MODULE 1: Welcome and Introduce the Workshop

MODULE TIME: 31 minutes

SLIDE TIME: 1 minute

1. At the start time, formally welcome the participants.
   Welcome to our first virtual session for Leading Virtually. We are delighted that you are with us today. During our time together, you will learn skills that will help you be more effective leading virtually.

   FACILITATOR NOTE: There are 5 minutes built into the training design as a buffer IF NEEDED for tech issues or late arrivals. If possible, start on time.

2. Transition to the next slide—Your Presentation Team.
Workshop Purpose

PW Page 4

SLIDE TIME: 1 minute

1. Share the Workshop Purpose.
   
   Let's explore why we are here in this training today. The central purpose for this workshop is “To inspire you to lead your remote team members in a way that motivates them, creates alignment, and drives results for the organization.” This program focuses on helping leaders successfully transition from face-to-face to virtual or remote leadership. We explore the mind shift required, as well as the systems, work processes, and leadership practices that must change to lead successfully in the virtual world.

2. Ask participants to underline key phrases that stand out to them.
   
   Take the marker or line tool and mark the key words or phrases that stand out for you in the purpose.

3. Share a secondary purpose: To be a more effective virtual remote worker.

4. Transition to the next slide—Why Are You Here?
What Do We Mean by Remote Workers?

PW Page 4

SLIDE TIME: 2 minutes

1. Define “Remote.”
   *What do we mean by remote? Remote means one or more of these three working situations: 1) Anyone who works from home, whether that is full or part-time; 2) anyone who works beyond the office, such as someone on the road; and 3) anyone who works on a team with people who are geographically dispersed.*

2. Have participants indicate which definitions apply to them by placing a check mark next to the definition. They can have more than one check mark.
   *Make any observations about the remote makeup of this group.*

3. Transition to the next slide—How Remote Is Remote?—Distance.
The Reality of Working Remotely

PW Page 10

Slide Time: 2 minutes

1. Explore what remote team members might be thinking about the quality of their motivation.
   
   Let’s look at little deeper at what our remote team members might be thinking about motivation. The first column represents things they might be thinking if they are not feeling motivated. The second column is what you hope for as a leader when the quality of their motivation is high.

   Check the box if you think one of your remote team members might be thinking this.

2. Summarize responses.

3. Transition to the next slide—The Reality of Working Remotely.

<table>
<thead>
<tr>
<th>Motivation (negative)</th>
<th>Motivation (positive)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do I respond to the person on the phone or on the screen?</td>
<td>I am delighted that I could get this global project without having to move my family.</td>
</tr>
<tr>
<td>Never hear anything about how I am doing</td>
<td>Love working from home; I am much more productive.</td>
</tr>
<tr>
<td>Worrying about the company’s crisis</td>
<td>Always have time to spend on social activities.</td>
</tr>
<tr>
<td>Too busy to keep up with other work</td>
<td>Residents have time to spend on social activities.</td>
</tr>
<tr>
<td>I need to have the lead get all the recognition</td>
<td>I am so pleased to get a lot of that recognition.</td>
</tr>
<tr>
<td>Is someone working as hard as I am?</td>
<td>I am so pleased to get a lot of that recognition.</td>
</tr>
</tbody>
</table>
The Reality of Working Remotely

PW Page 10

Slide Time: 2 minutes

1. Explore what remote team members might be thinking about their feelings of isolation.
   Next, let’s examine what our remote team members might be thinking about regarding their feelings of isolation. The first column represents things they might be thinking if they are feeling isolated. The second column is what you hope for as a leader when they are energized by the autonomy they feel when working remotely. Check the box if you think one of your remote team members might be thinking this.

2. Summarize responses.

3. Transition to the next slide—The Reality of Working Remotely.

<table>
<thead>
<tr>
<th>Isolated (negative)</th>
<th>Energized by Autonomy (positive)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>I like being completely responsible for my success</td>
</tr>
<tr>
<td></td>
<td>I love being able to focus on this important work.</td>
</tr>
<tr>
<td></td>
<td>I can schedule my work time based on my energy level.</td>
</tr>
<tr>
<td></td>
<td>I appreciate that I do not have the distractions of co-workers, office politics, and the like.</td>
</tr>
</tbody>
</table>
Leading Virtually

Three Essential Practices for Leading Virtual Team Members

PW Page 13

Slide Time: 2 minutes

1. Introduce the three leadership practices.
   
   We recognize there are lots of challenges. The good news is that we know exactly what leaders of remote working employees need to do in order to overcome these challenges. There are three areas of leadership focus. These are called practices because the key for you as leaders is to deliberately choose how you interact with your remote team members. For example, instead of simply reacting to an email or a call, you need to actively consider the impact of every communication.

2. Discuss the three practices.
   
   Let us look at these three practices.

   Practice 1—Be Attentive and Mindful—Remote team members need to know you care. Attentiveness means knowing the goals, motivation, needs, and experiences of team members and recognizing when changes occur. Since working effectively in a virtual environment requires high levels of independence, leaders must consistently communicate their desire to connect with the personality and experiences of those with whom they work. If a leader does not make a habit of asking specifically about thoughts and feelings, others may not share their frustrations, successes, concerns, and needs. Without body language and observation, leaders have less data for diagnosing.

   Practice 2—Foster Community—Most of us are unaware of how much we connect to an organization and team by being on-site. We pick up cultural clues and norms by observing behavior, dress, language, behavioral norms, and communication patterns. Being on-site also fosters a sense of shared identity and community. Effective leaders work diligently to connect remote team members to the larger organization by actively facilitating collaboration, creating the team culture, and helping them unite to build community spirit.

   Practice 3—Accelerate Performance and Development—It is too easy to lose track of the development needs of people who work virtually. Leaders need to stay focused on all team members’ career and personal goals and find ways for them to develop. This increases satisfaction, builds loyalty, and creates a more valuable employee.

3. Comment on the bullet points under each practice.
   
   Under each practice are the habits that leaders of remote employees need to develop. The Survey of Essential Practices you completed during LAUNCH contains the specific behaviors leaders need to develop each habit.

4. Transition into the next slide—Break.
Let us dig deeper into the first practice—Be Attentive and Mindful.

Working effectively in a virtual environment requires high levels of independence. You and your team members are literally in your own world. As a leader, it is critical that you stay attuned to what your direct reports are experiencing. You must consistently demonstrate openness to hearing others’ thoughts and feelings. If you do not specifically ask for information, individuals may not share their concerns and needs.

Moreover, lacking the chance to observe body language, you have less data to know what they are experiencing and how they feel.

Being attentive and mindful is all about consistently paying close attention to what is going on with your team members.

Before we get into the specific habits, let’s take a look at the results of the survey you completed as part of your LAUNCH.
Leading Virtually Essential Practices

PW Page 14

Slide Time: 3 minutes

1. Remind participants of the survey behaviors regarding Practice 1.
   Let us review some specific behaviors for practice 1.
   Here are survey behaviors—numbers 1–8—that relate to this practice and habits.

2. Ask participants to share their answers from the survey using the check mark.
   Please put a check mark to indicate your answers from the survey.
   • Make comments as appropriate.

3. Solicit comments, questions, or examples.
   Are there any comments, questions, or examples related to these items?

4. Transition to the next slide—Be Present.
Be Present

PW Page 15

Slide Time: 1 minute

1. Introduce Habit 1 and define “present.”
   
   Habit 1 is to Be Present. What does it mean to “be present”?
   
   • Summarize responses

2. Transition to the next slide—Multitasking: The Opposite of Being Present.
Multitasking: The Opposite of Being Present

PW Page 15

Slide Time: 3 minutes

1. Define multitasking as the opposite of being present.
   Multitasking is the opposite of being present. Multitasking means doing two or more tasks at once that require similar parts of your brain, such as responding to emails while on a conference call or talking on the phone while driving. Walking and talking require different parts of your brain, so that is not considered multitasking unless the walking requires special thought.

   Of course, although some people dislike virtual meetings, some people just love them. Let's look at quote from an individual we interviewed to prepare this course.

   - Allow time for participants to read the quote.

2. Ask participants to raise their hand if they are guilty of multitasking on conference calls.
   Let's be honest. Raise your hand if you've been guilty of multitasking during virtual team meetings or conference calls.

3. Discuss the impact when we are NOT present.
   In the chat box, share the impact when we are not present—on people, the work, our reputation...
   - Expect responses such as
     Trust is reduced
     We miss out on important information
     Sharing goes down
     People disconnect

4. Transition to the next slide—Best Practices.
Best Practices

PW Page 15

Slide Time: 3 minutes

1. Have participants share their best practices for being present in team meetings, conference calls, phone conversations.
   
   *Pick up the text tool and provide some best practices for YOU to be more present in the left column, and in the right, identify the best practices you can do to help others be present in virtual meetings.*

   • Summarize and ask for clarification as needed.

2. Transition to the next slide—How to Be Present.
Working Preferences

PW Page 18

Slide Time: 10 minutes

1. Set up the breakout (4 or 5 per breakout group).
   • Remind participants to turn on their webcams during the breakout
   • Announce the timing for the breakout—8 minutes.

2. Start the breakout. After 8 minutes, end the breakout session.

3. Transition to the next slide—Working Preferences Debrief.
**Working Preferences Debrief**

PW Pages 18–19

Slide Time: 5 minutes

1. Ask breakout leaders to respond to the two questions on the screen.

2. Ask participants to raise their hand if they feel like they know these things about the majority of their remote team members. Encourage them to have these conversations about motivation and work preferences.

3. Transition to the next module and slide—Ask for Feedback.
MODULE 1: Provide Technology Support

MODULE TIME: 13 minutes

Provide Technology Support

PW Page 26

Slide Time: 1 minute

1. Introduce Habit 2.
   
   Habit 2 is about providing technology support. Do your team members have access to the tools they need? Do they know how to use them? Do you?

2. Transition to the next slide—What Tools?
Your Competence

PW Page 26

Slide Time: 1 minute

1. Ask how competent they are at the tools they use for remote work.
   
   *In general, how competent are you at using the major tools you need to work remotely with your team? Be honest: this is anonymous and there are no judgments here.*

2. Transition to the next slide—Impact of Low Competence.
Impact of Low Competence

PW Page 26

Slide Time: 3 minutes

1. Discuss the impact of low competence at using technology tools.
   *What is the impact when you (or your team members) aren't competent at using those tools? Raise your hand to respond.*
   - Ask participants to expand on their stories as appropriate.
   - Responses may include:
     - Delays in meetings due to technology problems
     - Being double-muted
     - Using more tools than necessary (e.g., teleconference bridge in lieu of Skype; everyone using the tool they are most comfortable with, even if they’re using different ones)
     - Frustration from team members who are more competent
     - Not using tools at all and increasing feelings of isolation
   - Comment on responses and include any of the responses above.

2. Transition to the next slide—To Provide Technology Support.
To Provide Technology Support

PW Page 26

Slide Time: 2 minutes

1. Share three things they can do to provide technology support for their remote team members.
   
   There are three things you can do to provide technology support for your remote team members:
   
   First, invest time in becoming competent yourself at the technology your team uses.
   
   Second, identify who on the team are experts in the technology tools and assign them to mentor others on the team.
   
   And third, provide training to the team on the technology solutions—formal training, knowledge sharing within the team, eLearning.
   
   • Solicit comments and questions

2. Transition to the next slide—Use Video to Foster Community.
Practice 3—Accelerate Performance and Development

PW Page 32

Slide Time: 1 minute

1. Introduce Practice 3—Accelerate Performance and Development.

   Because it is so easy as a leader to lose focus on individual performance and career development when individuals work virtually, our third practice for leaders is to Accelerate Performance and Development.

   As a leader, you want to make sure you are encouraging and supporting others’ career development.

   When we talk about accelerating development, we often think about changing jobs. But it is a sad situation when the only way an individual can grow on your team is to leave. Development in this context includes short- and long-term career development. Find ways for your virtual team members to develop in place; this will increase satisfaction, build loyalty, and make them more valuable.

2. Discuss the four habits for Accelerating Performance and Development.

   • Focus on output
   • Encourage self-reliance
   • Facilitate networking
   • Assist with career development

3. Transition to the next slide—Leading Virtually Essential Practices.
Leading Virtually Essential Practices

PW Page 32

Slide Time: 4 minutes

1. Remind participants of the survey behaviors regarding Practice 3.
   
   Let us review some specific behaviors for practice 3.
   
   Here are survey behaviors—numbers 17–24—that relate to this practice and habits.

2. Ask participants to share their answers from the survey using the check mark.
   
   Please put a check mark to indicate your answers from the survey.
   
   • Make comments as appropriate.

3. Solicit comments, questions, or examples.
   
   Are there any comments, questions, or examples related to these items?

4. Transition to the next activity and slide—Focus on Output.
Virtual Coaching Conversations

PW Pages 36–37

Slide Time: 3 minutes

1. Ask participants to review pages 36–37: How to Conduct a Virtual Coaching Conversation, looking for questions to help the individual with the performance problem in the case study we did at the beginning of this session.

   Remember the case study we reviewed at the beginning of the session—the Performance Problem. Take 2 minutes to review the job aid, How to Conduct a Virtual Coaching Conversation, specifically looking for questions you could ask to help this individual become more self-reliant.

2. Transition to the next slide—Performance Coaching.
Module 8: Final Action Planning

PW Pages 43–46

Module time: 15 minutes

Final Action Planning

Slide Time: 10 minutes

1. Set up action planning activity.
   
   So, now what? What have you learned during these three sessions, and how will you apply it back in the real world to help you be a better virtual leader?

   You will see some tips for each of the practices on pages 44–46. Take some quiet time to review the material and answer the questions on page 43. Please do not shortchange this final activity, as it will help ensure that you follow through on some of your commitments. Raise your hand when you are done with the action planning.

2. Conduct the action planning.

3. Transition to the next slide—Honorable Close.