Making remote working successful
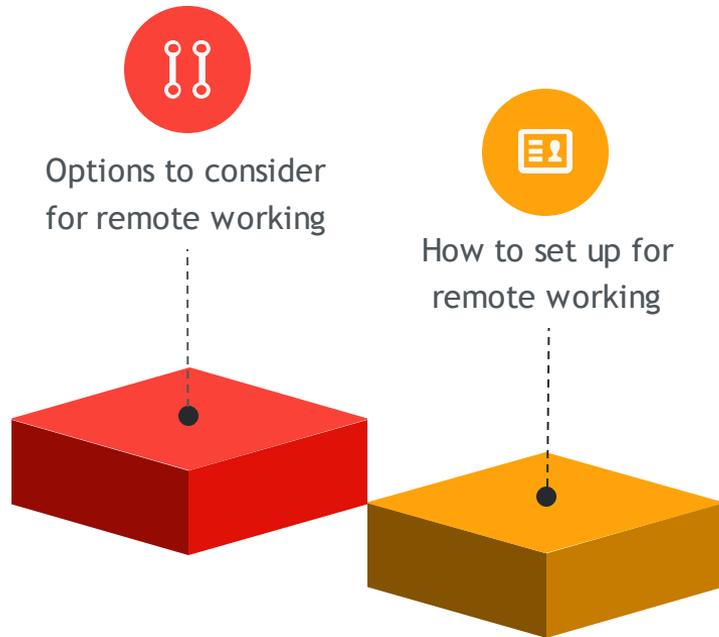
18 March 2020

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As we move towards remote working being a big part of our everyday lives, we have provided a set of tips and tricks to set you up to make the transition easier
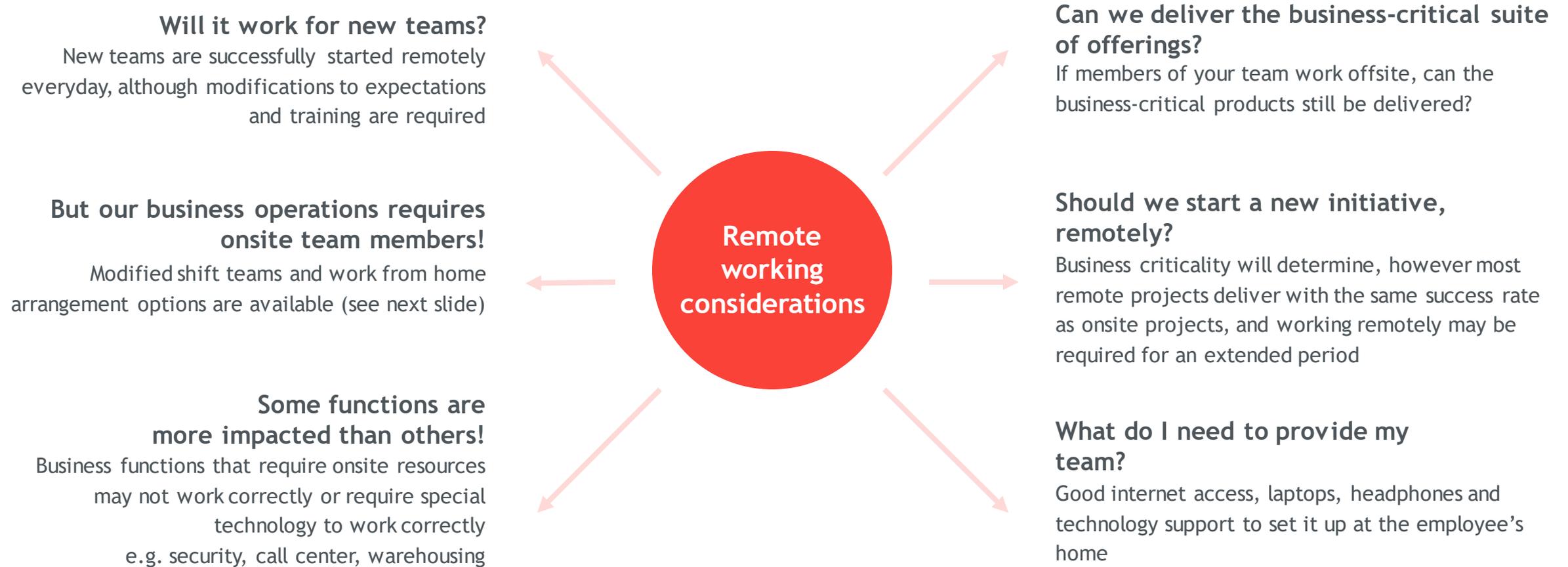
Setting up for
successful remote working

Options to consider
for remote working

How to set up for
remote working

Five tips for
successful remote working

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Agile ways will improve the success of remote working

Will it work for new teams?
New teams are successfully started remotely everyday, although modifications to expectations and training are required

But our business operations requires onsite team members!
Modified shift teams and work from home arrangement options are available (see next slide)

Some functions are more impacted than others!
Business functions that require onsite resources may not work correctly or require special technology to work correctly e.g. security, call center, warehousing

Remote working considerations

Can we deliver the business-critical suite of offerings?
If members of your team work offsite, can the business-critical products still be delivered?

Should we start a new initiative, remotely?
Business criticality will determine, however most remote projects deliver with the same success rate as onsite projects, and working remotely may be required for an extended period

What do I need to provide my team?
Good internet access, laptops, headphones and technology support to set it up at the employee's home

4

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Two options for remote teams that have worked well for our clients

Scheduling A & B teams to take turns at working remotely and in the office

- A and B cross functional operations teams are setup to maintain onsite office activities across business-critical functions
- Splitting teams minimises the risk of spread of disease, while maintaining business operations
- Certain teams remain working in the office and other teams work remotely on rostered rotation
- A & B team members can only physically interact with people from the same roster
- Synchronization of team activities performed remotely

All individuals and teams work remotely

- All team members work only from home or an alternate location
- All meetings are held remotely with limited or zero in-person interaction at the office site
- Distribution of teams often aligned to time zones, and agile cross functional teams and agile ways of working recommended for increased successful operations

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Setup the basics for remote teams to ensure they connect well personally and with confidence

Establish team norms to maximise rapport

- Introduce all team members and explain purpose of forming the team
- Hold a team norms session to set expectations on availability times, behaviours encouraged and discouraged, and preferred methods of communication
- Include an online ice-breaker in your team norms session to ensure the team know each other and connect well

Create team mission and goals for alignment

- Conduct online workshop to set the team's mission and vision
- Conduct online workshop(s) to agree on goals to be delivered and build the initial work backlog of the team
- Agree on objectives and key results (OKRs) and how team epics and stories will deliver to these

Create the right workspace environment

- Arrange access to strong internet connection (e.g. stay close to Wi-Fi router or use wired connection) and the right equipment (e.g. headphones, camera, microphone) to ensure high quality of communication
- Ensure workspace is ergonomically setup
- Work in a quiet area with minimum distractions (audio and visual) and good lighting (e.g. areas with soft furnishings and carpets reduce echoing)
- Prepare for face to face contact at every meeting

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Sample team norms session to kickstart remote working

1 Reflect about past remote working experience

5 – 10 minutes

Participants to reflect on past remote working experience

Answer the two questions:

- What has enabled effective remote work?
- What has hindered effectiveness?

10 minutes

Participants to share their reflections

2 Develop remote working principles

10 – 15 minutes

Based on their reflections around what has worked and what has not, ask members to come up with their own essential principles for remote working

- Each person should write no less than 5 and no more than 10 principles on digital post-its
- When everyone has finished, review them

3 Agree remote working principles

5 minutes

Each participant to be given three 'digital' dots to vote for the remote working principles that they like

15 minutes

Take a look at the heatmap and discuss the top five principles

Refine the principles if needed

Agree and commit to the principles Revisit and revise the principles during retrospectives if needed

Note: As this activity can be conducted remotely, use a tool like Mural or Miro to do this. MURAL is a trademark of Tactivos, Inc. MIRO is a trademark of Project Miro, LLC. ADAPTOVATE does not endorse or recommend any particular products, we provide information and listings only which we hope are helpful.

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Five tips for successful remote working

Plan work for remote working & teaming
Employees when working remotely need clearer than normal goals, tasks, milestones, and transparency of what other members of the team are working upon

Overcommunicate for team engagement
Communicate at more regular intervals, swapping email for more videos and phone calls to engage remote employees face-to-face and one-on-one communications

Maximize the utility of technology tools
Use the right mix of tools that enables effective remote collaboration based on what needs to be done
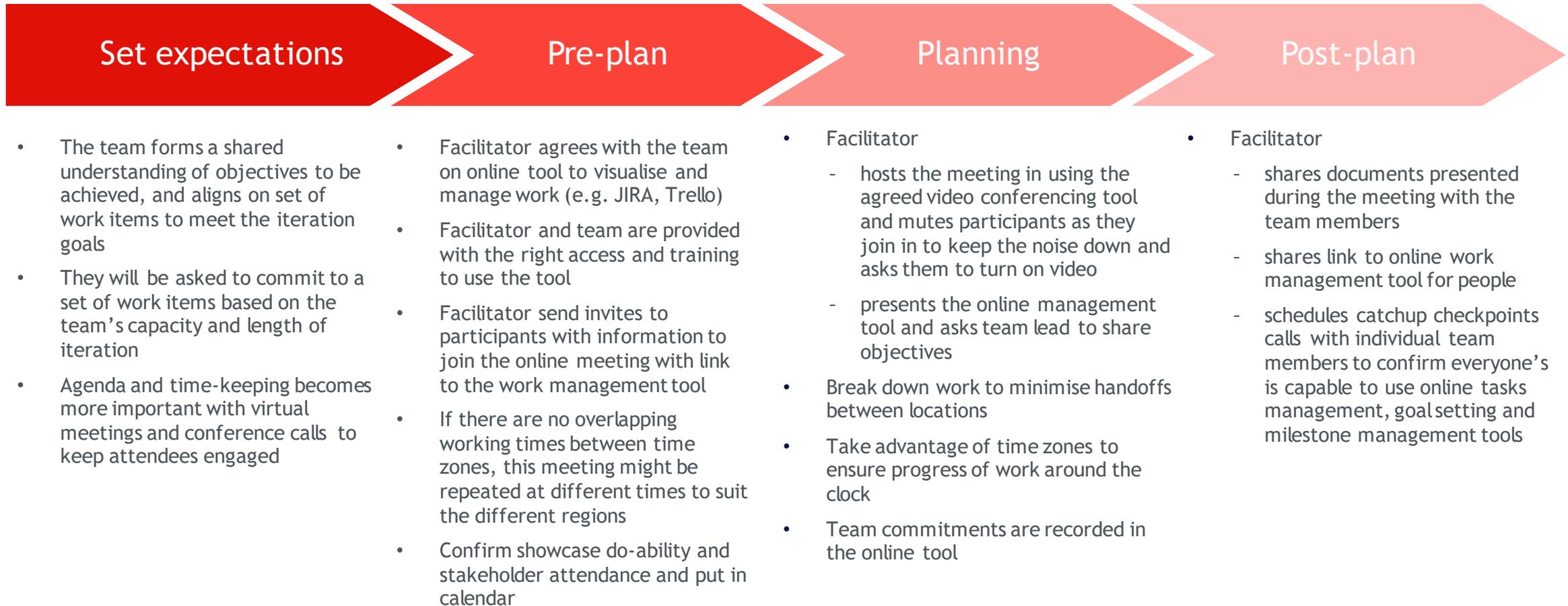
Continuously align
Utilize scheduled and ad-hoc meetings to ensure continuous alignment and informal knowledge transfer

Become overly transparent on feedback
Gather feedback externally and internally to improve ways of working and deliver better value

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Regular planning ensures everyone is on the same page on how the work will get done remotely

Set expectations	Pre-plan	Planning	Post-plan

Set expectations

- The team forms a shared understanding of objectives to be achieved, and aligns on set of work items to meet the iteration goals
- They will be asked to commit to a set of work items based on the team's capacity and length of iteration
- Agenda and time-keeping becomes more important with virtual meetings and conference calls to keep attendees engaged

Pre-plan

- Facilitator agrees with the team on online tool to visualise and manage work (e.g. JIRA, Trello)
- Facilitator and team are provided with the right access and training to use the tool
- Facilitator send invites to participants with information to join the online meeting with link to the work management tool
- If there are no overlapping working times between time zones, this meeting might be repeated at different times to suit the different regions
- Confirm showcase do-ability and stakeholder attendance and put in calendar

Planning

- Facilitator
  - hosts the meeting in using the agreed video conferencing tool and mutes participants as they join in to keep the noise down and asks them to turn on video
  - presents the online management tool and asks team lead to share objectives
- Break down work to minimise handoffs between locations
- Take advantage of time zones to ensure progress of work around the clock
- Team commitments are recorded in the online tool

Post-plan

- Facilitator
  - shares documents presented during the meeting with the team members
  - shares link to online work management tool for people
  - schedules catchup checkpoints calls with individual team members to confirm everyone's is capable to use online tasks management, goal setting and milestone management tools

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Team engagement requires an uplift in communication

Communicate early and regularly to build engagement

Individual employees working from home crave information (due to loneliness) and regular communications helps staff remain engaged as they become conditioned to the habit of regular communications

Create an environment for remote workers to find answers and participate in training

Create a Frequently Asked Questions (FAQ) page for remote workers to find answers and training and use Slack or similar messaging tool to enable Ask Me Anything forums with stakeholders and product owners. Setting up times for a pre-prepared learning presentations whilst remote working e.g. remote 'brown bag' lunches shared via video conference

Set up one on one meetings

Create opportunities for frequent individual conversations to discuss firsthand business goals and prioritization. Continue regular career development conversations and offer feedback on work more frequently to drive continuous improvement

Favor video calls over email when remote working

Calls enable the most powerful tool of communication that email cannot: listening. Give the person you are listening to your most valuable asset, your attention. Listening to the remote workers experience demonstrates empathy and understanding

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Tips for making remote video calls more successful

Ensure all faces are seen and voices are heard online

- Maximise personal connections by having all participants turn on cameras during online meetings
- Encourage each person to introduce themselves at the start of the meetings
- Set reminders for meetings 10 minutes prior to start so attending check log ins and audio / video quality

Send all materials for meetings prior

- Use links to online materials to maximise security and online collaboration
- Ensure that links to materials requiring review are sent prior to the meeting to enable focus of the discussion
- Present materials using the video conferencing tools during the meeting to focus participation

Limit meeting durations < 1 hr

- Start the online meetings on time to change habits (note: travel between meetings is no longer an excuse)
- Have meeting participants introduce themselves to check audio
- Use a timer on any device to check time against the agenda, when the time is up, the meeting should close, immediately

Book meetings at suitable times across time-zones

- Create a shared calendar appropriate for multiple time zones
- Always set up meeting invites with agreed video link within the invite
- Preference the use of video over audio only (note lighting and environment setup tips)

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Use the right mix of tools that enables effective remote collaboration based on what needs to be done

Software Tools

Real time co-editing tools for seamless collaboration:

- Document storage and management systems that allow co-editing documents in real time provide better feedback and visibility

- Ceremonies and workshops require different collaboration tools depending on their purpose

Communication tools (aside from emails) for discussions:

- Video conference tools enable effective communication between team members when working remotely

- Chat channels allow for direct and more productive communication between team members

Physical Tools

- Multiple headsets and microphones exist for ensuring good audio quality

- External webcams can be used when built-in ones do not provide good video quality

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Tools that store, manage and allow real time co-editing of documents provide better feedback and visibility

SharePoint   Google Drive   Dropbox

Document Collaboration Tools

- Allow multiple people to edit documents simultaneously for faster feedback and better visibility of progress
- Provide a centralized storage that everyone can use to search for documents
- Manage the permissions to access certain documents to ensure privacy of sensitive materials
- Manage versioning and history of documents to be able to revert to old versions without sending multiple versions back and forth via email and losing track of the latest version

Tips

Check your document security access

To ensure security of documents is retained whilst remote working, provide precise access to subfolders to certain groups of people (e.g. leadership team, staff in certain regions) and check recipients permissions before giving them link access to sensitive files

Follow consistent structure and naming for fast retrieval

Maintain consistent folder structure and naming conventions to make it easier and faster for people to search for documents and find what they are after

Download mobile apps for mobile use

Download mobile apps for easier access to documents and co-editing when mobile

Set up alert notifications

To save team members waiting idly for their colleague to update a document, set up alert email notification. Alerts are sent when something changes in a document within a document library or list. A change in a list might be a change in an issues log, task list, announcement or contact list

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Multiple collaboration tools exist to suit the purposes of different workshops and ceremonies

Miro Board

Trello

Mentimeter
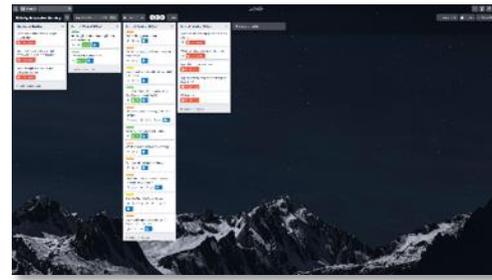
	Miro Board	Trello	Mentimeter
Purpose:	• Online collaborative whiteboarding platform	• Web-based Kanban style list-making application	• Interactive presentation software
Example uses:	• Story mapping • Polling • Sprint board • Team norms • Retrospectives	• Tribe wall • Sprint board • Kanban board	• Anonymous surveying • Polling • Retrospectives
Features:	• Able to integrate with JIRA and key apps (e.g. Microsoft Teams, Slack)	• Powerups and apps integrations for added functionalities (e.g. swim-lanes, story points calculation)	• Mobile friendly (no log in required) • Interactive questions and slides (e.g. word clouds, polls, Q&As) • Able to export results for further analysis

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Video conference tools enable effective communication between team members when working remotely

Video Conferencing Tools

Meet   Teams   Zoom   WebEx

- Video conferencing is an effective remote working communication method as it allows people to visually see other team members which assists with reading body language and emotion, compared to phone calls or written communication methods
- Requires strong internet connectivity and working microphone and camera
- Some video conferencing applications (e.g. Hangouts Meet, Microsoft Teams) come with benefits of integration with calendars to be able to send meeting invites with embedded links to video conferences

Tips

Join video conferences early to test

Make sure to join at least 10 minutes early to test video quality, connectivity and recording capability to ensure no technical issues occur when others join

Mute participants as they join

As a video conference host, you can mute participants as they join the call so that their microphone noise does not distract the rest of the attendees

Check mobile and web accessibility

Ensure that the video conference is set up correctly for relevant mobile, phone, web and desktop users to dial in/connect. Once again, test this beforehand!

Communicate training on how to use video conferencing software

Ensure you communicate with your employees all instructions on how to join the video conference. E.g. download mobile app, install desktop app, provide logins

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Variety of chat channels allow for direct and more productive communication between team members

Slack · Google Chat · Teams · Skype · WhatsApp

	Multimedia	Messaging	Call
Purpose	• Organisation-wide communication chat tool that supports file sharing and interaction with large groups of people • Used for inter and intra team communication for knowledge sharing, general updates and building team camaraderie	• Smaller team or 1on1 communication chat that is more direct and supported by most mobile devices • Used for important team updates particularly outside of office hours to ensure they are not lost amongst other channels	• 1on1 communication method which often has better quality and connectivity particularly when internet is not strong and secure • Used for high priority and urgent discussions or where it is too complicated to explain over a message
Tips	• Manage notifications and mute channels that are no longer relevant or are not high priority • Ask your teams to frequently update and customize their status so everyone knows their whereabouts and is informed frequently on their capacity to work • Use polls to do a quick 'pulse check' survey on your remote working team • Engage team by running quizzes with random prizes for cross-team socializing • Set up a 'shine-out' channel to call out great work	• Ensure that depository of employee's numbers are easily accessible when needing to create text groups or messaging an individual • Manage notifications and mute channels that are no longer relevant or are not high priority • Agree on reasonable times where an employee is expected to reply to messages • Agree on tone of language (formal or informal) to use when messaging	• Ensure mobile device is set to vibrate or sound on during work hours • Keep calls short and to the point • Agree on reasonable times where an employee can give or is expected to answer a call • Agree on individual's preference for calls or text when working in a new team • Have pen and paper at hand to record important actionable items or feedback resulting from a call

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Two popular types of headsets that improve remote working outcomes significantly

Directional Headsets

- The microphone targets the mouth of the user

- Provides excellent sound quality for the spoken word, although some noise can be heard in the background

- Often does not have noise cancelling

- Some models are built with specific technology aligned to conferencing solutions

- Available in wired and wireless solutions

Noise-cancelling Headphones

- Microphone and headphone work in combination to remove background noise

- Provide excellent sound quality over background noise

- In some situations, voice sound quality is diminished as it sounds like the person is in "a cave" due to noise cancelling

- Available in wired and wireless solutions

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Utilize scheduled and ad-hoc meetings to ensure continuous alignment and informal knowledge transfer

Schedule frequent check-ins

Daily progress check-ins ensure transparency of work and consistent realignment
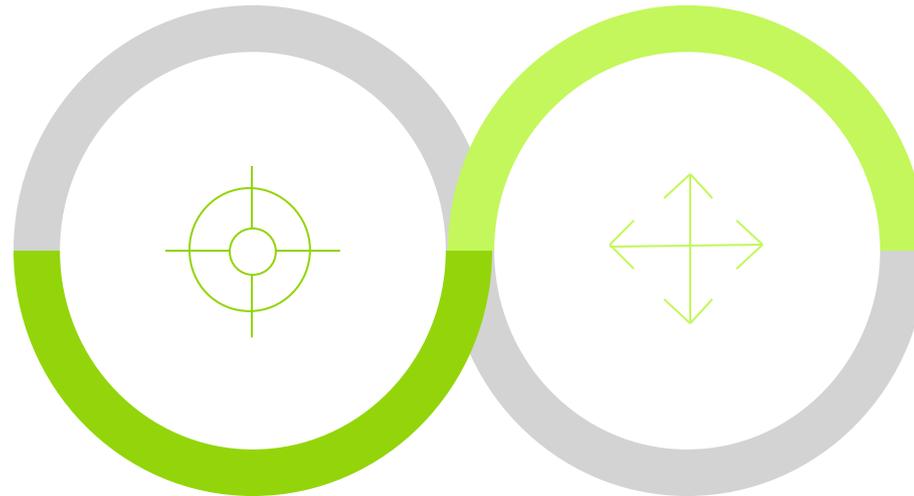
Allow for ad-hoc discussions

Use ad-hoc meetings as the equivalent of water cooler/corridor chats for informal knowledge transfer

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Daily progress check-ins ensure transparency of work and consistent realignment

Set expectations	Pre-check-in	Check-in	Post-check-in

Set expectations

- Regular progress check-ins set context for the work to be done to ensure transparency and accountability of work
- The check-in typically occurs on a daily basis, held in the same location and the same time so that it becomes a habit and easier for people to remember that this time is blocked for this purpose
- Regular virtual stand-ups are planned and calendared
- To accommodate for different time zones, a check-in might be repeated at different times during the day to suit the different regions

Pre-check-in

- Facilitator prompts team to update their work in the online work management tool prior to meeting
- Facilitator sends invites to participants with information to join the online meeting and link to the online tool
- If there are no overlapping working times between time zones, this meeting might be repeated at different times to suit the different regions
- Book rooms in every location, with video conferencing equipment where possible
- Agree on tools for frequent informal chat beyond meetings

Check-in

- Facilitator hosts the meeting and shares screen to present the work management tool
- Team members individually provide update
- No one else speaks but the person whose turn it is
- Keep the meeting time boxed to 15 minutes to stay on track and relevant

Post-check-in

- Team members update the online tool if not already complete

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Use ad-hoc meetings as the equivalent of water cooler/ corridor chats for informal knowledge transfer

'Wormhole' video conference

Random virtual coffee catchups

Purpose

A video conference that is always on (24/7) allows people from different locations and time zones to join and leave at any time to ask questions and receive fast responses in a face-to-face method

Short monthly virtual coffee catchups with a random colleague from around the globe builds rapport and strengthens ties between employees and offices in different locations

Tips

- Be ready to switch on camera when joining
- Set short and frequent times to join throughout the week to balance work and helping others
- Take lengthy discussions in a separate online meeting

- Allow people to opt in to be randomly paired
- Pair up people randomly on a monthly basis
- Allow for assigned pairs to schedule a 15-30 minutes catchup at a time that suits them
- Use informal chat channels to share pairings and screenshots of coffee catchups to keep momentum

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Gather feedback externally and internally to improve ways of working and deliver better value
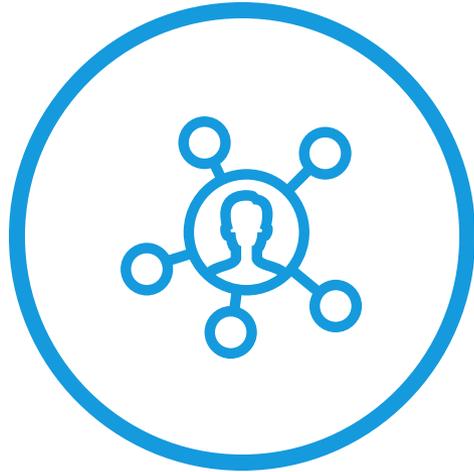
External feedback

Showcase work well online to celebrate delivery and get feedback from stakeholders and customers

Internal feedback

Regular team retrospectives and pulse checks surface actionable improvements for remote working

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Showcase work well online to celebrate delivery and get feedback from stakeholders and customers

Set expectations	Pre-showcase	Showcase	Post-showcase

Set expectations

- Plan what is possible with the showcase demonstration with the stakeholders and customers

- Make sure that stakeholders can adequately review the showcase materials and provide feedback online

- If there are no overlapping working times between time zones, this meeting might be repeated at different times to suit the different regions

- Additional benefits of remote showcases is that the entire team can attend the showcase and hear the feedback from the stakeholders and customers

Pre-showcase

- A practice run using online delivery mechanism is conducted prior to meeting including handoffs of screen sharing to ensure meeting is run efficiently

- Photos/video recording of functionality can be used when it's hard to demonstrate online

- Facilitator tests that sound and screen are captured when recording using the online meeting tool

- Facilitator send invites to participants with information to join the online meeting

- Book rooms in required locations, with video conferencing equipment where possible

Showcase

- Facilitator hosts the meeting in the right environment and mutes participants as they join in to keep the noise down and asks them to turn on video

- Facilitator records meeting with screen sharing and sound

Post-showcase

- Facilitator shares video recording with everyone

22

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Regular team retrospectives and pulse checks surface actionable improvements for remote working

Set expectations	Pre-retro	Retro	Post-retro

Set expectations
- The retrospective is where the team can reflect on what went well and what didn't
- The team has the opportunity to raise actionable items to improve on for the next iteration
- A pulse check enables an anonymous (if required) survey to be conducted to enable a more statistically relevant measure of team morale

Pre-retro
- Facilitator agrees with the team on collaboration tool that team will use to capture feedback anonymously (e.g. Mentimeter, Miro, Google Docs, FunRetro, TeamRetro)
- Facilitator and team are provided with the right access and training to use the tool
- Facilitator creates a new place using the collaboration tool to capture feedback for the upcoming event
- Facilitator sends invites to participants with information to join the online meeting and place in the collaboration tool to capture their feedback

Retro
- Facilitator hosts the meeting and shares screen to present the collaboration tool
- Team members individually contribute using the tool
- Facilitator prompts people to speak one at a time and switch on video
- It is recommended to NOT turn on recording to enable frank discussions

Post-retro
- Facilitator summarises improvements and shares with the team

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Next steps

Contact us at growth@adaptovate.com

- Start trying new ideas to improve your remote working and practice to get familiar with the tools. Practise for internal or less important meetings first as it will always be uncomfortable at first

- Continue to learn from others on how to improve your remote working. Follow ADAPTOVATE on social media and visit www.adaptovate.com to get the latest lessons or attend one of our training sessions

- Start the discussion with your team on how you can adopt or further enhance agile ways of working to accelerate the speed you can deliver

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