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## **ARTICLE** **MANAGING PEOPLE**

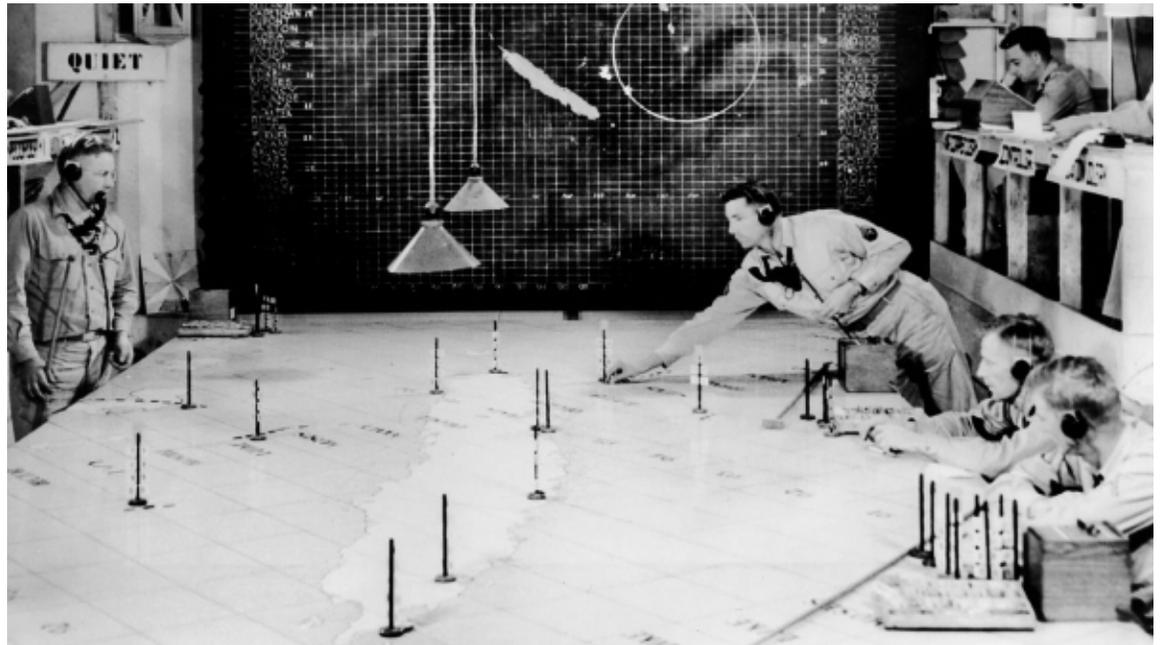
# How to Manage Remote Direct Reports

*by Rebecca Knight*

MANAGING PEOPLE

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Geographically dispersed teams are increasingly common in the modern workplace — perhaps you’re based in your company’s New York headquarters and your team works out of offices in Denver and Charlotte or maybe you’re in San Francisco and manage telecommuters in LA and a group of developers in Minsk. How do you overcome the challenges of supervising employees in different locations and time zones? What steps should you take to [build trust](#) and open lines of communication? How should you establish routines? And how do you help remote workers feel part of a team?

## What the Experts Say

One of the biggest misconceptions about managing remote workers is that it requires an entirely different skillset. “We have a tendency to overcompensate and approach remote workers and virtual teams as these mythical beasts,” says Mark Mortensen, an associate professor of Organizational Behavior at INSEAD. “But you shouldn’t think about them in a fundamentally different way. They are still people working in an organization to get stuff done. Treat them as such.” That said, managers must put in extra effort to cultivate a positive team dynamic and ensure remote workers feel connected to other colleagues. It requires a “proactive approach,” says Keith Ferrazzi, the founder and CEO of Ferrazzi Greenlight. So, whether your team is comprised of people in far-flung locations in faraway time zones or employees who work from home (or a combination of both), here are some pointers to keep things running smoothly.

### Set expectations

“As the manager, you need to set clear, deliberate expectations in advance and establish ground rules for how interactions will take place,” says Ferrazzi. If you fail to do this, “things will break down immediately.” He recommends “establishing clear lines of accountability” from the outset of the working relationship by setting monthly, quarterly, and yearly performance goals as well as “targets for what ‘hitting it out of the park’ would mean.” Then, just as you would with employees working down the hall, “you should check in regularly on progress” through an agreed-upon schedule. Mortensen adds: be sure to make it clear that you’re “applying the same metrics to the rest of the team.” Remote workers “need to know that they’re not being treated differently and there’s no inequity.”

### Visit on a predictable schedule

There are no rules governing precisely how often you need to see your remote workers in person, but Mortensen recommends [visiting them regularly](#) especially in the early stages. “If you can get yourself to their location when you first start working together, that’s invaluable,” he says. “Seeing people one-on-one, face-to-face sets the tone and gives people a sense of comfort.” As the arrangement stabilizes, “predictability is more important than a particular frequency,” he says. “If your direct report knows you’re there every six months, it helps build trust.” When you’re at their location, make an effort to “understand their environment and get a sense of what it’s like” to work from afar. “Join in on a conference call to the home office so you can get a glimpse of [the situation] from their perspective,” Mortensen says.

### Encourage communication

The key to managing relationships with remote employees, says Ferrazzi, is to “set an appropriate cadence” of communications—including how quickly employees need to respond to email; what follow-up steps should be taken; and on which days check-in calls should occur. “If you, the manager, don’t create good, open communication channels, the remote worker will feel, well, ‘remote’ and forgotten,” he says. It’s also important to establish frequent, recurring team meetings that at least attempt to accommodate everyone’s schedule, he adds. In light of [time-zone constraints](#), it’s considerate to set up the meetings on a rotating schedule so that no one team member or region is

unduly burdened or disrupted. Encourage the use of instant messaging, blogs, wikis, and other online collaboration tools and apps. Your team must “understand that they have an obligation” to stay in regular contact, says Mortensen.

### **Spark impromptu interactions**

Unplanned conversations between coworkers are “important for flows of knowledge throughout an organization,” says Mortensen, which is why you – the manager – have a responsibility to “literally create water cooler moments.” Video links between offices “create a shared space and provide more opportunities for these spontaneous – but often very productive” workplace conversations, he says. “It might feel weird the first day it’s on, but by the tenth day, people are more comfortable.” When it’s not possible (or preferable) to have a camera that’s always on, Ferrazzi recommends regular use of technologies like Skype and WebEx. Video technology, he says, “brings us together and connects us, increasing the intimacy of our relationships with one another.”

### **Nurture familiarity**

Building trust and familiarity with your direct reports requires you get to know them on a personal level. With remote workers “this takes additional effort,” says Mortensen. He suggests reserving the first few minutes of calls and videoconferences to simply “chew the fat.” You should talk about “the things you usually talk about at work” – weekend plans, kids, pets, or last night’s big game.

Encourage your direct reports to do the same with their remote colleagues. This social bonding “builds essential empathy, trust, and camaraderie,” Ferrazzi says. “What binds together virtual teams are the personal details.”

### **Make them feel part of the team**

Physical distance can sometimes create an “us versus them” feeling. Mortensen says it’s critical that you “watch the language you use when talking about remote workers and make sure you’re not creating fractures within your team.” Concentrate on what you and your direct reports have in common – organizational goals and objectives, for example. Remember, too, that remote team members often feel somewhat invisible and “that their actions and efforts aren’t noticed.” Being generous with public praise and acknowledgement of remote employees helps “make sure their work is recognized” and is a signal to “coworkers that they’re pulling their weight,” says Mortensen.

### **Principles to Remember**

#### **Do**

- Get to know your remote reports on a personal level by reserving a few minutes during meetings and calls for casual workplace conversations
- Establish a schedule of communication both between you and your remote employee and between the remote employee and the rest of the team
- Use video technology to spark spontaneous interactions among your team members

## **Don't**

- Evaluate the job performance of remote workers differently from the way you assess co-located colleagues — apply the same metrics across your team
- Worry too much about setting up constant in-person meetings with your remote workers — predictable visits are more important than frequent ones
- Forget to acknowledge the work of remote workers so their efforts don't go unnoticed

### **Case Study #1: Unite employees around a common goal**

Arvind Sarin, the co-founder and CEO of Copper Mobile, a mobile app development firm, manages over 100 employees split between the company's headquarters in Dallas, Texas, and its office in Noida, India. The majority of the company's clients are in North America. Because of the difference in time zones, there was some resentment between team members. "There was still a feeling of: 'Oh, that team over there rolls out at 6pm while we're here working late into the night,'" he explains.

To mitigate the building resentment and bring the team together, Arvind decided to be more open about the company's overarching goals and financial targets. He took a new approach with a big project Copper Mobile was working on for an LA-based dating company. "In order to get everyone on the same page, I painted a picture of our strategy so that everyone — from developers in India to the leadership team here — would know what we're doing," he says.

His aim was to "lay it all out" for employees in both offices "so that everyone knew what to expect" and felt bonded by a common goal — to successfully execute the project. In a series of meetings, "we explained how much revenue this client would bring in, what the billing rates would be, how long we expected the engagement to last, what the workflow would be like, and how we viewed this customer as a strategic client."

Arvind's transparency about the project united the team and motivated employees to work together. The project was a big success. "When you don't give people information, they assume the worst," he says. "Restating our vision and reminding people of what we were trying to achieve helped a lot."

### **Case Study #2: Seize opportunities for in-person team bonding**

Manon DeFelice, the founder and CEO of Inkwell, a specialized professional staffing company, manages an entirely virtual team.

At the moment, she has eleven employees — all of whom work from home — spread across the US. Recruiting and business development are run out of New York; legal is in Washington, DC; she also has colleagues in Austin, Miami, and Minneapolis. Manon herself is based in Connecticut. "Because we're a virtual team, we don't have that daily office chitchat," she says, adding she has to work hard to make sure she is close to her colleagues and that everyone on her team "feels connected to, and trusts, each other."

To encourage bonding, Manon tries to seize every opportunity to gather the group together face-to-face. She recently had a big pitch meeting in New York City. Instead of enlisting the help of only local employees, she invited everyone on the team to the City and then took them all out for celebratory dinner. “We are not renting expensive office space so I like to spend money taking my team out to nice restaurants. I want people to get to know each other — to talk to each other about their kids and their spouses—just as they would if they worked in an office together.”

Another way Manon lifts team morale is by being generous with praise. She regularly sends company-wide emails praising the team and singling out colleagues for a job well done. The emails, she says, provide public validation. “In an office, your boss might call to you from down the hall and say: ‘Awesome job on that project!’ and your colleagues would hear that and know you’re working hard.” Remote workers, though, don’t have that happen. “So I do public thank-you emails, and CC others as a way for them to ‘eavesdrop’ on the conversation.”

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