Focus on outcomes, not activity

② Use cameras wisely

③ Make yourself accessible

④ Proactively build trust

⑤ Make it personal

⑥ Encourage connections among team members

⑦ Get agreement on basics

⑧ Communicate

⑨ Intentionally connect to the organization

⑩ Remember their career development

3 warning signs of stress

Negative and emotional language

Decreased resilience

Making mistakes

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3 – 2 – 1 Action Plan

❸ What are three things that you learned or were reminded about for engaging and managing a remote team?

❷ What are two things you want to do to better manage your team?

❶ What is one thing you are going to do right away?

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Managing Remotely
A training workshop

https://www.niceincontact.com/

Developed by Elaine Carr and Laura Grimes
of Harrington Consulting Group
(https://www.harringtonconsulting.us/)

Speaker Notes – Slide 6

This slide should be displayed as people are arriving for the training.

If you are presenting virtually: Turn this slide into a whiteboard or use two chat pods or two open-answer poll questions for people to put their answers to the two questions. Also be sure to turn on your camera.

If you are conducting the workshop in person: Place two flip chart pages, one for each question, at two places in the room with markers for people to move around and write their answers. Or place the questions on a whiteboard with space for people to add their answers.

Speaker Notes – Slide 7

Welcome them to the training.

Briefly establish any housekeeping rules (such as muting their cell phones, taking their cell phones outside if they really need to take a call, where the rest rooms are, etc.) that are needed for the training.

Briefly introduce yourself, trying to keep this introduction to 30-60 seconds since you want the attention on the content and the participants rather than on you. If you would like, insert a slide after this one that introduces yourself.

For virtual training, you can turn off your camera after your introduction. This enables everyone to focus on the content instead of being distracted by what is happening on camera.

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Speaker Notes – Slide 8

Remote is the new normal. While many people had to work from home suddenly due to the 2020 pandemic, as things return to normal, many workers will continue working remotely or go to a hybrid model where some days are spent in the office and other days are working remotely.

While many managers have had to learn on-the-fly how to manage remotely due to the sudden shift, it's now time to solidify your learning on how to manage remote employees more effectively.

Go over the workshop goal and agenda as laid out on this slide, briefly indicating what we will be covering in the next hour.

Speaker Notes – Slide 9

Compare these lists to the lists that participants produced at the beginning of the workshop.

Comments are below on each bullet, but do not feel like you have to comment on each item. Either comment only on those that participants have not previously identified or let participants look down the list and ask them if they want to talk about or have any questions about a particular item.

Advantages:
- Study after study has shown that people working from home are more productive. A study by Stanford Economics Professor Nicholas Bloom found that people working from home are 13.5% more productive than working in the office.
- The lack of a commute is a great advantage. People have more time for their families and leisure activities, and we do not have to face the stress of rush hour traffic.
- In an MIT Sloan School of Management Quality of Life Survey prior, 83% of the respondents had greater loyalty for an employer who offered flexibility. Being able to schedule home repairs and change out loads of laundry during the workday while also working in comfortable clothing and with all the comforts of home nearby make life easier to manage.
- Both companies and employees save money when employees work from home.
    - With no commute, employees can save $2,000 - $6,500 annually on reduced gasoline and insurance costs, along with less wear-and-tear on their cars. [Source: Bersin]
    - The study by Professor Bloom found one company saved $1900 per remote employee over a 9-month period due to lower utilities and reduced (or eliminated) real estate leasing as they did not need the space to house employees on site.
- The MIT Quality of Life Survey also had 85% of respondents indicate that their stress was reduced and 80% said that their morale and engagement improved when they worked from home.

Challenges
- Lack of face-to-face time can lead to employees struggling with reduced access to managerial support and communication.
- Lack of access to information as new employees struggle with finding where information is stored or companies scurry to get more information digitized and available to remote workers.
- Interpersonal communication challenges: If you know that a co-worker is having a difficult day, you are more likely to cut them some slack when they write a brusque email. When you do not know about their difficulties, you are more likely to assume negative intentions for that brusque email and take offense. We tend to lack knowledge about co-workers' mental states when working remotely and are much more likely to react poorly then when that stress or negative state is reflected in their communications or work product.
- Social isolation causes loneliness, especially in the pandemic when people have been restricted in their non-work social outlets as well. Over a period of time, both introverts and extraverts suffer ill effects from loneliness and have to consciously take steps to counteract the social isolation.
- Related to social isolation, remote workers can feel left out, especially if other employees are not working remotely. Parties, lunches, holiday costumes, business decisions, and new policies can be happening or communicated only with co-located employees, leaving out the remote workers. We have to consciously and creatively take steps to communicate thoroughly and include remote workers in social activities.
- Distractions may be greater at home. Sure, we don't have people stopping by our desks for this, that, and the other, but there's the distraction of things that need to be done around the house, children needing help with schoolwork or fighting with each other, and just lack of structure to get started (or end) the workday.
- Some people lack work-life balance when work is at home as they think they should always be working. Or they may lack physical well-being without the office to walk around in or even the walk from the parking lot to the office twice a day.
- Finding reliable wi-fi has been huge for some people. Home internet has not always been up to the demands of working from home or the demands of the number of users who are using internet within the house.
- A recent study by MetLife found that the #1 wellbeing issue for remote workers is feeling tired, which is caused by the cognitive overload of working at home: poor work location, children and pets, many distractions, and poor management with lack of emotional support and clarity from leaders. Some home workers have found that there is too much demanding their attention and energy when working from home.

Ask, With all these challenges, how many of you feel that the advantages outweigh the challenges? Just because the list of challenges is longer on this slide than the advantages, does not mean the challenges win. Not everyone experiences all of these challenges and most of them can be compensated for.

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Speaker Notes – Slide 10

Let's move to 10 tips for managing remote employees to create better engagement and productivity.

Speaker Notes – Slide 11

Tip #1: Focus on outcomes, not activity
If you are trying to manage every aspect of your team's activity remotely, you are probably micromanaging which will actively discourage your team members. You need to trust your remote workers and then address issues as they arise or become apparent. Concentrate on what is being accomplished rather than what is being done. If everyone is meeting their goals, great. If not, then look into the situation.

Speaker Notes – Slide 12

Tip #2: Use cameras wisely

When the pandemic first started and many people were suddenly working from home, some supervisors were requiring employees to keep their webcams on all day long so that they could make sure that people were actually working. What a horrible distrust of employees that is completely demoralizing. It is much more exhausting being on camera constantly rather than being in an office with others. Never mind the constant video feed aggravating bandwidth issues with home wi-fi. Constant camera use can actually take away from productivity as workers concentrate on looking busy rather than on getting things done. Instead, we should use our cameras wisely.

- Cameras are great for one-on-one meetings as they help you pick up on some non-verbal cues and create more of a connection between two people, or a small group of people for team meetings. Just know that when cameras are on, they pull everyone's attention, so if there is something you want everyone to focus upon, it can be better to turn off the cameras. And when there are more than a handful of people on a call, it is usually best to turn off all the cameras as the activity of all those people can become a true distraction.
- Sometimes, share your screen – or have an employee share their screen – to focus on an issue or problem, see how to do things, or share a presentation pictures, or video. Have your camera off so the focus is on the screen.
- To combat "video conference fatigue," sometimes make it a phone call rather than a full video conference. If, when you were in the office, you would have picked up the phone to ask a question rather than walking to the person's desk, then do the same remotely. Not everything has to be a video conference. Or handle things over IM or chat.
- When it is possible, meet together with your team in person once a year. The in-person contact helps solidify virtual relationships and is a great opportunity for the team to assess their activity for the year and/or plan for the upcoming year or a special project.

Speaker Notes – Slide 13

Tip #3: Make yourself accessible

When we were all in the same office, we often talked about having an open-door policy, which meant that we were available for people to drop by and talk at almost any time. We still want to be available to people even though we are remote, so there are some things we should do to maintain a high degree of accessibility.

- If you are using calendar software such as Outlook, set your calendar so that other people can see it. This will enable people to see when you are available and when you are in other meetings or have scheduled focused work time. Things you want to keep private can be marked as private so that people will see that the time is scheduled but not what the topic is. This will help your team feel like they know what is going on with you and when they might be able to contact you outside of regularly scheduled meetings.
- Make sure that you schedule a one-on-one meeting of 30-60 minutes with ever team member every week. If you have a really large team, you might have to make it every other week, but you want to have a consistent time when each team member knows they have your full attention. And you should never cancel these meetings. You might have to reschedule sometimes, but don't cancel. The exception, of course, is when someone is away from work for a whole week – such as on vacation or medical leave.
- When something is important, you need to talk to the team member about it – either individually or as a group if it impacts everyone. Important topics are not for email; they are for conversation.
- People crave communications, so if you find yourself thinking that team members don't need to know things or won't be interested, think again. People feel included and part of things when they are communicated with and they feel like you are available to them. If you have any doubt, over-communicate.
- It can help if you let your team know, in general, when the best times are to contact you. You might let them know that you are generally available midday or that after 3 p.m. in the afternoon is the best time to contact you or whatever is appropriate for your schedule and working style. Indicating a preferred method for communications (email, text, chat, phone, etc.)–even if that is different for different subjects–is also a good idea.
- Brush up on your own online communication skills – using IM, chat, video platforms, etc., so that the communication platform is not your focus but the content of what your team members want to communicate is your focus.
- And make sure that you give team members your full attention. Being online, it is so easy to do other things on your computer while you are talking with people. Avoid that temptation. People can tell when we are inattentive, and it makes them feel devalued. They will be less inclined to contact you in the future, even if you really need the information they have. Give each person your full attention.

Speaker Notes – Slide 14

Activity
If training in person, just have people pair up with someone near them and quickly tell each other one thing they could do (that they are not already doing) to make themselves more accessible to the team. Just let them share with each other. There is no reason that they have to run these things by you or others.

If training virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

Speaker Notes – Slide 15

Tip #4: Proactively build TRUST

How do you build trust? If you have time, let participants respond to this question and make their own suggestions.

- First begin by trusting your team. Trust that they have good intentions, that they want to do a good job, and that they are doing what they can do. That means no micromanaging (like watching them on video all day long!).
- You also need to clarify your expectations with each team member. What should they be working upon? When is it due? What are the performance objectives they should meet? What do you expect from each team member? Additionally, find out what they expect from you so that you can agree about what you will provide to them and how. By clarifying everyone's expectations, you will not end up failing someone else, or they failing you, because expectations were unknown or unclear.
- Talking about employees' talents will help them feel seen and appreciated and will help them trust you. Talk about these talents with the individual team member, with the whole team, with people in other departments, with your boss. It creates a positive environment of trust.
- When you say you are going to do something, be sure you follow through and actually do it. Forgetting about your own action items will cause you to lose trust and be unreliable.
- Part of your job as a supervisor or manager is to meet your team members' work needs, removing obstacles that get in the way of getting things done. and providing tools, strategies, and techniques that help team members accomplish things. You will spend quite a bit of time trying to uncover those works needs and then dealing with them. The point is to help people do their work more effectively.
- For engagement, one of the ingredients people need is to know that the work they are doing is meaningful and contributes to a worthy effort. That doesn't mean that work isn't sometimes tedious or mundane, but overall, is the work each person meaningful to the work of the team and the organization? Reinforce these meanings to help each team member see how their work contributes.
- Some managers like to isolate their team members and have all communication from other departments and other levels of the organization go through them. That is the old command and control management methodology which actually serves to disengage employees. Instead, make it your job to connect them to other parts of the organization, to your customers, and to organizational information Invite other people to come to your staff meetings and speak about topics that impact your team (such as the reasoning behind a particular campaign, new products or services that are coming out, what the marketing department does or finance or billing, etc.). This helps your team members see how their work interacts and supports the work of the rest of the organization and even helps them identify ways to better support other parts of the organization and your customers.
- Finally, share and discuss cultural norms for your team and your organization. What is important to the team? How do they want to operate? What are the values the organization stands for? What do those values mean for your everyday work?

All of these activities help build trust with team members. They will see you as someone they can trust to help get their work done and to contribute meaningfully to the organization.

Speaker Notes – Slide 16

Tip #5: Make it Personal

Especially when everyone is remote, it is very easy to fall into treating everyone like a cog in the machine rather than as individuals with lives of their own. This leads to team members feeling unimportant and of no value. Making it personal leads to engagement through people feeling worthwhile and valued.

- The work of your team is important, but so are all the individual members of the team. Yes, work has to get done, but taking the time to truly understand what motivates and challenges each team member is putting the person first. Help them do a good job by valuing them first.
- Spend some time at the beginning of meetings chatting. How was your weekend? Did your son get his project done on time? Is everything well with your mother? What are you planning for the upcoming holiday? We have these conversations in person and they help us feel connected to each other. Remotely, we have to make the effort to have the same kind of conversations.
- Set up channels (Slack channels or Teams Groups or whatever means you are using for internal communications) for topics of interest to different team members – whether that be sports, books, movies, or something else. Those who are interested can participate and connect on a personal level with each other. You can also have a channel for team members to share pictures of their pets or from their vacations, or of their family, their home office setup, creative projects they completed (a new bread recipe, a crocheted afghan, a wood working project, a new garden, etc.). This helps show you value the whole person, not just the work person.
- Recognize people's effort and achievements – to them and to others. This shows you are paying attention and helps give credit where credit is due.
- Offer encouragement and emotional support when people are going through personal difficulties. We like to think that we can separate our work life from our personal life, but in reality, they bleed into each other. You are not a counsellor or therapist, but you do want to support your team members when they are experiencing personal difficulties.
- One of the advantages of working from home is a certain amount of flexibility. Being able to more easily schedule the air condition technician to come out and do annual maintenance, or take a late lunch to go see your kid's school production, or take a 30-minute break at the end of the school day to make a snack and hear about the school day. If you can be flexible with your team members, arranging things so that they can do these personal things while still getting their work done, team members will be very appreciative and will often work harder for you.
- You don't want to make your interactions all about yourself, but you do need to share some of your own self so that people feel safe with you. That means you are sometimes vulnerable with your team members. You should also always be authentic with them (not fake), and very patient.
- Assume positive intent from people. If the tone of a communication seems brusque or off-putting, don't immediately take offense. Instead start with asking them what is going on. They may be very unintentional in what they have done, conveying a completely wrong impression. Take the time to discover that by always assuming that they mean well – until you find out otherwise (and then address that).

Speaker Notes – Slide 17

Tip #6: Encourage connections among team members

Why do you want your team members to feel connected to each other? It actually makes for a healthier, higher performing team as it helps everyone pull in the same direction. It also helps take some of the load off you as they can provide each other with some of the support they need and everything doesn't have to come from you.

- Your team, especially in contact centers, may be working very different shifts, and even more so if they are working remotely. It helps them feel connected to each other if you can arrange for some overlap in the team's schedules. If someone is working hours when no other team members are working, they will feel even more isolated.
- Pair up people to help each other, to work on special projects, to research new processes or situations that arise. This gives people a natural way to connect while also helping them feel valued and creating greater engagement.
- Do "virtual teambuilding" activities. Have each person create a one slide graphic that expresses their strengths or have everyone do a Strengths Finder assessment and share the results. Have people take responsibility for the next staff meeting or team huddle. Send everyone pizza for a virtual pizza party. We just have to be creative about how we build teams virtually.
- Create a mini-book of team members so that everyone can learn something new about the people they work with. This also helps new team members learn about their new team.
- As already mentioned elsewhere, recognize, reward, and celebrate to help team members feel valued and connected and visible.
- A meme is a humorous image, video, piece of text, etc., that is copied (often with slight variations) and spread rapidly by internet users. Sharing (appropriate) memes with team members can cause everyone to smile or even laugh for a moment and helps create a feeling of connection.
- Encourage team members to be empathetic towards others (not just customers) and to assume positive intent. This might take more work for some people but be encouraging and help them see a different way of viewing difficult situations.
- Nothing builds trust and connection faster than asking people for their opinions and then actually acting on those opinions. Granted, you don't want to react to every whim. But when you can incorporate people's suggestions into your work (and acknowledge their contribution), they will feel important and be more in engaged.

Speaker Notes – Slide 18

Activity
If training in person, just have people pair up with someone near them and quickly tell each other one thing they could do (that they are not already doing) to make themselves more accessible to the team. Just let them share with each other. There is no reason that they have to run these things by you or others.

If training virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

Speaker Notes – Slide 19

Tip #7: Get agreement on basics

Get your team together to decide on the basics of how they will interact. Then review this periodically (perhaps annually) and make adjustments as needed. This helps the team pull together. Some of the things the team should come to agreement about include:

- Normal working hours – Individually or as a team. With contact centers, those hours may be assigned by Workforce Management, but they should be readily known by all team members so that when someone has a question or a comment, they know when the other person is working. Some positions have more flexibility so the team might decide that while people will start and end at different times, they are going to all be available between 9:30 a.m. and 3 p.m. each day, for example.
- The team should decide how long they will take to respond to email requests, for example. We can't (and shouldn't) always stop everything when an email comes in as this causes work to take longer because of the interruptions. But we can say that we will check email at regular times during the day (say before lunch and before closing up for the day, as an example) and will respond at that time. If it is an urgent matter that needs a quick reply, the team might make a policy to notify the person via IM or text so that they can go look at the email. The team should decide these policies together.
- If someone calls out sick, what do they need to do? Just inform their manager and the manager will let it be known to others, or should they send out an email or IM to the team? Should they set the out-of-office message on their email system? What is the expectation when people's schedules differ from the ordinary? Who needs to know when people will be unavailable due to vacation? Or a doctor's appointment? Set these expectations clearly with the entire team.
- The team should also decide when it is best to use different communication channels. Text me if it needs my immediate attention, otherwise just send an email. Or I prefer to not receive emails with new work attached to it after 3 p.m. on Fridays as I'm trying to finish up my work for the week. (I started to set a timer on Friday afternoon emails so that I could get the work off my plate but it wouldn't arrive to the other person until Monday morning.) When will the team use video conferencing? IM? The phone? As a group, make some decisions together and then make individual preferences known as well.
- When is the best time and manner to reach each other? One person has children and likes to take a break when they get home from school, so reaching them before 2:30 p.m. is best. Another person tries to schedule all of their meetings in the morning, so is more available in the afternoon. A third person has daily radiation treatments after their cancer surgery and these are scheduled at 1:30 each day. They are gone for an hour but are really tired afterwards, so it's better to reach out to them in the mornings. Everyone doesn't have to have the same preferences, but making their norms available to everyone is important.
- An example of a ground rule for team interactions might be "Assume positive intent." or "Be curious and keep an open mind." or "What is the customer's viewpoint?" You shouldn't have a long list of ground rules for team interactions as that makes it unwieldly, but 4-5 basics that the group determines for itself can be very helpful. These will definitely need to be modified over time as needed.

Speaker Notes – Slide 20

Tip #8: Communicate

Communication is the most important element for keeping remote workers connected and engaged and productive. Some regular communication that managers/supervisors should set up include:

- A weekly one-on-one for each team member.
    - This may need to be longer for remote employees as they are unable to just pop in and ask you a quick question and they don't have updates that are spread from mouth-to-mouth during in person work. So leave plenty of time to cover all updates.
    - Be sure to hold the one-on-ones consistently, rarely if ever cancelling, so that team members can rely upon them.
    - Be ready to ask some general questions such as the ones on the slide. Ask one every time there is extra time in the meeting. They help uncover issues and also help team members think through and structure their work better.
- Weekly Action Review (sometimes called WAR meetings) can be done in team meetings or via email on Friday afternoon or Monday morning. Each person reports to the team on accomplishments for the past week, obstacles they ran into, and plans for the next week. This allows all team members to be informed on the work of the team and to help each other out with obstacles.
- In person you probably held team huddles – short, stand-up team meetings to cover important issues people needed to be aware of for the day. There is no reason huddles can't be held virtually via video conference, joint phone calls, or via short, succinct emails. Generally, these huddles are better when delivered verbally than in writing but do what works for your team. The advantage of using video conferencing is that they can be recorded for team members who miss the huddle due to getting stuck on a call or in an overlong meeting.
- Ideating is when you come up with ideas to address an issue or make improvements. This could be brainstorming or uncovering information with questions or some other method. Make this activity remote friendly by using a brainstorming or ideating app, or just sharing the screen in a video conference, allowing people to add their ideas to a document through a whiteboard. We may not be able to huddle around a flip chart or whiteboard or put up post-it notes or pass around index cards, but there are many applications that mimic these activities online, and PowerPoint or Word can be used in much the same way by sharing screen.

Speaker Notes – Slide 21

Tip #9: Intentionally connect to the organization

People need to be connected to the organization as a whole and not just their team. People are more engaged when they feel part of an organization doing meaningful work. As a supervisor or manager, part of your job is to help people feel connected to their organization.

- Make the organization's mission, vision, and values part of the everyday fabric of the workday. Make sure that people know what these are and then talk about them as applied to what everyone does everyday. Frequently bring them up in conversations.
- Also frequently talk about how employees contribute to the organization's or the contact center's goals and objectives. Team members are not just doing things to comply with policy –they need to understand how what they do contributes to the organization's success.
- Make sure, too, that the team as a whole has meaningful shared goals that they are working on together. Each may be doing something separately, but how does all that individual work come together to support the team and the organization?
- Talk about progress on shared goals and on the organization's goals. If the organization set a goal to reduce costs by 10% overall this year, we should know each quarter how we are progressing towards that goal. Otherwise, we are powerless to impact the goal in a meaningful way.
- Share organizational news, even if it doesn't seem like it will impact the team or individuals. This will help them feel connected to the entire organization.
- And go a step forward and share industry news. What is happening in the wider world that might impact their organization or their profession? Share and talk about these things to help team members feel empowered, knowledgeable, and valued.

Speaker Notes – Slide 22

Activity

If training in person, just have people pair up with someone near them and quickly tell each other one thing they could do (that they are not already doing) to make themselves more accessible to the team. Just let them share with each other. There is no reason that they have to run these things by you or others.

If training virtually, have people respond in chat. You should acknowledge what people have written but do not do a lot of commenting.

This should be a short 30-60 seconds pause for participants to reflect for a moment before going on.

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Speaker Notes – Slide 23

Tip #10: Remember their career development

When people are working remotely, it is quite easy to forget about their career development. Don't forget! Career development helps people feel valued, connected, engaged, and loyal. Look for online training to address development needs, use the company LMS (if it exists), use LinkedIn training (if your company makes it available), regularly coach team members on performance, provide regular lunch 'n' learns, look for free webinars, and assign people stretch projects to expand their abilities. All the things done to develop your people in person can generally be done virtually. Make a point of addressing each team member's development goals at least quarterly.

Speaker Notes – Slide 24

Stress has a big impact on our team members. In this section, we are going to briefly talk about how to recognize stress in remote employees and some things to do to help with stress. Let's begin with the three warning signs of stress.

Speaker Notes – Slide 25

Sign #1: Decreased resilience
ASK, What does resilience mean? <wait for answers> Resilience is our ability to handle adversity. Sometimes we handle it well – "rolling with the punches," and other times, we handle it less well – having a "meltdown."

Your employees can assess this for themselves, or you can ask them if, compared to 4 months ago:
- They are having more difficulty concentrating
- Have lost interest in things they used to enjoy
- They are feeling hopeless/discouraged about the future
- They feel distant or cut off from others
- They are feeling irritable or angry more easily and more often

These are all signs of decreased resilience

Speaker Notes – Slide 26

Sign #2: Making mistakes

Everyone makes mistakes from time to time, but it is a sign of stress when it begins happening more often. Usually, this sign is preceded by

- people forgetting little things that would normally be second nature for them
- Being distracted, such as zoning out during a meeting.
- Or some general spaciness where the person doesn't seem to be "all there"

Speaker Notes – Slide 27

Sign #3: Negative and emotional language
When people feel stressed, their language often becomes more "black and white." When they might say "This project is going to be hard," they might say, "This project is impossible," or "I'll never finish this in time." The use of absolutes like "never" and "impossible" are sure signs of black and white thinking.

Another kind of negative language is known as catastrophizing. This is where people carry things to extremes – everything is life and death. For example, catastrophizing language might be "If I don't finish this, my career is over." or "I'll be fired."

The slide has some additional examples of negative and emotional language.

Speaker Notes – Slide 28

Activity: Small Group Discussion
Divide the class into groups of 3-6 people and have them share examples and brainstorm remedies as instructed on the slide.
If you are presenting virtually – have them go into breakout rooms.
If presenting in person – use table groups or just have them pull chairs together in different parts of the room.

Allow 6 minutes for discussion and then bring everyone back together.

Debrief: Each group shares the best idea they had for helping team members deal with stress.

Speaker Notes – Slide 29

Dealing with employees' stress:

Once you know the warning signs of stress, you can assess your team and intervene as appropriate.

- Help your team member set boundaries. Because work and life are happening in the same space, sometimes it feels like there is no separation and work never ends. Maybe an end of the day routine would help where they turn off their laptop and put it away in a drawer or box until the next morning. Can they set up a small space in their home that is for work only? Cover that space, setting up a screen, or closing a door at the end of the day can help create some separation. What other boundaries might be fading and need to be re-established?
- Set work expectations early and clearly. Many supervisors never really state their expectations so employees might think they have to respond immediately to messages from their "boss," when you are quite happy if you get a response in 4 hours unless you've marked it urgent. For any task you assign, have you given a clear deadline? Not just "the middle of the month," but a particular date. Do they know how flexible or rigid each deadline is? When they have conflicting task, how do they prioritize, or do they just try to do too much?
- Make sure they have the right knowledge, goals, and motivations: Are they focusing on the right things or are they stressing out about things they can't control? Help them understand their goals and the reasons for those goals, and make sure they can access the information they need to accomplish the goals.
- Don't stop engaging with them: Because it is a difficult situation that is out of other people's control, some people will avoid the team member. Don't do that as it just makes stress worse. Engage in chit chat, do things to make life seem more normal, and help the person feel less isolated and alone.
- Respect routine, but experiment with change: Having a regular work routine everyday is really helpful when dealing with stress as the person doesn't constantly have to decide what comes next. Routine can make things feel more normal. But sometimes you have to experiment with changes to find better routines. For instance, maybe you need to encourage the team member to take a break at lunch everyday and go outside to take a walk. On pretty days, maybe they can actually go outside and work. Adding good start of the day and end of the day routines can really help separate work and life, too.
- Roll with the changes: Sometimes no one knows enough to know what will happen and we just have to roll with the flow. That means doing the next thing that has to be done rather than anticipating the great unknown that is several tasks ahead. Encourage people to deal with the things they have in front of them and wait to see what else happens. By the time the "what else" gets here, it might not be so bad.
- Watch out for your own stress: Don't forget about yourself. Get some exercise, eat healthy, visit with friends and family, do something different to break up the mundane, listen to upbeat music, read a good book, and watch your outlook. It's hard to help anyone else with stress if you don't deal with your own stress first.

Speaker Notes – Slide 30

Let's wrap up today's topic

Speaker Notes – Slide 31

Review:
Just as a reminder, here are the 10 tips for engaging and managing team members remotely and the 3 warning signs of stress.

Do a round robin where each person indicates the one thing they most want to remember from the workshop. They can do this verbally (whether in person or virtually), or in chat (virtually).