Section 2

Tips for Managers of Teleworkers

MANAGER

Managing teleworkers or being the teleworking manager of onsite employees is not truly that different from managing employees when everyone is onsite. You still need to provide goals, resources, sponsorship, evaluation, constructive feedback and other essential supports regardless of where you and your team are located. What is different is the need to plan out how you will deal with a few important logistical issues and stay informed about how work is progressing so you can keep things on track. The good news is that many of the skills you practice managing teleworkers are valuable for all your employees and you may find that the additional effort you expend setting up a positive telework experience will result in less work overall and new ideas on how to better manage your entire team.

The following list of tips are broken into five sections, each one focusing on a major question commonly asked by managers seeking to reinvent not just where their teams work, but how they will all work together to get the best results from telework.

It is okay to be wary of telework, especially if it is new or you've had a bad experience with it in the past. Use your doubts to make it better, ask hard questions and work out details; your experience and your team's experience will be better for it.

- Who can telework and how much?

- How should employees apply for telework?

- How do I stay in touch with my remote team members?

- How do I make sure the work gets done?

- How do I handle performance problems among my teleworkers?

Before you go through this Guide, it is important to take a moment and be honest with yourself about your attitudes toward telework. Do you think it's a boon to your team's productivity or an indication of a lack of commitment on the part of teleworking employees? Are you worried that people will take advantage or even lie about their work progress until it is too late to fix things? It is okay to be wary of telework, especially if it is new or you've had a bad experience with it in the past. Use your doubts to make it better, ask hard questions and work out details; your experience and your team's experience will be better for it.

On the other hand, if you think telework is the best thing since sliced bread, take a moment to consider whether you have thought about the new ways you will have to manage and communicate with people. Your optimism will inspire others, but make sure to temper that optimism by planning around what might go wrong and how to handle it. When Murphy's Law (the adage that anything that can go wrong will go wrong) rears its head and something eventually does go awry, you'll be better prepared to resolve it.

Who Can Telework, and How Much

Processes for deciding who can telework should be focused on jobs.

Overall eligibility for telework should be based on whether a particular *job* can be done offsite, and that process should be as transparent and consistent as possible. It can be tempting to restrict telework to successful employees you already trust. However, basing telework eligibility on job tasks rather than personal characteristics and performance has two major advantages. It:

- reduces the chances that managers will grant access unevenly and your resulting vulnerability to claims of unequal treatment; and

- allows you to use telework as a performance improvement tool for employees who need flexibility in order to be successful.

If a job can be done remotely by one employee, then the option to telework should be available to all employees *with the same responsibilities.* For some jobs, this will mean just a few hours of telework eligibility, while others may work remotely for one or more days. Make sure the process and criteria you use to make your decisions about who teleworks are written down and applied consistently, and that there are also fair and equitable processes in place to determine whether an employee is succeeding in using telework.

> **Allowing employees access to telework based on their job descriptions is not the same as allowing them to all telework or to telework at the same time or in the same way.**

Allowing employees access to telework based on their job descriptions is not the same as allowing them to all telework or to telework at the same time or in the same way. If onsite coverage is necessary for specific jobs, then you and your team need to set up telework schedules that make sense for the business. Perhaps employees will alternate their telework days, or some will telework in the morning and others in the afternoon. You may need to work with employees to set up a system for determining how schedule conflicts will be resolved. For example, if two employees want to telework when one of them needs to be onsite, will you use seniority, reason for telework, a mutual decision-making process or some other system to make determinations?

This doesn't have to mean more work for you. Once you have set up a system, you can leave it to the employees to negotiate telework schedules according to that system and just require that you approve the final schedules. Employees will appreciate the opportunity to manage their own schedules, and you will have more time to do your own job.

Remember that employees are responsible for their performance wherever they work, and you retain the right to make changes as needed to support your team and the organization's goals.

The goal of a broad approach to telework eligibility is to let employees identify work arrangements where they do their best work rather than restricting telework to those who have already succeeded with onsite work.

Occasional, Regular or Full-time Teleworker?

Deciding whether a position can function as a full-time remote position can be a complex task. In general, telecommuting and teleworking positions have the same characteristics, but telecommuting positions have a greater degree of those characteristics. Four of the most essential characteristics to consider are:

- **Do job tasks require onsite only resources?** In other words can the job be done at a remote computer or workspace?

- **Is walk-in customer service a primary responsibility?** Is the employee required onsite to deal with unscheduled, onsite appearances by clients or management?

- **Does the employee have sufficient independent access to information?** Can the employee get or request essential information, including feedback on their performance, when they need it?

- **Does the position have sufficient autonomy to work remotely?** In other words, are employees trusted with the responsibility to make day-to-day work decisions without frequent check-ins with onsite management?

Remember that employees are responsible for their performance wherever they work, and you retain the right to make changes as needed to support your team and the organization's goals.

There is no clear rule on how much of each of these characteristics is required to draw the distinction between occasional, regular and full-time telework. It is okay to experiment and see what options work and how to tailor them to specific jobs and employees so that it works for everyone, including you. Just make sure everyone involved understands the experimental nature of the process and that experiments can be terminated at any time for the good of the business.

**Change at a pace that makes sense for you, your team and your organization.**

For some managers, this broad approach to telework is too much of a good thing, too soon. If you are one of them, know that it's okay to go with a more limited start to telework. A couple of things that can make telework feel more manageable to all involved are:

- stating explicitly that arrangements are considered on a case-by-case and individualized basis;

- stating explicitly that the organization reserves the right to discontinue telework arrangements at its discretion;

- maintaining a standard timeline for ongoing reviews of telework arrangements where changes can be made for the benefit of all involved;

- creating pilot programs or test periods with defined end dates, benchmarks for success, and the option to renew if all parties agree and the benchmarks are achieved;

- restricting telework to certain days, tasks or meetings where everyone is comfortable with telework; or

- requiring full-time teleworkers to work onsite for a period of time to form essential relationships, learn how the organization functions or for other specific business reasons.

Remember that test periods enhance performance when they are created by establishing a baseline for an employee's skills, relationships or knowledge. Test periods without such specific measurable goals just serve to redefine telework as a perk that has to be earned rather than a business strategy to be used as needed to maximize performance.

There are many options for setting a comfortable pace for an evolution towards telework, and you should remember that you have the right and responsibility to make sure telework is executed in a way that works best for all stakeholders. Eligibility for telework does not equal a right to telework on demand without open and consistent coordination, accountability and measureable outcomes.
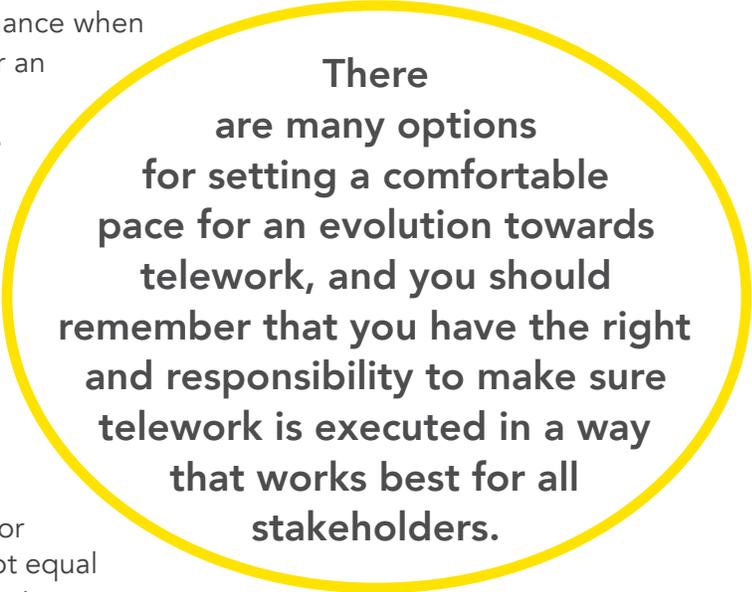
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How Do I Stay in Touch with My Remote Team Members?

Provide the right resources.

Review the communication options at your organization. Email, phone (voice and text), instant messenger, video conferencing and occasional in-person visits are all ways to stay in touch with remote employees. Before you decide that an employee should telework, make sure you and everyone else who works with that employee is prepared to use the best options for communication. Remember that when an employee teleworks, everyone needs to enhance his/her communication and technology skills, not just the teleworking employee. Pursue the best resources for your team and voice your support for using richer media, like video conferencing, so everyone realizes that *the team* is expanding its communication options and skills. A number of these resources are free or very low cost (though sometimes with limited options). Take some time to identify exactly which functions your team needs and sources of those options for little to no cost. Emphasize that this isn't simply to accommodate the remote employee, but to improve overall functionality and create flexibility options for everyone.

Set expectations early.

As a manager, employees will be looking to you to understand what their telework situation should look like. Make sure you have an explicit conversation with your whole team (both teleworkers and those working with them) about the following:

Availability and Responsiveness

When do you expect employees to check their email or answer their work phones? How quickly do you expect a response to an email or a voicemail? Are there blackout times when employees can separate from their work or devices to focus on personal/family matters? How should employees signal when they are going to be unavailable, and under what circumstances? For example, do you want an email when employees come and go from lunch or have a work meeting at a client's office?

TO CALL OR NOT TO CALL: IS THIS AN EMERGENCY?

Important tasks have significant effects on your overall work outcomes.

Urgent tasks are time sensitive and need to be done relatively soon if they are to be done to best effect, but the results may or may not be significant.

Tasks that are:

- *just important* need to be done, but there is still enough time to do so without disrupting normal operations;

- *just urgent* may need to be done soon, but probably aren't worth the cost in resources and morale to disrupt normal operations; and

- *both important and urgent* are worthy of disrupting normal operations and calling someone during their off hours.

However, urgent tasks can create feelings of stress that give the impression they are important. Being able to know the difference between tasks that are one, both or neither of these things is essential to proper prioritization.

How should your team members — both those who are teleworking and those who are not — cover for each other?

Data Security

What systems does the employee use? Are there confidential data on those systems? Who else has access to the employee's offsite workspace and computer? Is it running the right anti-virus programs? How should files be moved around: via email or through a shared server? Use the resources your organization provides — such as your HR and IT departments or other experts — to ensure that teleworking employees properly manage data.

Coming into the Office

Are all onsite events (meetings, presentations, trainings) mandatory? Will you tell telecommuters which ones to attend or should they use their discretion? If an employee teleworks full time from far away, will the organization cover costs for onsite visits? If the organization covers travel costs, how many visits are covered, and under what conditions is a visit covered? For example, do full-time teleworkers need you to request their presence or can they initiate a visit on their own? If a full-time teleworker visits the workplace, where will they sit and work while onsite?

Emergency Onsite Requirements

Sometimes an employee will be scheduled to be remote but be required to be onsite for a critical situation. When that happens, is the offsite day lost? Or does he/she get another in its place? How much notice can an employee generally expect before being called in?

Spontaneous Meetings

If a spontaneous meeting is called, how will you make sure offsite employees are suitably involved? How will such meetings be conducted (in-person only, phone calls, video chat, instant messenger, texts on a smartphone or some combination of methods)? Will you contact the employee for the meeting, or should he or she call into the meeting? Who will be responsible for this coordination?

Technology

Do you have the right level of communications technology to stay in touch the way you need to? Would collaboration programs or richer communications tools enhance your work together? Should your team get a training session on how to use the new technology so that everyone is proficient in it? Is all the technology in working order and properly maintained so that you can rely on it on short notice?

Be strategic about how and when you communicate.

The most essential aspect of managing a teleworker is to stay in touch despite the distance. This includes calls when you need something in the moment, regular check-ins even when there is nothing pressing, and general social contact to build trust and collaborative relationships.

The following tips describe different ways to maintain contact to best effect for each of these three types of communication. No method of communication is bad, but phone, email, texts, instant messenger and other options each have their own strengths and challenges and should be used strategically based on the situation.

Immediate Need

Email is a poor communicator of urgency. Most email alerts are set up so that there is no way to distinguish between a piece of junk mail and an email from an angry client. As a result, employees are forced to check email constantly, creating a sense of always being "on." Establish with your team, coworkers and clients clear times when email should get a quick response and when it is appropriate to let something wait till the next day. Draw a distinction between items that are urgent, important, both or neither. Items that are both urgent *and* important should generally be communicated by phone calls, not email. If you need to send urgent information in an email, use a phone call or at least a text message to draw their attention to the email. If you use email or text messages to convey urgent information, include an explicit request for a response, so you know that your message has been received and the employee is taking appropriate action.

On the other hand, texting and email can be useful alternatives to a tap on the shoulder for getting the attention of a teleworker who might be in a phone conversation.

If something important is missed because it was sent by email, remember to base your response and any corrective action on whether or not the people involved followed the agreed-upon protocol. If you find that the protocol didn't work as well as expected, you can address that, too.

Ongoing Strategy and Logistics

If a sensitive situation emerges — where you or someone else may have a strong reaction to something that took place — avoid email discussions. Request a phone or video call to add greater depth to the dialogue. Do this for both positive and negative news. It will give you the opportunity to head off misunderstandings around bad news. For good news, a call is important to let employees know that you see the connection between them and their good work. Sending a follow-up email with the resolution of your conversation further cements their contribution onto the official record and will make it easier to do performance evaluations later.

Social Connection

Plan around the social aspects of work activities. If you are having a meeting where teleworkers can meet new people (such as leaders who might advance their career and other teleworkers), invite them to that event, so it is clear that they are important members of your team. Use richer communication media for your work interactions, like video chats and phone calls. Interacting with you in real time where they can see your facial expressions or hear you laugh at a joke will be more rewarding than the same exchange on email and help keep them connected to you and the organization. Have regular contact via email or phone calls even if there is no pressing business to discuss. A regular five minute check-in can provide a strong foundation for the relationships you will need to manage the opportunities and challenges facing your team.

Create a strategy for fostering teamwork and collaboration.

The ability to collaborate and share ideas to foster innovation is an essential ingredient of success for many organizations. It is reasonable to fear that telework will disrupt that collaboration and hurt performance. Yet, if telework is managed strategically, it doesn't have to suppress collaboration and may, in fact, *improve* collaboration. Keep the following things in mind when you are looking for collaboration in your team, and you should find that information sharing and idea generation remain high despite a dispersed team.

Help people be clear about what they mean by collaboration.

People can confuse a feeling of satisfaction with a conversation with the quality of ideas exchanged. Face-to-face meetings are a richer source of social exchange including body language, tone of voice and facial expressions. These forms of social exchange enhance people's sense of connection to the conversation and their colleagues. People can have a very productive virtual collaboration and still feel unsatisfied compared with face-to-face conversations.

Ask your team and colleagues — who claim that there is a lack of collaboration — what good ideas and/or essential information isn't getting shared properly. If they can't point to identifiable gaps, try using a richer communication medium for your next collaboration event. If you are using email, ask for a phone call. If you are using phone calls, try a video conference. Use the communication medium that people feel most secure with, even if it takes a little more effort. People will be more responsive if they feel like the conversations are fruitful, even if productivity is objectively the same in virtual and in-person meetings.

Have kick-off meetings in person.

Research has shown that teams that start out in person and then switch to virtual communication methods have very similar results to those who meet in person all the time.[34] The key is to have the most complex and group forming meetings in person. Then, as people switch from generating ideas to implementing them, the need for in-person meetings will decline, and regular, virtual communications will do just as well.

Diversify the way you brainstorm.

The standard vision of brainstorming meetings is a bunch of people in a room calling out their ideas and one person frantically trying to jot it all down on a flipchart. That kind of brainstorming tends to bury the ideas of quieter people who take longer to verbalize their ideas or who are low on the organizational hierarchy. Yet, since everyone was in the room and there were lots of voices calling out ideas, people tend to feel like collaboration took place.

To capture more ideas — especially from unusual suspects — try including some virtual brainstorms. Get everyone on a video conference program with a chat window. That allows more extroverted people to speak and be heard, while more introverted people can listen to others speak and get their ideas on the written record without having to fight their way through the conversation. The facilitator should monitor the chat window and carve out space for the less forceful speakers to elaborate on their ideas. This ensures that less vocal speakers will have something constructive to say when the facilitator gives them the floor.

It may take a few tries to get a good rhythm going, but there are a number of reasons to develop virtual brainstorming skills beyond just conquering distance. Virtual brainstorming allows opportunities to do anonymous brainstorming where people can offer unconventional ideas without fear of ridicule or reprisal. It also helps with brainstorming in large groups where there are too many people to equitably share air time.[5] Fully virtual brainstorms (as on instant messenger) benefit from having a record of all ideas and their originators without relying on a human transcriber.

How Do I Make Sure the Work Is Getting Done?

Review how you already communicate with and evaluate staff.

A common question managers new to telework have is: "How will I know they are working?" But, before you answer that question, answer this: "How do I know they are working now?" Unless your employees are making widgets, just because you can physically see someone doesn't mean that you know what they are doing. Informal conversations in the hallway, while easy, are not reliable substitutes for the more formal check-ins on work progress that are necessary to keep your team's work on track. Employees in the office may still spend lots of time on Facebook or other social media, and not every problem will surface before it becomes a major issue. If you don't have regular opportunities to communicate with your team, hear how they are doing and what they need to be their best, then you will have problems whether they work remotely or not. Look to concrete measures of performance such as products made well and on time, comments from coworkers and clients praising or complaining about the employee, the frequency and quality of ideas they contribute in meetings, etc. If you do this for all your employees, you may be surprised by what a direct comparison of work outcomes among your teleworkers and onsite employees reveals.

Evaluate performance regularly.

Don't wait for your team to tell you if the telework situation is working for them and the organization or not. In general, employees do not take the time to point out things that are going well and according to plan. They also tend to avoid mentioning small fixable problems until they have expanded into larger problems with a lot of negative feelings built up. Making a commitment to more frequent check-ins will help to keep you in the know about an employee's performance. How often you should check in depends on the difficulty of correcting problems as well as the potential consequences of a problem — though once a week is a good rule of thumb. More frequent check-ins are needed when an employee's work has the potential to cost significant resources (e.g., money, time, social capital, etc.) to fix if a problem emerges.

During check-ins you should review whether:

✓ Things are going well on a teleworker's projects and if there are any changes that would make things better.

✓ Coworkers and clients are receiving the service they need from your team and what would make things better.

✓ The teleworker's assignments are being met with quality and timely delivery.

✓ Your technology (computer, phone, access to servers, etc.) meets your present and future needs for communication and data management.

✓ There are concerns and/or problems that you or another stakeholder have raised.

✓ There is documentation of how the telework has been beneficial for you, the teleworking employee(s), the onsite team, clients and the organization (e.g., better customer service, faster response times, better coverage, less overall stress, etc.).

If you find that things are not going the way you would like, reach out to the teleworker and schedule a time to talk in greater detail about what you've learned and what he/she thinks about the situation. Give the employee a chance to voice his/her side of the story, and then collaborate on solutions. Offer to help as appropriate and plan another check-in date. Focus on the importance of achieving work goals, just as you would with an onsite employee who is having performance issues.

How Do I Handle Performance Problems among My Teleworkers?

If you have followed the other tips in this Guide, chances are good that your team is succeeding with telework or at least working through the obstacles together. If something isn't working, check the tips to see if there is an idea you can try out to improve things. However, even the best people management techniques don't work for everyone, and you may have some teleworking employees who are struggling to be successful despite your best efforts.

It is understandable to want to pull a poorly performing teleworker back onsite, so that you can better oversee their work. It's totally acceptable for you to counsel or even require an employee

to work onsite for additional coaching and support (e.g., opportunities to go over work in progress together during the day). However, if no additional support options are available onsite, then requiring a struggling employee to work onsite is merely punitive and possibly wouldn't result in any better results than continuing to allow him/her to work offsite.

Most workplaces are also filled with distractions, so being onsite does not guarantee employees will be more focused or productive. For this reason, a simple "no telework" solution is not guaranteed to achieve the results you really want: a productive employee who doesn't consume too much of your time and energy.

If you are considering denying telework to an employee in a telework eligible job, ask yourself if forcing the employee onsite will improve productivity because:

- The onsite employee will eventually be able to self-manage his/her time and effort.

- You will be providing constant, direct oversight of the employee.

If the former is true, helping employees recognize where they do their best work and identifying other forms of flexibility that might meet their needs is preferable to simply denying access to telework. If you help an employee come up with an alternative to a bad telework situation, you can help develop the employee's abilities to self-manage and maintain his/her engagement with long-term performance maintenance. More importantly, making a directive to work onsite a last resort will help keep you time free from micro-managing the employee.

No matter where they work, employees are *always* responsible for their own performance and should be held accountable for their work. Confusing your responsibility to direct and develop employees with policing day-to-day behavior is of no benefit to anyone, least of all to you.

If the latter is true, you should consider whether it is worth bringing such employees back onsite if they will still be a significant drain on your and/or the team's resources. Such employees are better candidates for performance improvement plans and possible separation regardless of where they work. You should use all of the constructive tools in your toolbox to help the struggling employee improve his/her performance (e.g., a written performance improvement plan that both of you create, frequent check-ins and plans to assess how the improvements are working).

You can also ask HR or others for resources your organization provides such as EAPs that can coach the employee on time management and other skills. Ask the employee if there are other personal concerns that might be better managed with support from the organization (such as other forms of flexibility). If these strategies aren't effective, then it is time for you to pursue a termination, as you would for any other poorly performing employee.

Retention under more rigid circumstances may breed resentment and a downward performance spiral from both the employee and you as you waste resources chasing after non-performing employees. No matter where they work, employees are *always* responsible for their own performance and should be held accountable for their work. Confusing your responsibility to direct and develop employees with policing day-to-day behavior is of no benefit to anyone, least of all to you.

Additional Considerations

Watch out for overwork.

Telework allows employees to potentially work anywhere and at any time. It is important to make sure this advantage does not transform into working everywhere and all the time. Though having employees work more may sound good on the surface, when employees are overworked and can access each other anytime, they tend to plan less and become less efficient. Overwork can result in costs — sometimes significantly high costs — to the organization in terms of turnover and client dissatisfaction. In contrast, when employees have clear boundaries on their time and accessibility, they can plan ahead and be more efficient, improving both their opportunity to take care of themselves and their customers/clients.[6]

Wondering what the many types of workflex are beyond telework? An overview of the categories of flexibility are available in a free download: The Workflex Primer. You can also find it at WhenWorkWorks.org.

Combat overwork by having explicit times where employees are not expected to be checking email or taking calls, except in the case of emergencies. If employees and managers find that they cannot regularly respect those boundaries, then overwork can and probably will ensue. If this happens, challenge your teams to stop and reevaluate their work patterns and management styles to restructure work to protect these safe times. Research has shown that this results in better job satisfaction, performance and client satisfaction.[7]

Provide clear explanations and guides for stakeholders outside of your team.

All forms of workplace flexibility are more effective when they are created with a systems mindset, and telework is no exceptions. Consider how telework will alter communications between onsite and teleworking employees, clients, colleagues in other departments, senior leaders and yourself. Give special attention to colleagues in other departments who may not know the ins and outs of your team's work processes. Will other departments — especially those that can't or won't participate in telework — know how to get what they need on time?

Identify key communication channels between your team and other departments, and make sure all have an informed and supportive explanation of how telework functions within your

team and know when and how to get in touch with teleworking employees. For example, approach people in other departments who make regular requests with short deadlines before telework starts. Explain the process, and ask for their input on what kind of contact options (e.g., phone, email, regular meetings, etc.) and notice of telework schedules they need to do their jobs. By involving them from the beginning in this process, you can avoid a number of future problems. Furthermore, when all key stakeholders in your organization have participated in shaping your teleworking program, they will be more apt to help resolve work problems if and when they do arise — rather than demanding that telework be ended.

Sponsor your teleworkers' advancement.

Out of sight should not mean out of mind, but your teleworking team members will need your support to stay visible. During your regular discussions, ask them what other people in your organization or among your clients or customers they feel they should meet, and facilitate those connections. Enable your teleworkers to select high-profile or developmental projects that showcase their skills. Make an effort to mention them by name during discussions about their work, and offer to connect leaders with them as appropriate. Consider whether having a teleworking employee make a personal appearance at a meeting would be a gateway to more recognition and respect for your team and its leader. If trainings are being offered, look into how the employee might attend them in person, remotely, or if it would be possible to take a similar training at the employee's location.

Clearly, successfully managing teleworkers is more involved than simply allowing employees to work remotely. There are communications, performance management and other considerations that make the difference between just having telework and making telework a valuable strategic tool.

The preceding tips are a broad overview of the kinds of things managers of teleworkers should take into account when fostering telework in their teams. Although Sections 1 and 3 of *Workflex and Telework Guide: Tips for Anyone to Work Anywhere* are written for HR professionals and teleworkers, managers who understand these other perspectives will be well positioned to lead the strategic use of telework for better individual and organizational performance.