Wrike

Virtual Team Management Guide

If you've ever managed a remote worker or an entire remote team before, you know how difficult it can be to keep everyone aligned. If you're about to manage from afar for the first time, there are a few major challenges you need to carefully consider before work begins:

#2: How to encourage the company vision without holding a face-to-face conversation.

#1: How to get your team organized without seeing them in person.

#4: How to keep a good project pace without constant communication.

#3: How to ensure team members work diligently without sitting in the same office.

Running a virtual team often takes more work than running a co-located team, but it isn't impossible.

We've created a checklist of the processes, tools, and mindsets you'll need to create solutions for those challenges and keep your virtual team on point. If you can check off every item on this list, your virtual team is well on its way to success.

Get the checklist on the next 3 pages

Wrike

THE PROCESSES

STANDARDIZED ON-BOARDING

Keep a log of everything that must be communicated upon hiring a new team member — relevant documents, lists of tools everyone uses (including login details when needed), procedures, protocols.

OPERATIONS DOCUMENT

This should be a document employees can refer to when they have questions about where to turn or what to do next. It should include: how to report project statuses and whom to report to, how you resolve issues (both project or colleague related), who is responsible for assigning tasks and how tasks will be assigned, the proper times to show up for meetings, how to handle missed — or predicted to be missed — deadlines.

COMMUNICATION GUIDEBOOK

Set guidelines for the way people communicate with one another. This keeps important information from getting lost. For example: we use Skype for IM, Wrike for all work conversations, and email only when the conversation involves someone outside of the company. Virtual meetings are held using Skype or GoToWebinar, depending on the size of the meeting.

CONTACT INFORMATION SHEET

Full name. Phone number. Email address. Skype ID. Keep a document of all of this information, and put it in your cloud storage space so it's accessible to everyone at any time. Encourage team members to communicate and take advantage of each others' knowledge.

REGULAR MEETINGS

With individuals and with the entire team. Since you won't be seeing one another in person, team meetings are a good way for people to put names to faces and voices.

MONTHLY / QUARTERLY REVIEW

Hold a quarterly review meeting to measure and provide big-picture feedback about team and individual progress. Ask not only about their work, but how they're feeling about the work they're doing, how they're working with their colleagues, and how their personal life is going. Make sure they know they can come to you if something goes awry in work, or if something in their personal life is affecting their work.

FACE-TO-FACE TIME (OCCASIONALLY)

If your team members are distributed between a few key places, pay for people to come together once in a while for team building events. Otherwise, use video calls whenever possible in lieu of simply voice calls.

TIME ZONE SENSITIVITY

Virtual teams usually mean different time zones. Rotate meeting times to make sure that one team isn't always waking up early while the other is forced to go to bed late.

SMART HIRING

The reality is that not everyone is cut out for the virtual work world. Even if your prospective new employee has proven abilities in a shared office, they might not work well virtually. One solution is to put your new hire on a short-term contract before bringing them on indefinitely.

THE TOOLS

INSTANT MESSENGER

You won't see each other in person. Get a chat or IM tool so you can "run into each other in the kitchen" or share funny links you found on the internet. It builds a sense of community on the team when they don't have a real watercooler to gossip around. We use Skype.

SCREEN CAPTURE

You won't be able to point at your screen and say, "See?!" We use Jing to record screencasts and illustrate points we are trying to make for our colleagues.

SCREENSHARING

If you're on a call and you want to point with your cursor as you're talking, you can use a screensharing tool to show them what's on your screen and direct attention during a conversation. We use join.me.

CLOUD FILE SHARING

A place to store all relevant files so that everyone can access them — like your list of contact information, communications guidebook, and operations document. Keeping documents in the cloud is especially important if one party has gone to sleep while the other party NEEDS the document to continue working. Popular options include Google Drive, Box, and Dropbox.

COLLABORATION

Working together is essential to team success. Get a collaboration tool to facilitate your task planning and execution. Wrike is a group collaboration software for teams of all sizes.

Wrike

THE MINDSETS

BE AVAILABLE

If you've already shared all your contact information, make yourself available to your team members whenever they need your help. Consider holding regular weekly "office hours" so that your team always knows the best time to contact you.

ALLOW FLEXIBLE WORK HOURS

One of the most popular benefits of working virtually. Ask for some consistency so you know the best times to reach your team members — and vice versa — but allow people to work at *their* best hours of the day, not *your* best hours of the day.

ENCOURAGE CHATTING

Humans are social creatures. Working from home lends itself to… talking to the walls. Once you have the tool to create an online area for informal conversation, make sure people use it. Share life updates, fun news, and celebrity gossip. Casual bonding strengthens a team and keeps your people around longer.

CELEBRATE ACHIEVEMENTS

Since working virtually can be isolating, you'll have to work extra hard to make sure your team members feel appreciated. Celebrate every small and large achievement, no matter how (seemingly) inconsequential. Your team will appreciate the effort.

BE CLIQUE-AWARE

When you bring in a new virtual team member, your existing team might be resistant. They already work well together, have their processes in place, and won't want the outside interference. Make sure your existing team plays well with the new team member. Take time to make sure they are included in the informal chatting and bonding.

PRIORITIZE CQ

Heard of CQ yet? It's similar to IQ, but for cultural awareness and sensitivity. And author of *Cultural Intelligence*, Julia Middleton, argues that it is even *more* important than IQ. Educate your team members so they don't view cultural differences as a setback or yet another barrier to jump over. It's not only about respecting differences, it's about *thriving* on them. Cultural differences are one of the perks of a virtual team! Take advantage of them and encourage differing opinions instead of trying to build a group-thinking team. You never know who will come up with a wonderful new idea.

Wrike is a leading online collaboration
and project management platform to get your virtual team in sync.

Click here to get your own free trial