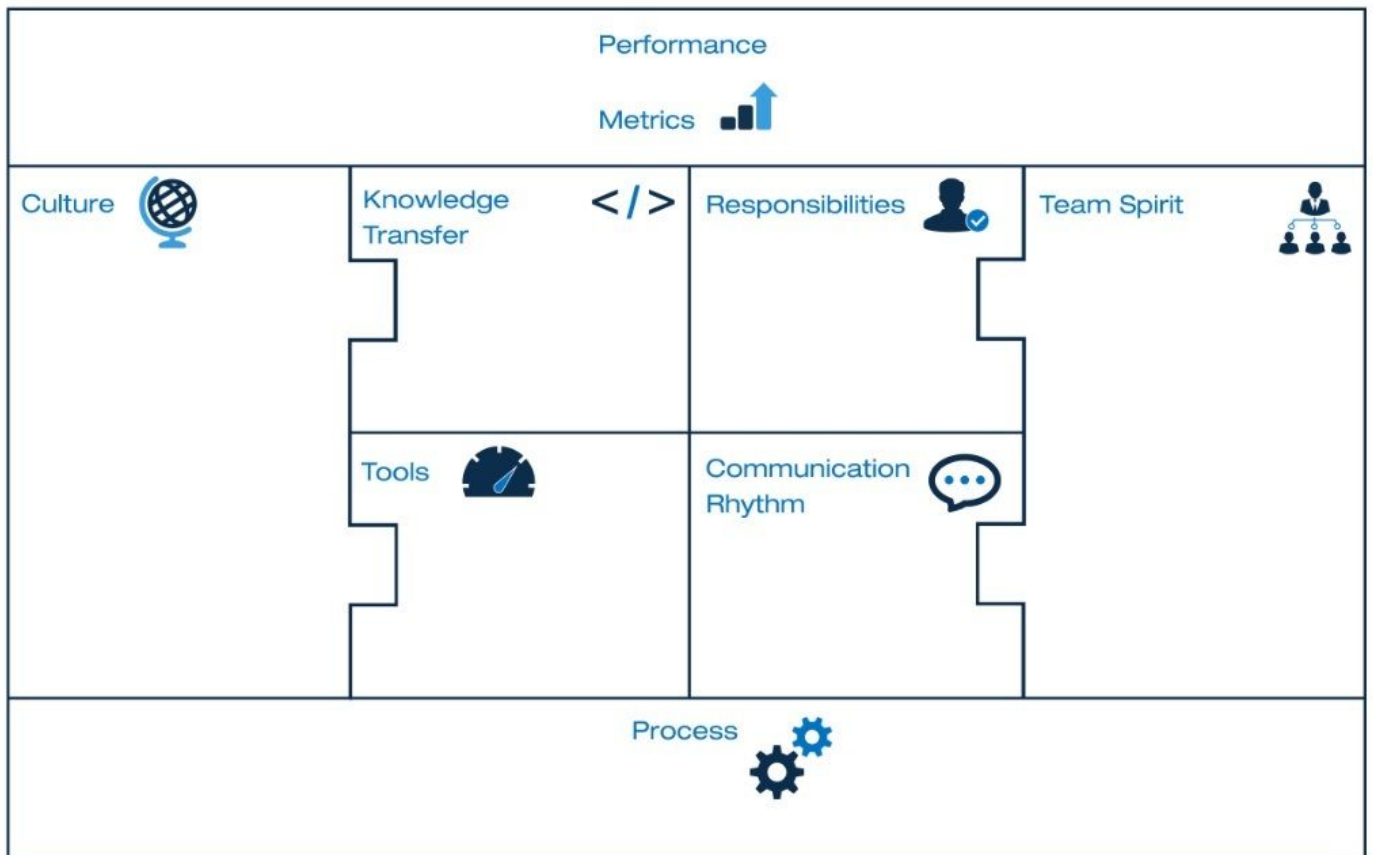


# ekipa



Thanks for downloading our distributed team canvas!

You can use this canvas with your team to create alignment on the building blocks of distributed teams. If you choose to do this on your own, you can gather your team around the canvas. Use a lot of sticky notes and pens. And start making agreements about how your team will address each of the different blocks. The goal is to create a 'social contract' with your whole team. For specific questions to guide you through each of the blocks, see the appendix in this document.

[Ekipa Academy](#) offers one day workshops to go through the canvas with your team. During the workshop, our facilitator will share a lot of best practices and help your team get most benefit from our canvas. We can do this remotely and in-house in your office. We also offer coaching to help your team implement the improvements agreed during a workshop. Drop an email to [hugo@ekipa.co](mailto:hugo@ekipa.co) get more details about our offering. Here's some high level information about our workshops:

### **1 day workshop 'structure your distributed team'**

Design your virtual organization in this practical workshop, so you can start producing results on Monday. In this workshop, which we can do remotely or in your office, your team will create a 'communication blueprint'.

#### **What you will get as a result:**

- Clear agreement on your team's work process
- Concrete actions to create 'one team'
- Clarity on kpi's and reporting
- Actions to bridge cultural differences

Many globally distributed teams 'go with the flow' – they are formed spontaneously and routines are created step by step. Those are often not the most productive routines.

Most teams learn by trial and error. With the right approach, many pitfalls and wrong routines can be avoided.

Based on 10 years of experience, Hugo has developed a workshop that covers every major aspect of remote collaboration. In this workshop, your team will do the work. Hugo will facilitate that work and share best practices where needed. Our roadmap is Distributed Team Canvas:

**The points we will cover:**

**Process:** We look at your current process: what steps do you take from beginning to end. Then we'll (re-)design the process for the (new) distributed setting.

**Responsibilities:** Who does what? For all people involved, you'll design the roles and responsibilities.

**Culture:** What are each person's assumptions about the other culture? Which ones are 'true'? How can we organize around those?

**Tools:** how do we track projects? How do we share documents? What's the role of email? What other tools do we need?

Communication rhythm: How (often) do we communicate? When do we schedule daily/weekly meetings? What communication tools do you plan to use?

**Performance:** What & how do we measure individual and team performance ?

**Team spirit:** What are our company's and individual values? Do we know our company or project mission and vision? What specific actions will we take to 'bond'? How do we make the globally distributed people feel as 'one team'?

## Appendix: instructions for distributed team canvas workshop



**Discuss with your team how you take a project from A to Z.**

### Questions:

How does the requirements gathering phase work?

When and how do you provide estimates and what's the role of the remote team in that?

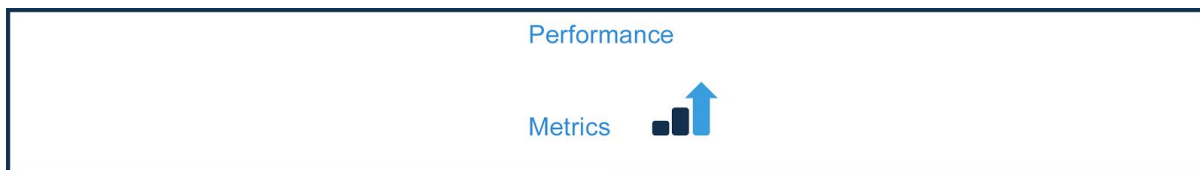
How does the testing look?

### Examples

1. In a software solutions firm, the process could be: A. Client intake; B. 1 page proposal generated onshore; C. Extended requirements document made offshore, including estimate; D. After client signature: send microsoft planning document to client; etc

2. A software product firm could apply Scrum and define the specific roles + the artifacts they use (sprint planning, demo, retrospective), the sprint duration, etc.

Sidenote: if there's no document or flowchart describing the process, there is no process.



**Discuss with your team members how you measure company/team/individual performance and how you report the kpi's to one another.**

### Questions:

How do you measure the performance on your global team?

(How) do you differentiate between company/team/individual kpi's?

What kpi's did / did not work for you?

How do you update everyone (system/tool)?

How do you keep each other accountable?

### Examples

1. A software team can use velocity as the core metric sprint-on-sprint > is that metric working for your team?

2. At Ekipa.co, we use a kpi dashboard for the management team in a Google sheet, see appendix
3. At Bridge Global, we ask our customers every week what their 'feeling' about the collaboration with our team is on a scale of 1-10. This serves as our metric for measuring customer satisfaction and team performance.



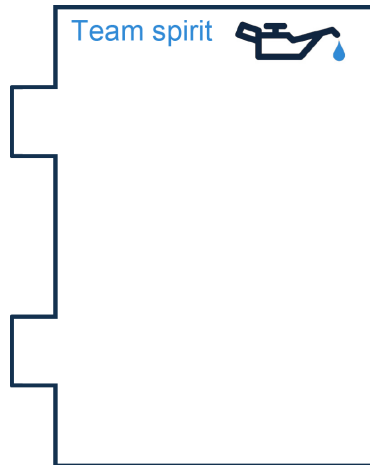
**Discuss what impact you found cultural differences to have on your work and what you can do to organize around them, increasing cultural awareness.**

**Questions:**

- What funny stories can you share about each others culture?
- What additional exercises, games, trainings can your team do?
- Discuss some examples of challenges you face, attributable to culture?
- What can you do to bridge the cultural differences?

**Examples**

1. Move to the other country for 6-12 months
2. Do a workshop or training on cultural differences
3. Make the assumptions about the other culture explicit and falsify with the team whether they are true
4. Fill the culture map (see attachment)



**Discuss with your team members what you (can) do to create a sense of being 'one team'.**

**Questions:**

How do you create a feeling of 'one team'?

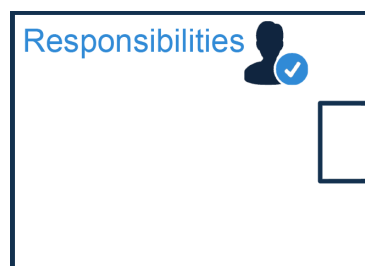
How do you share company or team vision, mission, values?

When and how often do you meet up in person?

What other games, exercises, etc can you do?

**Examples:**

1. Some companies get their remote colleagues to the all company party once or twice a year?
2. Organize a friday beer party locally and involve the remote colleagues through video conferencing
3. Discuss 'spirit' in a conference call: What are each others values? What does it mean to be a team? What do we want to accomplish together?
4. Have a look at the Team Canvas <http://theteamcanvas.com/> or make your own team one pager



**Discuss how you have assigned roles and responsibilities within your team**

**Questions:**

How do you assign roles and responsibilities to each team member?  
Is there a role that you couldn't go without?  
How does everyone know what the responsibilities of others are?  
Do you use a tool or system to share the responsibilities?

### Examples

1. Follow scrum and 'assign' product owner, scrum master roles, etc.
2. At Bridge Global, we have a 'process manager' in each team. This person is the facilitator between the customer product owner/project manager and the remote team. She's responsible for 'smooth collaboration', supported by a weekly review call in which we 'grade' each other on a scale of 1-10 ('feeling').
3. Create a formal framework with roles and responsibilities, shared with each other through google docs
4. Play the Meddlers Game  
<https://management30.com/wp-content/uploads/2015/03/08-Meddlers-Tiles-and-Pieces-v1.011.pdf>



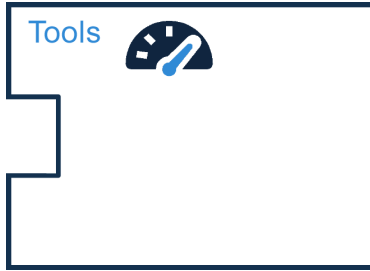
**Discuss what standards and rules you have or need**

### Questions:

What coding standards do we follow?  
Do we have rules?  
Are there company standards or policies we need to stick to?

### Examples:

1. Your scrum team may have a definition of done, which can be specified
2. You can follow certain coding standards, which you can discuss and document.
3. Your team or company may have certain leave policies, which can be discussed and agreed upon here.



**Discuss what tools work wonders to collaborate with your remote colleagues?**

Examples:

1. Asana/Jira for project management
2. Skype/Zoom for video conferencing
3. Slack/email for direct communication

Tip: check out Lisette Sutherland's toolset in the appendix.



**Discuss how and when you hold meetings within your team**

**Questions:**

How often do you talk to each other?

Is there a multi-level meeting rhythm (strategic, operational, tactical, etc)?

Who attends what meeting?

What's the agenda you use?

**Examples:**

1. At Bridge Global, for management we follow 'The Rockefeller Habits', which includes a rhythm of yearly, quarterly, monthly, weekly and daily meetings
2. Use scrum and follow all the predefined meetings (and if you do, which ones work and how do they work for you)?