

Communicating in the Virtual Workplace Checklist 272



Introduction

In today's world of international business, flexible working practices, and cutting-edge technologies, virtual working is a common scenario in organisations across the world. The benefits afforded by virtual working are many and varied - for the organisation as well as the employee. Yet such remote working is not without its challenges.

For managers responsible for overseeing employees who are located at a different site, in a different region or even a different country from their own, there are various issues to be addressed, with communication being a key element which it is vital to get right. Managing from a distance requires a different approach to communications, with an emphasis on clarity and transparency.

In a physical working environment much of what we learn from our colleagues is gained through observation. We see how they work and get a sense of their attitudes and expectations and the meaning of what they say through facial expressions and body language. However, such visual 'clues' are not available to colleagues who work remotely. For this reason it is vital for managers to set clear expectations and to pay attention to communicating organisational values, goals and culture as well as everyday messages and information. Getting key messages of this type across to colleagues whom they may never have met in person is a challenge which managers need to find ways to overcome.

The absence of physical managerial contact when team members are remote or dispersed makes the development of trust even more vital if objectives are to be achieved and targets met. As well as being an effective communicator, the virtual manager needs to be adept at collaborating and coordinating their team in order to develop those all-important trusting relationships. This checklist provides pointers for managing a virtual workforce with a particular focus on clear communication.

Definition

A virtual workforce consists of an employee or employees who are based in a different physical location from their manager, or dispersed in a number of different locations. This may be those working in different parts of a single building or site, but more commonly involves: those who work from home for some or all of their working hours; mobile workers operating in the field; those working in outsourced teams; or those working at a different site, either within the same country or abroad.

Action checklist

1. Establish the dynamics of your workforce

In order to adopt the most effective means of communicating and to tailor your approach according to the context, the first step is to consider the dynamics of your team and to identify what the specific needs of team members may be. Virtual working covers a range of different scenarios and working environments, so the needs of your team members will be varied and complex. Those who have no direct face-to-face

exchanges will encounter different challenges to those who have occasional contact. Issues can range from poor IT or communication skills, cultural or language barriers, difficulties of location and time, identity issues, and feelings of isolation. All such concerns need to be assessed and addressed on a one-to-one basis. Be aware that the same solutions may not suit all your team members, even those who are facing similar challenges and try to find ways of meeting individual needs. Where skills gaps are identified, take a proactive approach to provide informal or formal training.

Be mindful that the team dynamic can be very fragile. Relationships amongst team members take longer to establish when colleagues rarely, if ever, see or speak to each other in person. A new employee joining the team or someone leaving can have a much greater impact than when this occurs in a physical workplace. So be patient and be prepared to allow time to re-build your team once the balance has been disturbed.

2. Understand the working environment

As a manager, it is important to be mindful of the fact that the environment in which your employees work may be very different from your own. Location has a significant bearing on your ability to communicate with colleagues effectively and frequently. If they are based overseas, language barriers and time differences come into play, as well as connection costs and the availability of technology. If employees are operating on the move, from a car, train or plane, for example, your choice of communication methods and the timing of your messages will be affected. If your team members are mobile, you will need to reach some agreement on how you will know when they are available and how you can get hold of them when necessary.

When colleagues are in a public place where they can be over-heard or interrupted this can cause difficulties, especially when you need to discuss personal or sensitive information. Background noise can be an additional problem. Access to reliable technology, support and connections to phone and internet networks may be compromised if recipients are travelling around, or based in a location with poor connectivity. Being aware of these issues will enable you to put contingencies in place and avoid the frustration of being unable to contact a colleague when you need to.

3. Build the team and create a collaborative workforce

Relationships evolve organically when team members work side by side at the same physical location and, in time, with the help of a good leader, the team begin to bond and develop a sense of common purpose. Remote workers, however, may never actually come into contact with their colleagues, so you will need to devise ways of bringing lone or dispersed workers together to communicate with each other as well as with you. Provide opportunities for the team to come together virtually to share ideas, opinions and progress reports. Ask workers to explain what their key roles are and what they are currently working on.

Audio and video conferencing are effective ways of bringing a virtual team together and getting everyone to communicate. Seeing what someone looks like on a screen or even just hearing their voice can help to aid recognition and familiarity. Consider reinforcing this by circulating employees' photographs and full contact details, if appropriate.

Make it clear that team members will have to communicate with each other in order to get the answers they need. Investigate the use of collaborative technologies such as shared databases, wikis, intranets, and cloud-based work platforms to encourage the exchange of knowledge, information and ideas. By creating an environment conducive to group collaboration you effectively give workers a group identity and a sense of belonging. Collaboration is achievable when everyone is working towards a shared goal, irrespective of their status, background or working environment. Collaborative working underpins good internal communication so dedicate time to getting this right.

4. Reinforce organisational practices, values and behaviours

In a physical workplace, an understanding of organisational policies and practices covering matters such as etiquette, dress codes, acceptable and unacceptable behaviours, appropriate use of humour, and when and how to interact with senior members of staff can be gained by simply observing others. Newcomers quickly learn about an organisation's culture and politics in this way. However, virtual workers frequently lack such visible social clues to inform or prompt them. Electronic communications can also lend a degree of anonymity, which leads people to say things that wouldn't be deemed appropriate in a face-to-face exchange.

It is therefore, the responsibility of the manager to communicate the organisation's policies, values and accepted behaviours explicitly and to ensure that they are followed. There need to be set guidelines for acceptable behaviour so that people know what is expected of them. These should be clearly communicated, documented and acted upon by all concerned, so that organisational standards are met. Any deviation from or disregard of guidelines should be addressed promptly. Be very clear about what you expect of your employees and what they can expect from you in return. Take every opportunity to reinforce the messages through your own behaviour - adopting the right form of address in emails, always arriving promptly for virtual meetings, and showing respect for the opinions of others. Shared behaviours, values and policies help to create a collaborative and cohesive workforce all working to the same high standards.

5. Gain, build and maintain trust

It's vital to gain, build and maintain trust with all members of your team if they are to remain engaged and motivated at all times. Trust can take time to build, especially when you don't have the benefit of meeting face to face, so it's important to maintain regular contact. Employees need to know you are available to support them and deal with queries when necessary and that the distance between you is purely a physical one.

Avoid sending only group communications and make an effort to communicate with individual team members. Ask how they are, rather than making contact simply to check up on a task they have been set. Depending on the context, a casual email or exchange of pleasantries that isn't solely about work can help to strengthen a trusting relationship.

Be as transparent as you possibly can – in your communications, your expectations and your requirements. This will enable trust to develop and allow uncertainty to be eradicated. Managing from a distance limits your ability to exercise control, so you need to be in a position to trust your team members to keep on track and fulfil the responsibilities allocated to them. Show that you have confidence in their ability and trust them to work without constant supervision or control.

6. Provide, and seek, regular feedback

Be sure to provide regular feedback on the performance of each member of your team. A yearly appraisal may not be the most appropriate means of assessing and discussing the performance of a virtual worker. A year is too long for problems go undetected and fester. Aim to give feedback and provide each worker with the opportunity to discuss their progress with you on a regular basis.

As well as providing feedback on performance, it's also important to keep track of progress and enable employees to make adjustments as necessary. Request regular progress updates as a means of managing the workflow and to maintain a degree of managerial control.

Give workers the opportunity to provide feedback on how projects are developing, choosing a suitable method of enabling them to do this. It can be helpful to set up an open forum where team members can share ideas and discuss problems together, as well as a closed communication channel, where individuals can share sensitive or private information in confidence. Asking for the opinions of all the team will do much to increase engagement and make lone workers feel more supported and less isolated.

Feedback is a two-way stream so it's important that you seek opinions from your employees as to how they feel they are being managed – the things that are working and not working from their perspective and what they need from you. Encouraging feedback will help you identify any concerns, as well as adapting your own practices and approach to better suit their needs.

7. Give recognition and reward where deserved

Motivation and engagement can be greatly enhanced by judicious use of recognition and reward – both for team projects as well as individual achievements. Consider the best way to reward your team members for a job well done. This might be a mention at an all-staff briefing; a dedicated piece in the company's newsletter or Intranet pages; or a financial incentive for those working on a commission basis, for example. Each organisation will have its own formal methods of recognising and rewarding team and individual performance, but adopting a few informal means of commending people for a job well done will do much to strengthen your relationship with your team. Choose the most appropriate method to communicate achievements; being sure to credit individuals by name.

8. Monitor productivity on a regular basis

Managing and monitoring the productivity of a virtual workforce can represent a challenge. If every task you set has a month's deadline attached to it, it will be difficult to assess whether workers are productive all the time or simply working around the clock a week before the deadline is due. Setting varied tasks and deadlines helps to keep workloads manageable for yourself as well as your team and ensures that you are constantly in touch with each other.

It is also important to recognise, and act upon, underperformance. Failure to meet targets, missed deadlines, absence, or late arrival at virtual meetings may indicate that an individual is struggling to cope with their workload or indeed has become disengaged. Both are serious issues which need to be dealt with promptly. Although many indicators of disquiet are obvious when you are working alongside a person face-to-face, body language and tone of voice, for example, unease is harder to detect when you don't interact with your employees face to face. This is why regular contact is so important and why it is vital that connections are established and maintained. Building good working relationships and trust helps to ensure that you are kept in the picture at all times and can make allowances for circumstances which are beyond the control of your team. If you have to deal with a serious matter, think about the best way to approach this and choose the time and channel of communication with care. Bear in mind that some forms of electronic communication are regarded as informal; in some cases adopting a more traditional means of communication, such as a written letter, may be more appropriate.

9. Put in place the right technology and training

Virtual working and virtual management rely heavily on technology including e-communication and social media platforms. If communication is to be effective, you need to ensure that all technology and software in use is fully supported. Equipment needs to be up-to-date and fully operational; mobile phone reception, broadband and connections should be available at acceptable levels; and all members of the team need to be able to access to the same technology at the same time. Frustrating interruptions caused by technical faults or bandwidth problems can swiftly disrupt a virtual meeting. Be prepared by checking that everything is fully operational before a meeting and encouraging participants to do the same.

As well as ensuring the right technology and IT support are in place, it's also crucial for all employees to receive training to equip them with the skills they need. Be aware that remote workers may not have any IT support onsite or close by, especially if they operate from home, and try to make sure that no one in your team is at a disadvantage where technology is concerned. Ask your employees to complete an assessment questionnaire and/or undertake a skills audit so you can accurately assess which employees may need training or additional support. Make arrangements to meet any training needs you identify and ensure that the training is undertaken promptly. Similarly, any skills gaps you identify in your own knowledge should also be addressed.

10. Evaluate e-communication methods

Remote communications are enabled by a range of different technologies and software programmes. When considering which are most appropriate for your use, think about the content and context of the information you want to deliver. Options include:

- telephone conferencing
- video conferencing
- online meeting platforms
- discussion forums
- email
- social media
- intranets
- webinars.

Each method of communication has its own merits, as well as pitfalls, so give your choice due consideration before making a selection. Consider the following factors:

- How formal or informal does the communication need to be?
- How large or small is the group you are communicating with?

- Do you and your team possess the requisite technical knowledge and is the necessary equipment available?
- Do you require instant responses to a message?
- Are participation and interaction important?

In a physical working environment, these means of communication are often used as adjuncts to face-to-face communication. In a virtual one, the rules for using them change as they become the primary means of communicating. Think about how to adapt your use of these technologies and encourage co-workers to do likewise.

11. Ensure clear and detailed communication at all times

Whichever communication method you choose remember that without visual clues the need to communicate fully and clearly is paramount in a virtual context. It is easy for messages to be misunderstood and misinterpreted when communications are sparse. Communication needs to be clear and transparent, yet also much more detailed than might be necessary in a face-to-face exchange. Supplying additional or background information is therefore a must. You also need to invite feedback explicitly, so that recipients know when to respond and when to listen. Be sure to give delegates the opportunity to seek clarification and ask questions – either during a virtual meeting or afterwards. When complex tasks are involved, it is important to provide guidance notes to reinforce what has been communicated, discussed and agreed.

Additional challenges arise when communicating with colleagues whose native language or cultural background is not the same as your own. Language barriers can prevent your message from being understood so it's essential you are fully aware of the level of written and spoken language skills of everyone within your workforce. Levels of ability may vary amongst your team so if you notice the same individuals doing all the talking in group meetings check that the silence of others is not on account of a lack of understanding. Test this by addressing direct questions to named individuals. Familiarise yourself with the cultural expectations of team members from varying backgrounds and do all you can to encourage interaction and participation.

Managers should avoid

- ambiguous or infrequent communications
- assuming that everyone in the team has the same needs
- using inappropriate technologies
- failing to provide feedback on performance
- forgetting that virtual workers require instruction and guidance.

National Occupational Standards for Management and Leadership

This checklist has relevance for the following standards:

Unit DB6 Support remote/virtual teams

Unit DB5 Manage team communications

Additional resources

Books

Manager's guide to virtual teams, Kimball Fisher and Mareen Fisher

New York NY: McGraw-Hill, 2011

This book is available as an [e-book](#).

Managing virtual teams, Debbie DuFrene and Carol M Lehman

Business Expert Press, 2011

This books is available as an [e-book](#).

Virtual team success: a practical guide for working and leading from a distance, Darleen M De Rosa and Richard Lepsinger

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San Francisco Calif.: John Wiley, 2010

This is a selection of books available for loan to members from CMI's library. More information at:
www.managers.org.uk/library

Journal Articles

Only a click away: what makes virtual meetings, emails and outsourcing successful, Karin S Moser,
CMI Management Articles of the Year, 2013

Working together, apart, James Mankelow
Training Journal, November 2012, pp 57-60

Leading virtual teams, Arvind Malhotra, Ann Maichrzak, Benson Rosen
Academy of Management Perspectives, Fe 2007, vol 21 no 1, pp 60-70

Related checklists

Ensuring clear communication (200)
Managing internal communication (270)
Communicating across cultures (271)

This is one of many checklists available to all CMI members. For more information please contact

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