



Remote-First Work: Playbook Template

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1. WHY DO WE NEED A REMOTE-FIRST PLAYBOOK?



TL'DR:

- The chapter emphasizes the importance of adaptability in the face of change.
- It discusses the benefits and challenges of remote and hybrid work.
- It sets the stage for the rest of the playbook by outlining the key areas of focus.

- Welcome to the Remote Work Playbook - a testament to our commitment to fostering a flexible and productive work environment.
- We will explore the remote work model, a flexible work arrangement that allows our team members to work from different locations based on their role and tasks.

- This model is designed to provide the perfect balance between work and life, promoting productivity and well-being.

1.1 What are Our Remote-First Principles?

1. **Work is an Activity, Not a Place:** We believe that the value of work is not determined by where it's done, but by the quality and impact of the outcome. We support flexible work arrangements that allow our team members to work where they are most productive and comfortable.
2. **Asynchronous Communication is Preferred:** We understand the importance of uninterrupted focus time for deep work. Therefore, we encourage asynchronous communication as much as possible to minimize disruptions and respect everyone's time.
3. **Meetings are the Last Resort:** We value our team members' time and believe that meetings should only be held when absolutely necessary. We encourage the use of other communication channels, such as email and chat, for non-urgent matters.
4. **Written Communication is Oxygen:** Clear and concise written communication is the lifeblood of our operations. We encourage everyone to hone their writing skills to ensure effective and efficient communication across the team.
5. **Every Meeting Must Have a Clear Purpose and Agenda:** We believe that every meeting should have a clear purpose and agenda to ensure that everyone's time is well spent. This also allows team members to prepare in advance and contribute effectively during the meeting.
6. **Everyone Has a Voice:** We believe that everyone's input is valuable. We encourage open dialogue and active participation from all team members, regardless of their role or seniority.
7. **Make Things Explicit:** We believe in making things explicit – from our expectations to our feedback. This ensures that everyone is on the same page and minimizes misunderstandings.
8. **Trust by Default:** Trust is the foundation of our team. We trust our team members by default, believing in their skills, capabilities, and commitment to deliver their best work.
9. **Flexibility is Not a Perk, But a Necessity:** We understand that everyone has different needs and preferences when it comes to work arrangements. We offer flexibility not as a perk, but as a necessity to ensure that everyone can work in a way that suits them best.
10. **Respect Time Zones:** We respect the time zones of our team members and strive to schedule meetings and deadlines in a way that is considerate of everyone's work hours.
11. **Use the Best Tools for the Job:** We believe in using the best tools for the job. We continually explore and adopt new technologies that can enhance our productivity and collaboration.
12. **Embrace Transparency:** We believe in transparency. We strive to share information openly and honestly, fostering a culture of trust and collaboration.
13. **Foster a Culture of Continuous Learning:** We are committed to fostering a culture of continuous learning. We provide opportunities for professional development and encourage our team members to continually expand their skills and knowledge.

14. **Practice Empathy and Understanding:** We believe in practicing empathy and understanding. We strive to understand the perspectives of our team members and to create an inclusive and supportive work environment.
 15. **Promote Work-Life Harmony:** We understand the importance of work-life harmony. We respect the personal time of our team members and strive to promote a healthy balance between work and personal life.
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3. HOW TO BUILD A GREAT COMMUNICATION CULTURE?



TL'DR:

- The chapter discusses the importance of building a strong and inclusive remote and hybrid work culture.
- It provides strategies for fostering connection and collaboration in a remote and hybrid team.
- It emphasizes the role of leaders in shaping the remote and hybrid work culture.

3.1 Introduction 🙌

 **Communication is a crucial aspect** of collaboration and work in general. Researchers have found that workers spend a full 80% of their workdays communicating with colleagues. [1]

- Email: Workers spend an average of six hours a day on email alone. [2]
- Meetings: Time spent in meetings has increased dramatically since the pandemic, ballooning by 253% according to a study by Microsoft. [3]
- Chat apps: The average Slack user sends an average of 200 messages a day, though 1,000-message power users are "not the exception." [4]

ADDITIONAL KNOW-HOW

▼ **How synchronous-first work negatively affects everyone involved?**

Remote work requires a different approach to work organization and communication. Teams that try to go remote without putting in place tools, workflows, and norms for asynchronous communication... will fail. Synchronous-only work can negatively impact people's personal lives, cause cognitive overload, create difficulties in coordination across time zones, lack of visibility into what others are working on, and can make it difficult to build relationships and trust with team members. Furthermore, there is an increased risk of miscommunication and misunderstandings.

1.2.1 Synchronous-only work affects private life

When work is highly synchronous, it can have a negative impact on people's personal lives. For example, if someone is expected to be available for meetings or calls at all hours of the day, it can make it difficult to disconnect from work and can lead to burnout. This can also reduce job satisfaction and engagement, and have a negative impact on personal relationships. By contrast, asynchronous work can help to create clearer boundaries between work and personal life, allowing people to achieve better balance and reduce stress.

1.2.2 Context switching causes cognitive load

When people are constantly shifting between tasks and interruptions, it can be difficult to stay focused and productive. Research has shown that it takes an average of 23 minutes to fully regain focus after an interruption, and that the more times people switch tasks in a day, the more fatigued they become. Asynchronous work can help to reduce cognitive overload and enable people to work more efficiently.

1.2.3 Difficulty coordinating across time zones and schedules

With remote teams working across different time zones, it can be challenging to coordinate schedules and find a time that works for everyone. This can lead to delays and difficulties in meeting deadlines. Asynchronous work can help to alleviate this issue by allowing team members to work at their own pace and respond to messages and requests when it's convenient for them.

1.2.4 Lack of visibility into what others are working on

In a remote environment, it can be difficult to know what others are working on and the progress they've made. This can lead to duplicative efforts or missed opportunities to collaborate. Asynchronous work can help to improve visibility into what others are working on by enabling team members to share updates and progress reports on shared documents or project management tools.

1.2.5 Difficulty in building relationships and trust with team members

When working remotely, it can be challenging to build relationships and establish trust with team members. This is especially true when relying solely on synchronous communication channels. Asynchronous work can help to improve team relationships by allowing team members to share more about their personal lives and interests, and to communicate in a less formal and more conversational manner.

1.2.6 Increased risk of miscommunication and misunderstandings

When communication is done solely through synchronous channels, there is an increased risk of miscommunication and misunderstandings. This is due to the lack of nonverbal cues and the pressure to respond quickly. Asynchronous work can help to reduce the risk of miscommunication by allowing team members to take the time to compose thoughtful responses and review messages before sending.

▼ Why more asynchronous work is better?



The goal of async work is to create a balance between: 🍷 **effective collaboration**, and uninterrupted time for 🧘 **deep work**.

1. Reduce distractions and interruptions

Research has shown that constant interruptions can lead to a loss of productivity and increased stress levels. In fact, a study by RescueTime found that the average knowledge worker spends only 1 hour and 12 minutes on focused work each day, with the rest of their time being spent on distractions and interruptions. By using asynchronous communication, team members can better manage their time and reduce interruptions, leading to increased productivity and reduced stress levels.

2. Enable people to work more independently and autonomously

Asynchronous communication allows team members to work at their own pace and schedule, rather than having to constantly coordinate schedules and be available for synchronous communication. This can lead to increased autonomy and a sense of ownership over one's work. A survey by Buffer found that 98% of remote workers would like to work remotely at least some of the time for the rest of their careers, and autonomy is cited as one of the top reasons for this preference.

3. Increase transparency and accountability



When communication is asynchronous, everything is documented and easily accessible, making it easier to track progress and ensure accountability. This can be especially important for remote teams, where team members may be located in different time zones and may not have the opportunity for face-to-face communication. Asynchronous communication tools like Trello, Asana, and Slack allow team members to share progress updates, assign tasks, and collaborate on projects, all while keeping everyone in the loop.

4. Improve the quality and thoughtfulness of communication

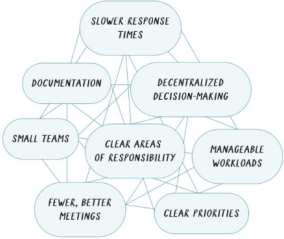
Asynchronous communication allows team members to take the time they need to craft thoughtful responses and consider their ideas before sharing them with the team. This can lead to higher quality communication and better decision-making. In fact, a study by the University of California, Irvine found that interruptions and task-switching can decrease productivity and increase stress levels, while uninterrupted work time can lead to higher quality work and increased job satisfaction.

▼ What Is asynchronous communication?

What People Think Async Is



What Async Actually Is



Source: Twist

Synchronous vs asynchronous

Synchronous communication

It refers to real-time interaction between two or more individuals, where the exchange of information is instantaneous. It is often characterized by immediate feedback and a sense of connection between team members. In an office setting, synchronous communication is the norm and is typically used for urgent or high-priority communication needs.

Here are some examples of synchronous communication activities and tools:

- **Meetings:** Scheduled meetings where team members gather to discuss a particular topic or project. Tools for synchronous meetings include

Asynchronous communication

It refers to communication that is not immediate and does not require real-time interaction between two or more individuals. This type of communication is characterized by a time delay between the sending and receiving of messages, and is often used for low-priority or non-urgent communication needs.

Here are some examples of asynchronous communication activities and tools:

- **Email:** Email is a popular form of asynchronous communication that allows for the sending and receiving of messages at a time that is convenient for both parties. Tools for

Zoom, Google Meet, Skype, Microsoft Teams, and GoToMeeting.

- **Phone calls:** Real-time voice conversations over the phone, often used for urgent or time-sensitive communication. Tools for synchronous phone calls include mobile phones, landlines, and VoIP services like Skype and Google Voice.
- **Video conferences:** Real-time virtual meetings that allow participants to see and hear each other. Tools for synchronous video conferencing include Zoom, Google Meet, Skype, Microsoft Teams, and GoToMeeting.
- **Instant messaging apps:** Real-time text-based communication that allows for quick exchanges between team members. Tools for synchronous messaging include Slack, Microsoft Teams, Google Chat, WhatsApp, and Telegram.

asynchronous email include Gmail, Outlook, Yahoo Mail, and Apple Mail.

- **Message board:** tool for asynchronous communication that allows team members to post messages, share files, and collaborate on projects without the pressure of an immediate response. Message boards, such as Twist and Basecamp, are useful for sharing updates, assigning tasks, and brainstorming ideas. They can be used to keep everyone in the loop without the need for constant check-ins or interruptions. Other message board tools include Trello, Asana, and [Monday.com](https://www.monday.com).
- **Instant messaging apps:** such as Slack and Microsoft Teams, are a type of synchronous communication that allows team members to communicate in real-time. These tools are useful for quick questions or updates that require immediate feedback. Messaging apps can also be used to share files, links, and other resources. They are particularly useful for remote teams who want to maintain a sense of connection and collaboration. Other messaging apps include Google Chat, WhatsApp, and Telegram.
- **Project management tools:** Project management tools allow team members to collaborate on projects, assign tasks, and track progress at their convenience. Tools for asynchronous project management include Trello, Asana, Basecamp, Jira, and Monday.
- **Document collaboration:** Document collaboration tools allow team members to work together on a document, spreadsheet, or presentation at their convenience. Tools for asynchronous document collaboration include Google Docs, Dropbox Paper, Microsoft OneDrive, and Notion.
- **Video recordings:** Video recordings can be used for asynchronous communication, allowing team members to share information or presentations at a time that is convenient for the viewer. Tools for asynchronous video

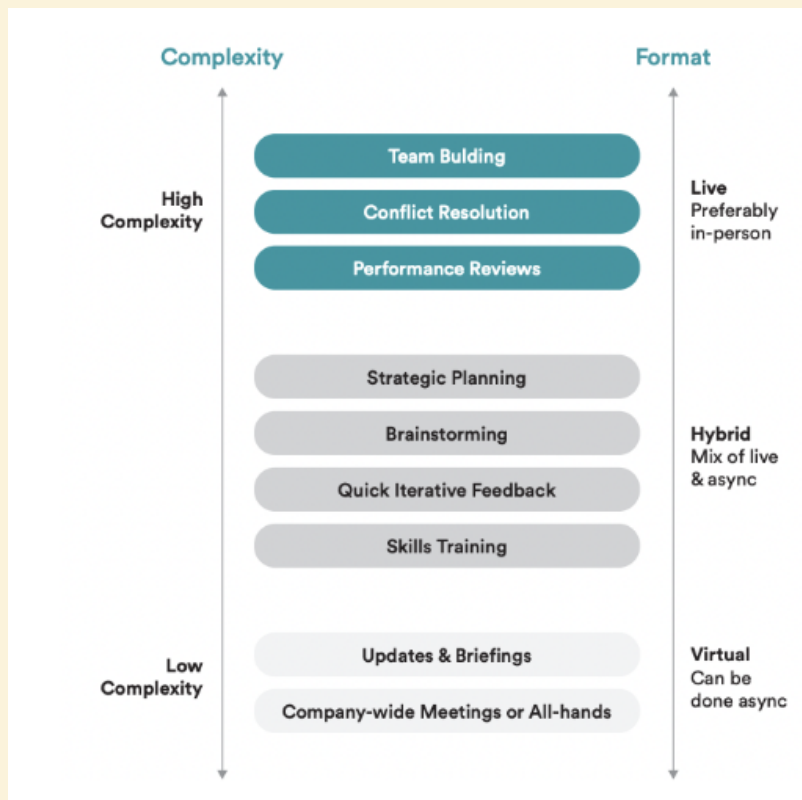
recordings include Loom, Zoom, and Microsoft Stream.



Sync communication 🗣️	Async communication 📧
Communication requires all team members to be present simultaneously, in meetings and video calls or respond quickly to work chats or emails.	Communication happens in writing or prerecorded video with team members catching up and responding on their own schedules.
Everyone is tied to more or less the same work schedule.	Everyone can work when it works best for them.
Prioritizes speed of collaboration.	Prioritizes focus and flexibility.

▼ **When to sync, and when to async?**

In order to effectively manage remote teams, it's important to have a clear understanding of when to use synchronous vs asynchronous communication. This will help you optimize productivity, ensure effective collaboration, and prevent burnout. Below is a visual representation of when to use synchronous and asynchronous communication in different scenarios, which can serve as a helpful guide for remote teams.



Source: Asana

3.3 What are the most effective communication rituals



Studies show that **people read only 20% of the words they encounter**. Distill what you need into as few words as possible.

In a remote work environment, written communication becomes even more crucial. Whether you're a seasoned writer or someone who prefers to communicate verbally, mastering the art of written communication is key to ensuring clarity, reducing misunderstandings, and fostering effective collaboration. Here are some golden rules to help you write effectively in a remote work setting:

Keep it simple:

- Write short and specific messages.
- Remove unnecessary words and get straight to the point.
- Use simple instructions or lists of tasks instead of long explanations.
- Use Grammarly to help you ensure clear messages free of grammatical or spelling errors.

Move things forward:

- Be firm and consistent in your requests and suggestions.
- Clearly state deadlines and expectations for next steps before ending meetings, email exchanges, or chat threads.
- Ensure everyone understands what comes next to maintain momentum and focus on work.
- Use due dates to help with prioritization and flexible assigning to allow team members to pass the baton to another.


Context matters:

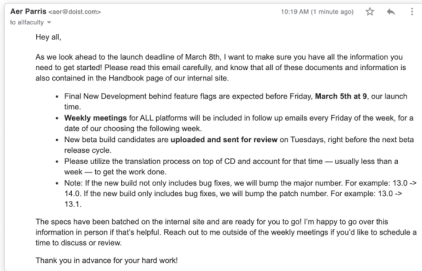
- Remember that tone of voice, facial expressions, body language, and other nuances can get lost in written asynchronous communication.
- Be mindful of irony and sarcasm, as well as shorthand that can be misunderstood without full context.
- Use encouraging, positive language and generous exclamation points or markers to convey positivity.
- Assume the best when reading messages and clarify with the sender when necessary.
- Provide additional information and context to help others understand where you're coming from.

Over-communicate:

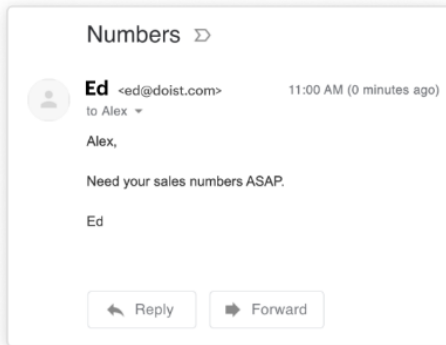
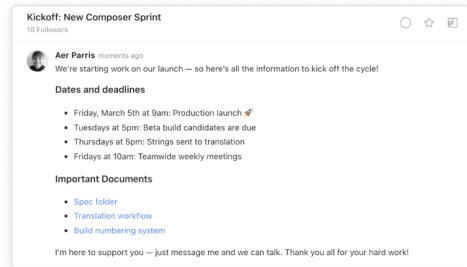
- A few extra minutes adding details and editing for clarity on the front-end can save days of back- and- forth in an async environment.
- When sending a message, include as much information as possible.
- Visualize things with screenshots or video recordings.

- Be clear about what you need from the other person and what the deadline is.

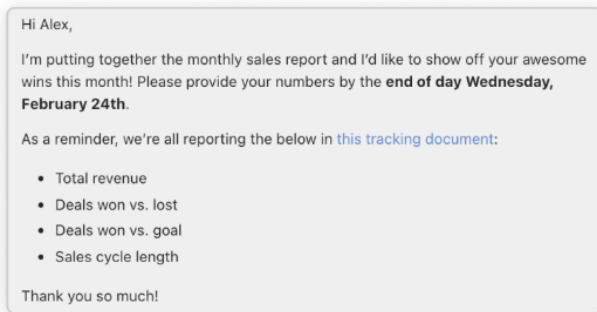
 **Care about formatting:**



- X **RANDOM, NON-SKIMMABLE BOLDING**
- X **DIFFERENT LENGTH BULLET POINTS**
- X **CONFUSING MIX OF DATES AND NOTES**
- ✓ **ORIENTING THREAD TITLE**
- ✓ **USEFUL, SKIMMABLE HEADERS**
- ✓ **STANDARDIZED BULLET POINTS**
- ✓ **LINKS TO ADDITIONAL INFORMATION**



VS



Source: Twist

3.4. What is the Communication Policy on the Company Level

3.4.1 What is our Communication Hierarchy

1. **Immediate Supervisor:** For project-specific questions, concerns, or issues, contact your immediate supervisor.
2. **Department Head:** For issues or questions that can't be resolved with your immediate supervisor or that affect the entire department, contact your department head.
3. **IT Support:** For technical issues with your equipment or software, contact IT support.
4. **HR Department:** For questions or concerns related to HR policies, benefits, or workplace issues, contact the HR department.



5. **Executive Team:** For issues or concerns that affect the entire team or that can't be resolved through other channels, contact the appropriate member of the executive team.

3.4.2 What are the Communication Touchpoints

1. **Channel Usage:** Use channels for team-wide communication. Channels should be created based on projects, departments, or specific topics. Avoid sending team-wide messages in the General channel unless it's relevant to everyone.
2. **Direct Messages:** Use direct messages for one-on-one communication or for small group discussions that don't involve the entire team. Avoid using direct messages for information that could be useful to the whole team.
3. **Meetings:** Schedule and conduct all meetings through Teams. Use video when possible to foster a more personal connection. Record meetings for those who can't attend and for future reference.
4. **Notifications:** Customize your notifications to avoid unnecessary distractions. You should be notified of direct messages and mentions, but you might choose to limit notifications from channels.
5. **Status Updates:** Keep your status updated to reflect your availability. This helps team members know when it's a good time to reach out to you.
6. **Professional Conduct:** Maintain professional conduct at all times. Remember that Teams is a workplace tool.
7. **Training:** Attend any training sessions on Teams to ensure you're using the platform as efficiently as possible.

3.5 Communication Protocol: what to include +

This table outlines the guidelines for each communication channel. It is designed to facilitate effective and efficient communication among team members in remote or hybrid work environment.


Initiative	Purpose	Guidelines	Tools	Action
 Establish Clear Communication Channels and Protocols	To ensure effective communication and prevent confusion or misinterpretation.	Create guidelines for each communication channel, including expected response times, use cases, and escalation procedures for urgent matters.	MS Teams	Create a communication protocol document that outlines the guidelines for each communication channel.
 Set Expectations for Response Times	To manage team members' expectations and	Establish expected response times for each communication channel, taking into account time zone differences and urgency levels.	MS Teams, Outlook, Google Calendar	Create a response time policy that outlines expected response times for each

	prevent delays in communication.			communication channel and how to handle missed response times.
 Encourage Asynchronous Communication	To allow team members to work at their own pace and minimize disruptions.	Establish guidelines for using asynchronous communication channels such as email or message boards, including when to use them and how to handle urgent matters.	Email, MS Teams	Create an asynchronous communication policy that outlines the guidelines for using asynchronous communication channels. Check
 Use Collaborative Tools for Project Management	To centralize project management and streamline collaboration among team members.	Establish guidelines for using project management tools such as MS Teams, including how to use them effectively and how to handle changes in project scope or deadlines.	MS Teams, Outlook	Create a project management framework that outlines how to use the chosen tools and establish project management best practices.
 Have a Cadence for Regular Check-Ins	To maintain team cohesion and ensure everyone is on the same page.	Establish a regular schedule for team async check-ins, and set expectations for participation.	MS Teams	Create a meeting framework that outlines the agenda for each meeting and expectations for participation. Check
 Foster a Culture of Transparency and Feedback	To build trust and improve team communication and collaboration.	Encourage open and honest communication, and establish guidelines for giving and receiving feedback.	MS Teams, Google Forms	Create a feedback framework that outlines how to give and receive feedback effectively and establish a culture of transparency and honesty.

In this version, I've bolded all items in the "Initiative" column and important words in the "Action" column as you requested. I hope this helps clarify the difference between the "Guidelines" and "Action" columns.

 **READY-TO-USE MATERIALS** 

This protocol is a template designed to be personalized by each team. It provides a framework for communication that can be tailored to the unique needs and workflows of your team. As a people leader, you are encouraged to adapt this protocol to best suit your team's communication style and requirements.

▼  **[Your Team's Name] Communication Protocol [TEMPLATE]**

 **Email**

Purpose:

[Define the purpose of email communication within your team. For example: "For non-urgent, detailed communication that does not require an immediate response. Non-urgent matters include project updates, meeting minutes, and general inquiries."]

Guidelines:

- **Subject Line:** [Provide guidelines for crafting email subject lines. For example: "Craft a clear and concise subject line. For example, instead of 'Project', use 'Project X: Weekly Update'."]
- **Summary:** [Provide guidelines for email summaries. For example: "Begin with a brief summary of the message. For example, '[Summary: This email contains the weekly update for Project X, including progress, challenges, and next steps.]'"]
- [Additional guidelines as needed]
- **Response Time:** [Define your team's expected response times for email communication. For example: "For non-urgent emails, we expect a response within 24 hours during the workweek. For urgent emails, please respond as soon as possible."]

[Your Team's Preferred Messaging Platform]

Purpose:

[Define the purpose of real-time messaging within your team. For example: "For real-time collaboration and communication that requires immediate attention. Urgent matters include issues that may delay project timelines, critical updates, and immediate decisions."]

Guidelines:

- [Provide guidelines for using your team's preferred messaging platform. For example: "Use the 'channel first' approach for communication to improve transparency. Clearly state the purpose of the message or meeting. Use @mentions to notify specific team members but avoid overuse. Ensure you tag the right crowd."]
- **Response Time:** [Define your team's expected response times for messaging. For example: "Respond within 1-2 hours during the work day."]

[Your Team's Preferred Document Collaboration Platform]

Purpose:

[Define the purpose of document collaboration within your team. For example: "For collaborative document creation and sharing."]

Guidelines:

- [Provide guidelines for using your team's preferred document collaboration platform. For example: "Define the purpose and scope of the document before starting. Assign clear roles and responsibilities to each team member. Use comments for feedback and suggested edits."]
- **Response Time:** [Define your team's expected response times for document collaboration. For example: "Respond to comments and edits within 24 hours during the work week."]

[Your Team's Preferred Video Meeting Platform]

Purpose:

[Define the purpose of video meetings within your team. For example: "For scheduled, real-time discussions and collaborations."]

Guidelines:

- [Provide guidelines for scheduling and conducting video meetings. For example: "Schedule meetings at least 24 hours in advance. Send an agenda and any relevant materials ahead of the meeting."]
- **Response Time:** [Define your team's expected response times for meeting requests. For example: "Respond to meeting requests within 24 hours during the work week."]



Escalation Procedures

[Define your team's escalation procedures for urgent matters.]

For example: "For urgent matters that require immediate attention, escalate the issue through the following channels in order:

1. Send a direct message via [Your Team's Preferred Messaging Platform].
2. Follow up with an email.
3. If the issue remains unresolved, contact the relevant supervisor or manager."

Below you can find a detailed walkthrough, that explains the logic behind the template above.

Platform	Purpose	Guidelines	Response Time
Email 	For non-urgent, detailed communication that does not require an immediate response. Non-urgent matters include project updates, meeting minutes, and general inquiries.	- Subject Line: Craft a clear and concise subject line. For example, instead of "Project", use "Project X: Weekly Update". - Summary: Begin with a brief summary of the message. - Other: Use bullet points or numbered lists for clarity. Avoid using all caps or excessive exclamation points. Do not check emails during meetings or deep work sessions. Use the "delay send" feature to avoid disrupting others' personal time.	- Non-Urgent Emails: For emails that do not require immediate attention, we expect a response within 24 hours during the workweek. Urgent Emails: For emails that require immediate attention, please respond as soon as possible. If you cannot provide a detailed response immediately, send a brief reply acknowledging receipt of the email and provide a timeframe for when you can respond in detail. - Outside of Work Hours: We respect your personal time. If you choose to respond to emails outside of your work hours, please use the "delay send" feature to avoid disrupting others' personal time.
Written communication (eg. Microsoft Teams) 	For real-time collaboration and communication	- Use the "channel first" approach for communication to improve transparency. - Clearly state the purpose of	Respond within 1-2 hours during the work day.

	that requires immediate attention. Urgent matters include issues that may delay project timelines, critical updates, and immediate decisions.	the message or meeting. - Use @mentions to notify specific team members but avoid overuse. Ensure you tag the right crowd. - Avoid posting messages outside of designated work hours unless it's an emergency. - Check Teams regularly during work hours to stay updated.	
SharePoint and OneDrive 🍌	For collaborative document creation and sharing.	- Define the purpose and scope of the document before starting. - Assign clear roles and responsibilities to each team member. - Use comments for feedback and suggested edits. - Check the document regularly during work hours to stay updated on new edits or comments. However, avoid checking it outside of designated work hours unless it's an emergency.	Respond to comments and edits within 24 hours during the work week.
Video Meetings (eg. Microsoft Teams)	For scheduled, real-time discussions and collaborations.	- Schedule meetings at least 24 hours in advance. - Send an agenda and any relevant materials ahead of the meeting. - Avoid scheduling meetings outside of designated work hours unless it's an emergency.	Respond to meeting requests within 24 hours during the work week.

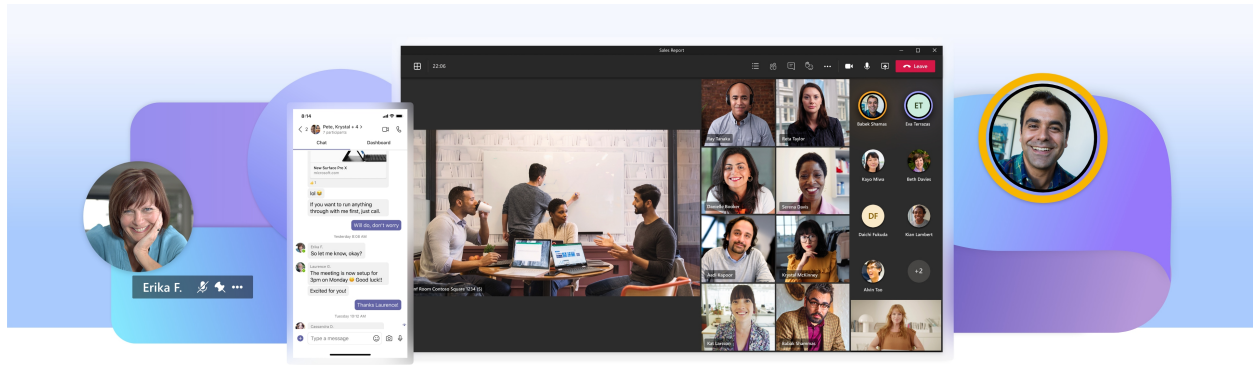
3.5.5 Escalation Procedures

For urgent matters that require immediate attention, escalate the issue through the following channels in order:

1. Send a direct message via Microsoft Teams.
2. Follow up with an email.
3. If the issue remains unresolved, contact the relevant supervisor or manager.

Each team should specify their own escalation procedures based on their unique needs and workflows. This protocol is intended to serve as a living document, subject to regular review and refinement, in order to ensure that it remains relevant and effective in the rapidly evolving world of remote work.

3.6 Microsoft Teams: How to Get the Most as a User







Microsoft Teams is a powerful tool that has become a cornerstone for many organizations navigating the shift to remote or hybrid work. As we adapt to this new work model, and it's essential to understand how to leverage Teams to maintain productivity, collaboration, and connection, regardless of where we are physically located.

- It enables us to stay connected through chat, calls, and meetings, reducing the fatigue associated with excessive meetings.
- It also allows us to collaborate in new ways and have more natural meeting experiences. Furthermore, Teams supports easy transitions across devices, whether we're at home, on the go, or in the workplace.


As we move forward, we'll be exploring the best practices for using Microsoft Teams in a remote or remote or hybrid work environment. We'll delve into the specifics of setting up and managing meetings, collaborating on documents, maintaining effective communication, and much more. Our goal is to ensure that every member of the team feels confident and capable when using Teams, thereby facilitating a smooth and productive remote or remote or hybrid work experience.

3.1 How to Maximize Channels and Tabs

Channels and tabs in Microsoft Teams can be used to organize work, streamline communication, and improve collaboration. Here are some best practices:

-  **Create Channels for Specific Topics or Projects:** For example, if you're working on a project named "Remote or Hybrid Work Model," create a dedicated channel for it. This way, all discussions, files, and meetings related to the project will be in one place.
-  **Use Tabs to Pin Important Files or Websites:** If there's a file or website that your team frequently uses, pin it as a tab at the top of your channel. For instance, you could pin a shared project plan or a useful resource website.
-  **Leverage @mentions to Draw Attention:** If you want to get someone's attention or assign a task, use @mentions. For example, you could write "@John, could you please update the project plan?"
-  **Use Channel Notifications Wisely:** To stay updated without getting overwhelmed, customize your channel notifications. You might choose to get notifications for all activity in important channels, and only for

@mentions in less critical ones.

-  **Keep Conversations in Threads:** Reply to a message using the 'Reply' button to keep the conversation in a thread. This keeps discussions organized and makes it easier for others to follow along.

3.2 What are the Top 10 Bots for Remote and Hybrid Work Challenges



Bots in Microsoft Teams can automate routine tasks, provide insights, and enhance productivity. Here are the top 10 bots that can help address remote or hybrid work challenges:






Name	Website	Description	Use-case example(s)	Best for:
Mio	Website	Mio allows you to communicate with people outside your organization who use different apps.	Communicating with contractors, suppliers, or clients that use Slack or Webex.	All, especially those who frequently communicate with external stakeholders.
Whobot	Website	Whobot helps you find people in your organization who have the knowledge you need.	Finding someone who knows about the latest product sales numbers.	All, especially those who need to collaborate across different teams or departments.
Zoom.ai	Website	Zoom.ai automates meeting schedules, reserves rooms, and provides contextual information.	Scheduling a meeting with a colleague in a different time zone.	All, especially those who frequently schedule meetings.
ScrumGenius	Website	ScrumGenius automates recurring communication workflows and can run daily standups, surveys, meetings, and ad-hoc reporting across timezones.	Running a daily standup meeting with a remote team.	Managers, especially those leading agile or scrum teams.
Growbot	Website	Growbot allows you to send kudos to anyone in your channel that needs a pat on the back.	Recognizing a team member for their hard work on a project.	All, especially those in teams that value recognition and positive reinforcement.
Workbot	Website	Workbot allows you to interact with external apps without having to leave Microsoft Teams.	Creating a new lead in Salesforce without leaving Teams.	All, especially those who frequently use external apps like Salesforce, Intercom, MailChimp, and Zendesk.
Polly	Website	Polly allows you to conduct and analyze polls or surveys in Teams.	Conducting a quick poll to get feedback on a new initiative.	Managers, especially those who value feedback and employee engagement.
Hypercontext	Website	Hypercontext is an agenda app for one-on-ones and team meetings.	Preparing for a one-on-one meeting with a direct report.	Managers, especially those who conduct regular one-on-ones or team meetings.

YellowAnt	Website	YellowAnt helps automate your work within Microsoft Teams by integrating with other apps.	Asking YellowAnt to list the issues on Github at a specific time.	All, especially those who frequently use external apps like Github, Gmail, Salesforce, and others.
Statsbot	Website	Statsbot pulls raw data from various points in your business environment and delivers it to you in the form of useful insights.	Asking Statsbot for sales data while preparing a report.	All, especially those who frequently need to access and analyze data.

Please note that the availability and functionality of these bots may vary, and it's always a good idea to check the latest updates from the bot developers or Microsoft Teams.

3.3 What are the best MS Teams AI-powered tools to support you?

Here are the top 5 AI-powered bots to boost productivity in Microsoft Teams.

Name	Website	Description	Use-case example(s)	Best for
T-Bot 	Website	T-Bot is the built-in AI bot in Microsoft Teams. It can answer most of your questions about how to use Teams.	Asking T-Bot how to schedule a meeting in Teams.	All, especially those new to Teams.
WhoBot 	Website	WhoBot uses AI to help you find information about anyone in your organization.	Asking WhoBot "Who knows about project management?"	All, especially those who need to collaborate across different teams or departments.
Cortana 	Website	Cortana, Microsoft's AI assistant, is integrated with Teams. You can use Cortana to set up meetings, send quick messages, or find information.	Asking Cortana to schedule a meeting with a colleague.	All, especially those who frequently schedule meetings.
Zoom.ai 	Website	Zoom.ai automates meeting schedules, reserves rooms, and provides contextual information.	Scheduling a meeting with a colleague in a different time zone.	All, especially those who frequently schedule meetings.
Polly 	Website	Polly allows you to conduct and analyze polls or surveys in Teams.	Conducting a quick poll to get feedback on a new initiative.	Managers, especially those who value feedback and employee engagement.

Please note that the availability and functionality of these bots may vary, and it's always a good idea to check the latest updates from the bot developers or Microsoft Teams.

3.4 How to get more personalized productivity insights

- **Microsoft Viva** is an Employee Experience Platform (EXP) that brings together communications, knowledge, learning, resources, and insights into an integrated experience. It's designed to empower people and teams to be their best, from anywhere.
 - **Microsoft Viva Insights** provides privacy-protected insights and actionable recommendations that help everyone in the organization work smarter and achieve balance. Along with Glint, Viva Insights helps managers and leaders understand work patterns and take steps to improve employee engagement and wellbeing. Daily polls enable us to keep a pulse on employee sentiment, and we have channels for employees to ask questions and share what's on their minds.
1. 🧑‍🤝‍🧑 **Use Viva Connections:** Viva Connections provides a single-entry point for employee engagement and internal communications. It's a gateway to your digital workplace where leaders can connect with employees via company town halls, and employees can access everything from company news, policies, and benefits to employee resource groups or communities they want to join.
 2. 📈 **Leverage Viva Insights:** Viva Insights gives individuals, managers, and leaders personalized and actionable privacy-protected insights that help everyone in an organization thrive. It brings new personal wellbeing experiences, insights, and recommended actions from Workplace Analytics and MyAnalytics into the flow of people's work in Microsoft Teams. As a leader, you can use Viva Insights to see if your team is at risk of burnout and provide recommendations like encouraging your team to turn off notifications, set boundaries in their calendar, and set daily priorities to focus on what matters most.
 3. 📖 **Promote Learning with Viva Learning:** Viva Learning helps make learning a natural part of both every employee's daily work and company culture. With Viva Learning, employees can easily discover and share everything from training courses to microlearning content. And managers get the tools they need to assign learning and to track the completion of courses to help foster a learning culture.
 4. 📄 **Harness Knowledge with Viva Topics:** Viva Topics enables you to harness the knowledge of your organization, and connect people to that knowledge, in the apps they use every day. It uses AI to automatically organize company-wide content and expertise into relevant categories like "projects," "products," "processes," and "customers." When you come across an unfamiliar topic or acronym, just hover over it. No need to search for knowledge—knowledge finds you.
 5. 🔧 **Integrate with Existing Systems:** Microsoft Viva is designed to be an open and extensible platform, with a strong and growing ecosystem of partners. It's easy to integrate with the systems and tools your company already has in place. Integrations with Microsoft 365, Microsoft Power Platform, Microsoft Dynamics 365, and third-party products and services will deliver a complete employee experience in the flow of work.

Remember, the goal of using Microsoft Viva is to make it easier and more natural for everyone to stay connected, access knowledge, learn on the job, and use privacy-protected insights. This will enable individuals to prioritize wellbeing, empower managers to lead more effectively, and help leaders drive better decision-making across the organization.

4. HOW TO MAKE REMOTE MEETINGS WORK?



TL'DR:

- The chapter provides practical tips for effective communication in a remote or hybrid team.
 - It discusses the role of technology in facilitating communication.
 - It emphasizes the importance of clear and consistent communication in a remote or hybrid work environment.
-
- Meetings in a remote environment are a blend of in-person and remote participation, **requiring a thoughtful approach to ensure inclusivity, engagement, and productivity.**
 - We understand that the success of a meeting in a remote environment hinges on clear communication, effective use of technology, and respect for diverse work styles and locations

- This section of the playbook is designed to guide you through the nuances of conducting meetings in a remote environment. It offers practical tips, best practices, and strategies to ensure that whether you're in the office, at home, or somewhere in between, your voice is heard, and your contributions are valued. Let's navigate this new world of meetings together, fostering a culture of collaboration and mutual respect.

4.1 How to Assess Your Meetings Culture 🕶️

- we believe in the power of reflection and continuous improvement. As we navigate the remote work environment, it's crucial to assess our current meetings culture. Are our meetings productive, inclusive, and valuable? Or have they become a default for any situation requiring input, a time management crutch, or a substitute for building team culture and cohesion?
- This section of the playbook invites you to **conduct a 'Meeting Audit'** - a step-by-step process to evaluate the effectiveness of your recurring meetings. Inspired by the 'Meeting Doomsday' exercise conducted by teams at Asana in 2022, this audit will help you identify meetings that lack value, optimize meeting practices, and ultimately save precious time.
- By launching a meeting audit, evaluating it step by step, scheduling your 'meeting doomsday', and celebrating the results, you'll be able to transform your meetings culture. You'll ensure that meetings are not just about ticking off an agenda, but about fostering collaboration, driving progress, and making every voice heard.
- Remember, it's not about eliminating meetings altogether, but about making them more meaningful and effective. So, let's dive in, assess our current meetings culture, and together, make our meetings a powerful tool for collaboration and innovation in our remote or hybrid work environment.

💡 **READY-TO-USE MATERIALS** 💡

▼ 🚀 Meetings Audit: Step-by-step [FRAMEWORK]

How can you tell you have a problem with meetings?

The problem arises when meetings become:

- The default for any situation that requires input from someone else.
- A time management crutch for leaders too overwhelmed to dig into issues.
- A shortcut to avoid clearly thinking through issues and documenting decisions.
- A lazy substitute for building team culture and cohesion.
- An easy way for insecure managers to feel important and in control.

Meetings audit: Step-by-Step



In 2022 teams at Asana conducted “Meeting Doomsday” exercise. This is the framework they followed.

1. Launch a meeting audit

- Many employees don't know how much time they squander in meetings. They often happen at different cadences - like every week or every six weeks - which can distort employees' perception of how much time they actually spend in meetings.
- The first step of doomsday involves conducting a meeting audit. Each employee evaluates their recurring meetings and identifies which ones lack value.

2. Evaluate it step by step

- **All recurring meetings should have a pre-qualification checklist.**

List of items that need to be completed for the meeting to occur (eg. creating a meeting agenda, everyone reviewing materials, etc).

- **Assign a pre-qualifier to ensure the list is always completed.**

Set someone as a pre-qualifier, and authorize them to remove the meeting if the checklist is incomplete.

- **All recurring meetings should also have a set evaluation date & a checklist.**

A regular time when you go through a meeting evaluation checklist to confirm that the timing, format, participants, objective, and meeting effectiveness are all still optimal.

- **Most recurring meetings should set a meeting end date.**

This is when you aim to complete the meeting objective and delete the call from your calendar.

3. Schedule your meeting doomsday

- 🧑 **Delete all recurring meetings.** This is when the best part of doomsday happens. During this part of the process, have your team delete all their recurring meetings from their calendars.
- 🙄 **Don't feel guilty.** Employees often feel that if they delete meetings, other attendees will take it as a personal affront. An official doomsday will give employees permission to delete their meetings without feeling guilty. Participants should get a blurb to share with cross-functional meeting participants to explain that doomsday was coming - and the intent behind it.
- 🧑 **Start fresh.** After deleting their meetings, have your employees sit with their newly cleansed calendars for 48 hours. Then, have them repopulate their calendars, but only with those meetings that are valuable--according to their own meeting audit.
- 📊 **Results?** Once employees were given the freedom to step back and assess, they changed many of their meetings to be shorter, unconventional lengths (like 15 minutes). They also changed the cadence of meetings to be less frequent.

4. Celebrate

- After conducting a meetings audit at Asana teams, it was found that **48% of the meetings were considered low value.**
- By implementing changes such as shortening meeting times, using clear agendas, and encouraging more asynchronous communication, the teams were able to **save a total of 265 hours per month.**
- What's more, **70% of the time savings came from changes other than canceling meetings,** highlighting the potential impact of optimizing meeting practices.

4.2 Why hybrid meetings are hard? 😊

1. **Inequity Between Remote and In-Person Participants:** Those in the office may have more opportunities to participate in discussions, while remote participants may feel overlooked. A 2021 Microsoft study found that remote meeting attendees speak up to 50% less than those in person.
2. **Lack of Non-Verbal Cues:** Non-verbal cues, such as body language or facial expressions, can be harder to interpret in a virtual setting, leading to misunderstandings. A 2021 study published in the Journal of Business and Psychology found that virtual teams have a higher risk of miscommunication due to the lack of non-verbal cues.
3. **Difficulty in Building Relationships:** Building relationships and fostering a sense of team cohesion can be more challenging in a hybrid setting. According to a 2020 study by Gartner, 54% of HR leaders reported that poor social connectivity posed a major barrier to successful remote work.
4. **Distractions and Multitasking:** Remote participants may be more prone to distractions or multitasking during meetings, which can lead to reduced engagement. A 2020 study by Zogby Analytics found that 40% of remote workers cited distractions at home as a challenge to their productivity.
5. **Lack of Clear Communication Protocols:** Without clear protocols for how to conduct hybrid meetings, they can become disorganized and inefficient. A 2021 survey by PwC found that 26% of companies did not have established protocols for virtual meetings, leading to confusion and inefficiency.
6. **Difficulty in Maintaining Engagement:** Keeping both in-person and remote participants engaged during a hybrid meeting can be challenging. A 2021 report by Slack found that 45% of newly remote workers reported difficulties staying engaged during virtual meetings.
7. **Lack of Effective Meeting Facilitation:** Without a skilled facilitator, hybrid meetings can become one-sided or chaotic. A 2020 survey by the Institute of Corporate Productivity found that only 16% of companies provide training for leading virtual meetings.
8. **Challenges in Collaborative Decision-Making:** Making decisions collaboratively can be more difficult in a hybrid setting due to communication barriers. A 2021 study by the Harvard Business Review found that decision-making was one of the top challenges faced by hybrid teams.

9. **Difficulty in Managing Meeting Duration:** Hybrid meetings can often run longer than necessary due to technical issues or difficulties in coordinating between in-person and remote participants. A 2021 survey by Doodle found that 38% of employees felt that meetings were often longer than they needed to be.
10. **Challenges in Creating an Inclusive Environment:** Ensuring that all participants, regardless of their location, feel included and valued can be challenging in a hybrid setting. A 2020 study by Buffer found that 20% of remote workers reported feeling isolated or excluded during hybrid meetings.

4.3 How to Create a Personalized 1:1 Meeting Framework

- Effective communication is the cornerstone of successful teamwork. One of the most powerful tools in our communication arsenal is the 1:1 meeting. These meetings are a chance for **managers and team members to connect, collaborate, and align on goals and expectations.**
- In a remote work environment, 1:1 meetings take on an even greater significance. They serve as a dedicated space for open dialogue, feedback, and personal connection, bridging the physical distance between team members. However, to unlock the full potential of these meetings, it's essential to approach them with a clear structure and purpose.
- Creating a personalized 1:1 meeting framework allows you to tailor these interactions to the unique needs and preferences of each team member. This framework should be flexible, adaptable, and designed to facilitate meaningful and productive conversations. It should provide a roadmap for the meeting, outlining key discussion points, feedback mechanisms, and follow-up actions, while also leaving room for spontaneous discussion and personal connection.
- Remember, a successful 1:1 meeting is a two-way street. It's not just about providing feedback, but also **about listening, understanding, and responding to your team member's needs.** By creating a personalized 1:1 meeting framework, you'll be able to make the most of these interactions, driving individual growth, team cohesion, and overall productivity in our remote work environment.

 **READY-TO-USE MATERIALS** 

▼ **1:1 Remote and hybrid Meeting Framework [Step-by-step Process & 5 x Templates]**



We've developed a customizable framework for 1:1 meetings, designed to transform these interactions into a source of insight and growth. Here's how it works:


PREPARATION

Step 1: Understand the Purpose 

Before you even schedule a 1:1 meeting, it's important to understand its purpose. These meetings are not just status updates; they are opportunities for meaningful dialogue, personal growth, and relationship building.

Step 2: Schedule Regular Meetings

Consistency is key. Schedule regular 1:1 meetings with each of your team members. This could be weekly, bi-weekly, or monthly, depending on your team's needs.

 *Example:* "I've set up a recurring meeting for our 1:1 discussions. You'll see an invite in your calendar."

Step 3: Set the Agenda

Before each meeting, prepare an agenda. This should include key discussion points, feedback, and any specific issues or projects you want to discuss. Share this agenda with your team member ahead of time.


 *Template Agenda:*

1. Updates on [specific task or project],
2. Discussion on [topic or issue],
3. Feedback and suggestions,
4. Next steps.

MEETING

Step 4: Set the Stage


Before the meeting, send a message to your team member outlining the purpose of the meeting and what you hope to achieve. This helps set expectations and ensures everyone is on the same page.

 *Template Message:*

"Hi [Team Member], I'm looking forward to our 1:1 meeting this week. I'd like to discuss [topics] and hear your thoughts on [specific issues or projects]. Please feel free to add any items to our agenda that you'd like to discuss. Thanks!"


Step 2: Create a Safe Space

Ensure that the meeting environment, whether physical or virtual, is comfortable and conducive to open communication. This means eliminating distractions and fostering a sense of trust and respect.

 *Example:* "I've booked a quiet meeting room for our chat, but if you'd prefer to talk in a different setting, just let me know."

Step 3: Listen Actively


During the meeting, focus on listening to your team member's thoughts, concerns, and ideas. Ask open-ended questions to encourage deeper discussion and show that you value their input.

 *Example Question:* "Can you tell me more about the challenges you're facing with [specific task or

project]?"


Step 4: Provide Constructive Feedback

Offer feedback that is specific, actionable, and framed positively. Remember, the goal is to help your team member grow and improve, not to criticize or demotivate.

 *Example Feedback:* "I've noticed you've been doing great work on [specific task or project]. One area where I think you could make an even bigger impact is [suggestion]."

Step 5: Follow Up

After the meeting, send a follow-up message summarizing the key points discussed and the next steps. This helps ensure clarity and accountability.

 **Template Message:*

"Hi [Team Member], thanks for the productive discussion during our 1:1 meeting. Here's a summary of what we discussed and the action items moving forward: [summary and action items]."


Remember, this is a framework, not a rigid set of rules. Feel free to adapt it to suit your management style and the needs of your team members. The goal is to make 1:1 meetings a valuable experience for everyone involved.


[Source]

4.3 How to leverage meeting templates


- In the dynamic world of remote work, efficiency and productivity are key. A well-structured meeting can save time, clarify objectives, and boost collaborative efforts. This is where meeting templates come into play.
- Meeting templates serve as blueprints for meetings. They **provide a structure to set clear agendas, define roles, and ensure every voice is heard**. The beauty of these templates is their reusability. Once a solid template is in place, it can be used repeatedly, with modifications to fit different situations.
- Teams Premium allows IT admins to create custom Meeting Templates for different types of meetings (customer calls, brainstorming meetings, help desk calls, etc.). These templates can automatically include the correct settings, reducing the time required to set up meetings.
- Several example templates have been created for immediate use. These templates are designed with flexibility in mind, allowing for adaptation to specific needs. While these templates provide a solid starting point, their true potential is realized when they are personalized.

Meeting Type	Purpose	Optimal Time Slot	Template link
Brainstorming Session	For generating new ideas and solutions	60 minutes	[Add Link]
Client Meeting	For discussing projects, updates, or issues with clients	45-60 minutes	[Add Link]
Crisis Meeting	For addressing urgent issues or crises	30-45 minutes	[Add Link]
Decision-Making Meeting	For making important team decisions	45-60 minutes	[Add Link]
Feedback Session	For providing constructive feedback and discussing improvements	30-45 minutes	[Add Link]
One-on-One	For individual feedback and personal development discussions	30-60 minutes	[Add Link]
Project Kick-Off	For initiating a new project or phase	60 minutes	[Add Link]
Project Review	For reviewing the progress or results of a project	60 minutes (with a 10-minute break)	[Add Link]
Team Building	For strengthening team relationships and morale	60-90 minutes (with a 15-minute break)	[Add Link]
Training Session	For teaching new skills or procedures	60-120 minutes (with a 15-minute break every hour)	[Add Link]

 [Remote all-hands meeting](#)

 [Remote one-on-one](#)

 [Team meeting template](#)

 ['State of Me': Pre-Meeting Template](#)

4.4 What is our Hybrid Meeting Etiquette

- We're no strangers to innovation and adaptation, and **hybrid meetings are our (new) reality.**
- They come with their own set of challenges, but also open up exciting opportunities for flexibility and inclusivity

- Here's how we can make the most of our hybrid meetings, keeping them engaging, productive, and respectful.



Professionalism and Respect

we're all about respect and professionalism. In the context of hybrid meetings, this means:

- **Setting clear expectations:** Let's share the agenda, objectives, and any pre-reading materials ahead of time. This way, we all come prepared, ready to dive into a focused and productive discussion.
- **Being punctual:** Time is valuable. Starting and ending meetings on time shows we respect each other's schedules and commitments.
- **Encouraging participation:** Everyone in our team has a unique perspective to offer. Let's make sure we hear from everyone, especially those who might be quieter or joining remotely.

Effective Communication and Active Participation

Communication is the key to our success. Here's how we can enhance it during our remote meetings:

- **Use visual aids:** Visual aids can help clarify complex points and keep everyone engaged. They're especially helpful for our remote teammates who might not have the same visual cues as those in the office.
- **Practice active listening:** Let's show we value each other's input by giving our full attention, summarizing key points to confirm understanding, and responding thoughtfully.
- **Promote open dialogue:** We're a team of innovators. Let's encourage everyone to share their thoughts and ideas, creating a safe and inclusive environment where differing opinions are welcomed and respected.

Leveraging Technology

Technology is our ally in making remote meetings effective. Here's how to make the most of it:

- **Choose the right platform:** We're already using reliable tools like Microsoft Teams that support screen sharing and offer good audio and video quality.

- **Test your tech:** A quick tech check before the meeting can help us avoid technical glitches and keep the focus on the discussion.
- **Use collaboration tools:** Tools like Miro or Microsoft Whiteboard can make our meetings more interactive and collaborative.

Navigating Challenges and Opportunities

remote meetings come with their own set of challenges and opportunities:

- **Addressing technical issues:** Let's be prepared for potential technical issues, like a shaky internet connection or software glitches. Having a backup plan, like a dial-in option, can save the day.
- **Balancing in-person and remote participation:** We're one team, no matter where we're joining from. Let's make sure our remote teammates are actively involved in the discussion and feel as included as those in the office.
- **Embracing flexibility:** remote meetings offer us the opportunity for greater flexibility. Let's be open to different meeting times or formats that accommodate everyone's needs.

5. HOW TO COLLABORATE IN AS A REMOTE TEAM





TL'DR:





- The chapter provides strategies for fostering effective collaboration in a remote or hybrid team.
- It discusses the role of technology in facilitating collaboration.
- It emphasizes the importance of building trust and fostering inclusivity in a remote or hybrid team.

5.1 How to Foster Innovation and Creativity



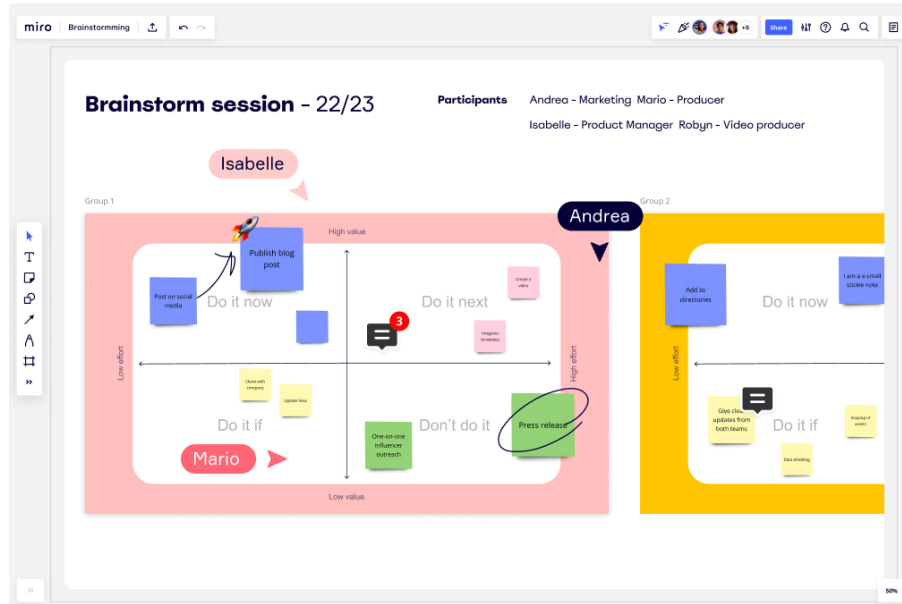
Collaboration is an important aspect of any work environment, but it can also **be a time-consuming activity**. According to the Harvard Business Review, the time spent by employees on collaboration has increased by 50% over the past two decades.

- In a remote work environment, fostering innovation and creativity is crucial for maintaining a competitive edge and driving team success.
- This can be achieved through a variety of strategies and tools.
- Hope these resources, tools, and templates below will enable you and your team to be as creative as Picasso - just in a remote setup!

<i>Approach</i>	<i>Description</i>	<i>Resource Idea</i>
 Continuous Learning	Encourage a culture of continuous learning within your team. This could involve creating a shared repository of learning resources, promoting relevant webinars or workshops, or even setting up a team book club.	A template for a "Learning Resources List" could be a great starting point, allowing team members to add and access resources in a centralized location.
 Idea Sharing	Facilitate opportunities for team members to share their ideas and insights. This could be done through regular brainstorming sessions, or by using digital tools like an idea board.	A "Brainstorming Session Guideline" could provide a structured approach to these sessions, ensuring that all voices are heard and ideas are effectively captured.
 Celebrating Innovation	Recognize and celebrate innovative ideas and solutions within your team. This could be done through shout-outs during team meetings, or by establishing a dedicated "Innovation Award".	This not only acknowledges the efforts of your team members but also encourages a culture of innovation within the team.
 Leveraging Digital Tools	Tools like Miro can be incredibly effective for fostering creativity and collaboration in a remote team.	Consider creating a guideline on how to use Miro to its fullest potential, ensuring that all team members are comfortable with the tool and can contribute effectively.

5.2 How to Maximize Miro for Collaboration

Miro is a versatile tool that can significantly enhance collaboration and creativity in a remote or hybrid work environment. Here's a guide to help you maximize its potential:



100 1. Understand Miro's Core Features

Miro offers a wide range of features. Here are the top 10 you should familiarize yourself with:

- **Infinite Canvas:** Miro's canvas expands as you add more content, providing ample space for all your ideas.
- **Sticky Notes:** Use these for brainstorming sessions, feedback, or quick reminders.
- **Shapes and Lines:** These can help structure your thoughts and ideas visually.
- **Frames:** Use frames to create separate sections within your board.
- **Comments and Mentions:** Collaborate effectively by adding comments and mentioning team members.
- **Voting:** This feature is useful for decision-making and prioritizing ideas.
- **Timer:** Keep your meetings and brainstorming sessions on track.
- **Screen Sharing:** Share your screen directly within Miro.
- **Presentation Mode:** Present your boards in a structured way.
- **Handwriting Recognition:** Miro can convert your handwriting into text.

2. Golden Rules for Virtual Brainstorming Sessions

When hosting a virtual brainstorming session on Miro, consider these rules:

- **Prepare in Advance:** Set up the Miro board before the session. Include instructions and any necessary materials.

- **Set Clear Objectives:** Make sure everyone knows the goal of the session.
- **Encourage Participation:** Ensure everyone has a chance to contribute.
- **Use the Timer:** Keep the session focused and on track.
- **Review and Summarize:** At the end of the session, review the ideas and summarize the key points.

3. Explore Miro's Templates

Miro offers a variety of templates that can streamline your workflow. Here are 10 templates that could be particularly useful:

- [Project Planning](#)
- [Kanban Board](#)
- [Mind Map](#)
- [SWOT Analysis](#)
- [User Story Map](#)
- [Retrospective](#)
- [Flowchart](#)
- [Product Roadmap](#)
- [Empathy Map](#)
- [Customer Journey Map](#)

 **READY-TO-USE MATERIALS** 



✓ 4. Miro Meeting Checklist

To ensure your Miro meetings run smoothly, follow this checklist:

Pre-Meeting:

- Set up the Miro board.
- Share the board link with participants.
- Prepare any necessary materials or templates.

During the Meeting:

- Encourage active participation.
- Use the timer to keep the meeting on track.
- Use comments and mentions for effective collaboration.

Post-Meeting:

- Summarize the key points.
- Follow up on any action items.
- Archive the board for future reference.

5.3 Problem-Solving in a Remote Environment 🧑

1. Encouraging Open Dialogue

Leaders play a crucial role in fostering an environment of open dialogue. Here are some actionable ways leaders can encourage open dialogue:

- **Lead by Example:** Leaders should demonstrate open dialogue by being transparent about their thoughts, ideas, and even their vulnerabilities. This can show team members that it's okay to express themselves openly.
- **Active Listening:** Leaders should practice active listening during conversations. This means fully focusing on the speaker, avoiding interruptions, and responding thoughtfully.
- **Encourage Questions:** Leaders should encourage team members to ask questions during meetings and discussions. This can stimulate dialogue and show team members that their input is valued.
- **Open Door Policy:** Implement an open door policy where team members feel comfortable approaching leaders with their ideas, concerns, or issues.
- **Regular Check-ins:** Schedule regular check-ins with team members to discuss their thoughts, ideas, and any concerns they may have. This can help to build trust and promote open dialogue.

2. Conflict Resolution Procedure Template

Step 1: Identify the Issue

Clearly define the conflict or issue that needs to be resolved. This should be a neutral statement that outlines the problem without blaming anyone.

Step 2: Understand Everyone's Perspective

Give each party involved in the conflict a chance to express their perspective. This should be done in a respectful and non-judgmental manner.

Step 3: Find Common Ground

Identify any areas of agreement between the parties. This could be shared goals, values, or interests.

Step 4: Explore Possible Solutions

Brainstorm possible solutions to the conflict. Each party should have the opportunity to suggest solutions.

Step 5: Agree on a Solution

Discuss the proposed solutions and agree on one that is acceptable to all parties. This may involve compromise from all sides.


Step 6: Implement the Solution

Put the agreed solution into action. This may involve changes to work processes, communication strategies, or behaviors.

Step 7: Review and Adjust

After a set period of time, review the effectiveness of the solution. If necessary, make adjustments or try a different approach.

Remember, conflict resolution requires patience, understanding, and a willingness to compromise. It's important to approach the process with an open mind and a focus on finding a solution that benefits everyone involved.

 **READY-TO-USE MATERIALS** 

Feedback Session Agenda [TEMPLATE]

Meeting Date: [Insert Date]

Meeting Time: [Insert Time]

Location: [Insert Location or Video Call Link]

Attendees: [Insert Attendee Names]

Agenda

1. Introduction (5 minutes)

- Welcome and purpose of the meeting
- Ground rules for the session (e.g., respect for each other's views, confidentiality, etc.)

2. Review of Performance/Objectives (10 minutes)

- Review of the individual's key achievements and challenges since the last feedback session

- Discussion of any obstacles encountered and how they were handled

3. Feedback from Manager (15 minutes)

- Specific, constructive feedback on the individual's performance
- Discussion of areas of strength and areas for improvement

4. Feedback from Individual (15 minutes)

- Individual's self-assessment of their own performance
- Feedback on their experience in the team/project, including any challenges or issues they've faced

5. Discussion and Action Plan (10 minutes)

- Discussion of feedback and any discrepancies between the manager's and individual's perceptions
- Agreement on an action plan for addressing any issues or areas for improvement

6. Next Steps (5 minutes)

- Setting of objectives for the next period
- Scheduling of the next feedback session

Please note that the times are just suggestions and can be adjusted based on the needs of the meeting. The key is to ensure that there is enough time for a thorough discussion and that both the manager and the individual have the opportunity to give and receive feedback.

5.4 How to change your decision-making process to be more effective (and async-friendly) 🧑

5.4.1 What are the challenges in a remote decision-making process

1. **Inefficient Decision-Making Process:** Traditional decision-making often involves numerous meetings and discussions, which can be time-consuming and inefficient. According to a study by Harvard Business Review, executives spend an average of nearly 23 hours a week in meetings, up from less than 10 hours in the 1960s.
2. **Lack of Clarity and Context:** Without a clear process, decisions can be made without sufficient context or understanding of the issue at hand. This can lead to poor decisions and misunderstandings among team members.
3. **Difficulty in Reaching Consensus:** In a remote environment, it can be challenging to reach a consensus due to differences in time zones, communication styles, and availability. This can delay decision-making and create frustration among team members.

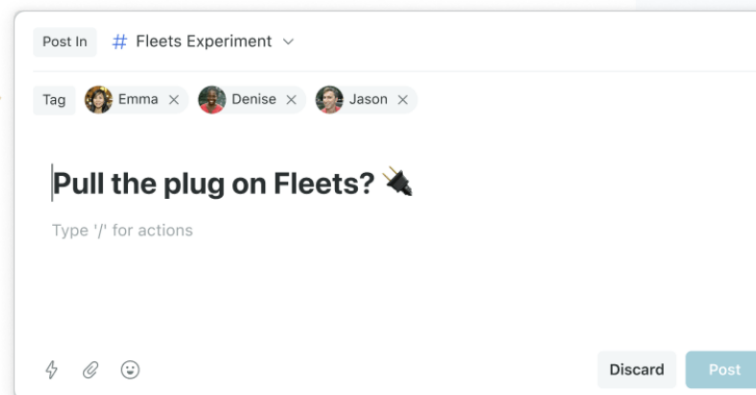
4. **Over-reliance on Synchronous Communication:** Many teams rely heavily on synchronous communication for decision-making, which can exclude those who are unable to attend meetings due to time zone differences or other commitments. This can lead to decisions being made without input from all relevant stakeholders.
5. **Lack of Documentation:** Without a structured decision-making process, decisions and the reasoning behind them may not be adequately documented. This can make it difficult for team members to understand why a decision was made and can create confusion if the decision needs to be revisited in the future.

5.4.2 Use this step-by-step process to fix this

#1 Loop in the right people

Every decision should ideally have one decision maker and fewer than five stakeholders to provide input.

Ideally 1 decision maker and <5 stakeholders for input



#2 Set context

The decision maker should start an async thread or decision doc with:

- List of people involved
- Context Recommended option
- List of options considered with pros and cons

The screenshot shows a Slack message in a channel named 'Fleets Experiment'. The message is from Lovelyn S. and is titled 'Pull the plug on Fleets?'. The message content is as follows:

Hi all, it's been 18 months since we launched Fleets. It's time to decide whether to continue to invest in this feature or pull the plug.

People:

1. Decision maker: @Jason (VP)
2. Driver: @Lovelyn (PM)
3. Stakeholders: @Denise (Consumer lead), @Emma (Ads lead)

Deadline:

7/14/2021

Recommendation:

Remove Fleets in July.

Rationale:

We introduced Fleets on 11/2020 to make it easy for more people to share their lives and join the conversation. However, based on our long-term Fleets holdout, the number of people creating content remains flat at 1% with Fleets. Meanwhile, we're seeing -5% negative ad revenue due to Fleets pushing the ads down.

Removing fleets will alleviate negative ad impact and give more space at the top of the timeline for other features that are showing more promise (e.g., Twitter Spaces). We will also transition our Fleets compose features to Twitter's default composer to make it easier for people to share photos and videos.

Other options considered:

1. Pause fleets: Does not address negative ad impact.
2. Invest in fleets: We could build an ad unit in fleets but that requires further thinking.

Callout boxes on the left side of the message highlight the following elements:

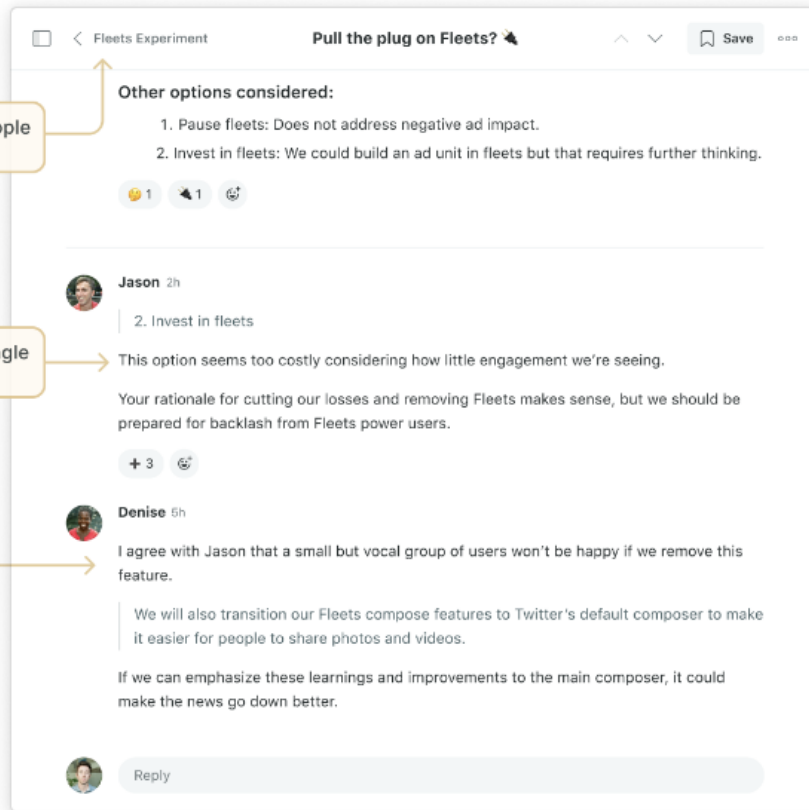
- List the people involved**: Who's the decision maker and who are the stakeholders? (Points to the 'People:' section)
- Include a deadline**: To ensure the discussion doesn't stretch on forever. (Points to the 'Deadline:' section)
- Include your recommendation up top**: Don't bury the lede. (Points to the 'Recommendation:' section)
- Summarize your rationale**: Be concise. (Points to the 'Rationale:' section)
- List other options considered**: Number the options so it's easy to refer back to them. (Points to the 'Other options considered:' section)

#3 Use one channel for communication

Avoid starting a bunch of separate threads and then having to play a game of telephone to figure out who said what.

Choose a channel where people will be able to find it later

Keep input organized in a single thread that will stay on topic

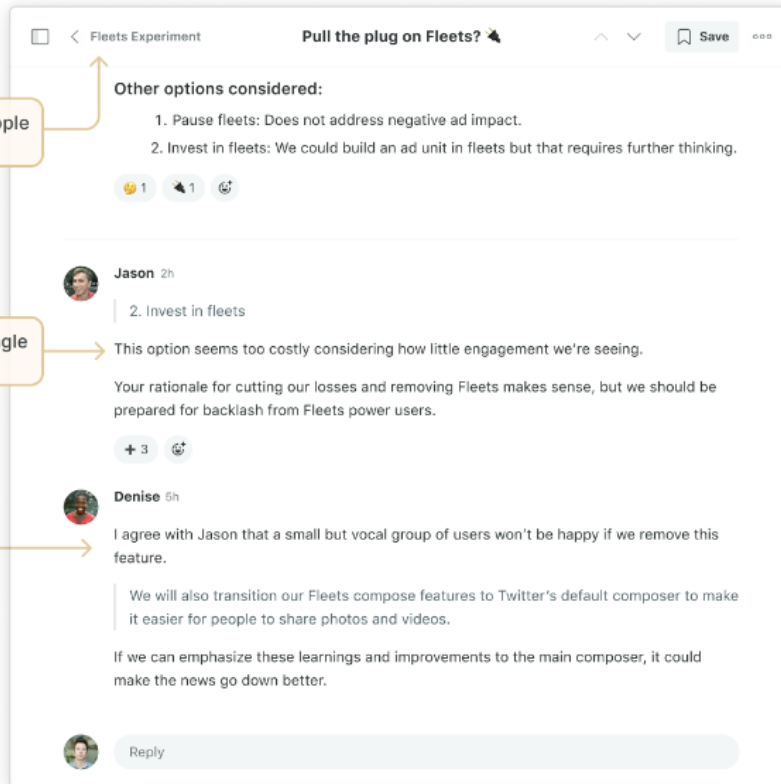


4. Keep the feedback loop structured

- Encourage people to provide input in a list format for easy readability.
- Use numbered lists vs. bullets to make it easier for people to respond (e.g. "I agree with #1").

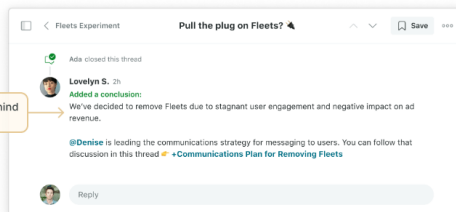
Choose a channel where people will be able to find it later

Keep input organized in a single thread that will stay on topic

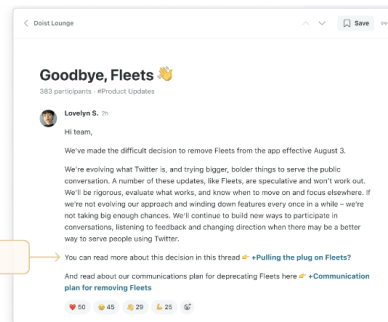


5. Document and share

Summarize the rationale behind the decision



Include a link back to the original discussion



Source: [Twist](#)

6. HOW TO EFFECTIVELY MANAGE A REMOTE TEAM?




TL'DR:

- The chapter discusses the unique challenges of leading a remote or hybrid team.
- It provides strategies for effective leadership in a remote or hybrid work environment.
- It emphasizes the importance of adaptability and flexibility in leadership.

6.1 How to Manage Remote Teams in 11 steps

Leading a remote team presents unique challenges and opportunities compared to managing a fully remote or fully in-person team. The blend of remote and in-office work requires a nuanced approach that takes into account the diverse needs and experiences of team members across different locations. This section outlines key aspects that leaders should consider when managing a remote team. From promoting inclusivity to breaking down silos, these points provide a roadmap for effective leadership in a remote work environment. By understanding and addressing these aspects, leaders can create a productive, inclusive, and balanced work environment for all team members, regardless of where they choose to work.

1. **Set Clear and Realistic Expectations:** Define SMART (Specific, Measurable, Achievable, Relevant, Time-bound) goals for each team member. Regularly communicate and be flexible with the challenges of remote work. Ensure your team has the necessary resources and tools to complete their tasks effectively. 

2. **Build Trust and Promote Inclusivity:** Be open and transparent about company policies, changes, and decisions. Show empathy towards your team's challenges and consistently recognize their efforts. Ensure all team members, regardless of their location, feel included and valued. This is critical in a remote or hybrid environment where remote employees may feel left out. 💕
3. **Maintain Team Cohesion and Break Down Silos:** Foster a sense of team unity, which can be more challenging when team members are not all in the same location. Look for ways to build connections between departments within your organization. One way to do this is through recurring Group Conversations, where each team provides updates about their work. These meetings should be open to the whole company and operate on a rotating schedule. 🍌
4. **Streamline Communication and Operate Asynchronously:** Remote or Hybrid teams face increased complexity in communication due to the mix of remote and in-person interactions. Leaders need to facilitate effective communication strategies to overcome this challenge. Make use of asynchronous communication tools that allow team members to respond when they're available. 📞
5. **Adapt Leadership Styles for Remote or Hybrid Work:** Leaders may need to shift their leadership style to effectively manage a hybrid team, focusing more on results rather than hours worked, and increasing emphasis on communication and trust-building. 🎯
6. **Focus on Output for Performance Evaluation:** Traditional metrics like time spent in the office become less relevant in a remote or hybrid team. Instead, leaders need to focus more on output and results when assessing performance. 📈
7. **Encourage Work-Life Balance:** With some team members working remotely, leaders need to encourage healthy work-life boundaries to prevent burnout. ⌚
8. **Manage Different Work Environments Effectively:** Ensure that both remote and in-office employees have the resources they need to succeed, which can require different strategies and tools. 🏢🏠
9. **Provide Equitable Training and Development Opportunities:** Regardless of their location, all team members should have access to training and development opportunities. This can be a challenge in a hybrid team that leaders need to address. 🎓
10. **Create a Handbook, Set Goals, and Document Processes:** A handbook-first approach to documentation is foundational to any well-run business at scale. Each department's quarterly goals should be clearly documented for visibility across the company. This builds transparency around what each team is accomplishing. 📖
11. **Handle Time Zone Differences:** When scheduling meetings, consider the time zones of all team members. Try to schedule meetings at a time that is convenient for everyone. If you have to schedule meetings at inconvenient times, try to rotate them so that no one team member is always inconvenienced. 🌐

6.2 How to Make Team Development work in the Remote World 🌐

- In the remote work environment, team development takes on a new dimension. It's no longer just about fostering skills and competencies, but also about bridging the gap between remote and in-person team members, ensuring everyone feels included, heard, and valued. This section provides a step-by-step guide to nurturing team development in a remote work setting. It emphasizes the importance of understanding

your team's developmental stage, fostering emotional safety and open communication, aligning on vision and goals, and continually reassessing and adjusting your strategies.

- These steps are designed to help managers navigate the unique challenges of remote work and lead their teams towards success. Let's delve into these steps in more detail.

Step	Description	Key Actions
1: Assess the Team's Developmental Stage 📊	Understand where your team is on their developmental journey. Use any framework you prefer, such as Tuckman's stages of group development (forming, storming, norming, performing) or Susan Wheelan's Integrated Model of Group Development.	Gather perceptions from each team member about the team's current stage. Spark a conversation and reach a shared understanding.
2: Foster Emotional Safety and Open Communication 🗣️	Create an environment where everyone feels safe to speak openly and honestly.	Encourage active engagement and participation from all team members. Promote understanding and trust within the team. Cultivate self-awareness and discourage blame. Manage conflicts collectively and constructively. Ensure inclusivity and value diversity. Facilitate effective feedback exchange. Celebrate individual strengths and contributions. Align the team towards a common goal.
3: Align on Vision and Goals 🎯	With a clear understanding of the team's developmental stage and a strong foundation of emotional safety and open communication, it's time to align on the team's vision.	Decide how to bring that vision to life through clear and measurable goals. Use the excellent communication your team has cultivated to keep things running smoothly and successfully.
4: Continual Reassessment and Adjustment ↻	Team development is not a one-time event but a continuous process.	Regularly return to Step 1 to reassess the team's developmental stage and adjust your strategies accordingly. This ongoing cycle of assessment, communication, alignment, and adjustment is the key to maintaining a healthy, high-performing team in a hybrid work environment.


Remember, the journey to becoming a high-performing team is iterative and requires commitment from all team members. With patience, open communication, and regular check-ins, your team can navigate the challenges of remote work and achieve new heights of success.

6.3 How to make the most of “People Manager OS” 🙏

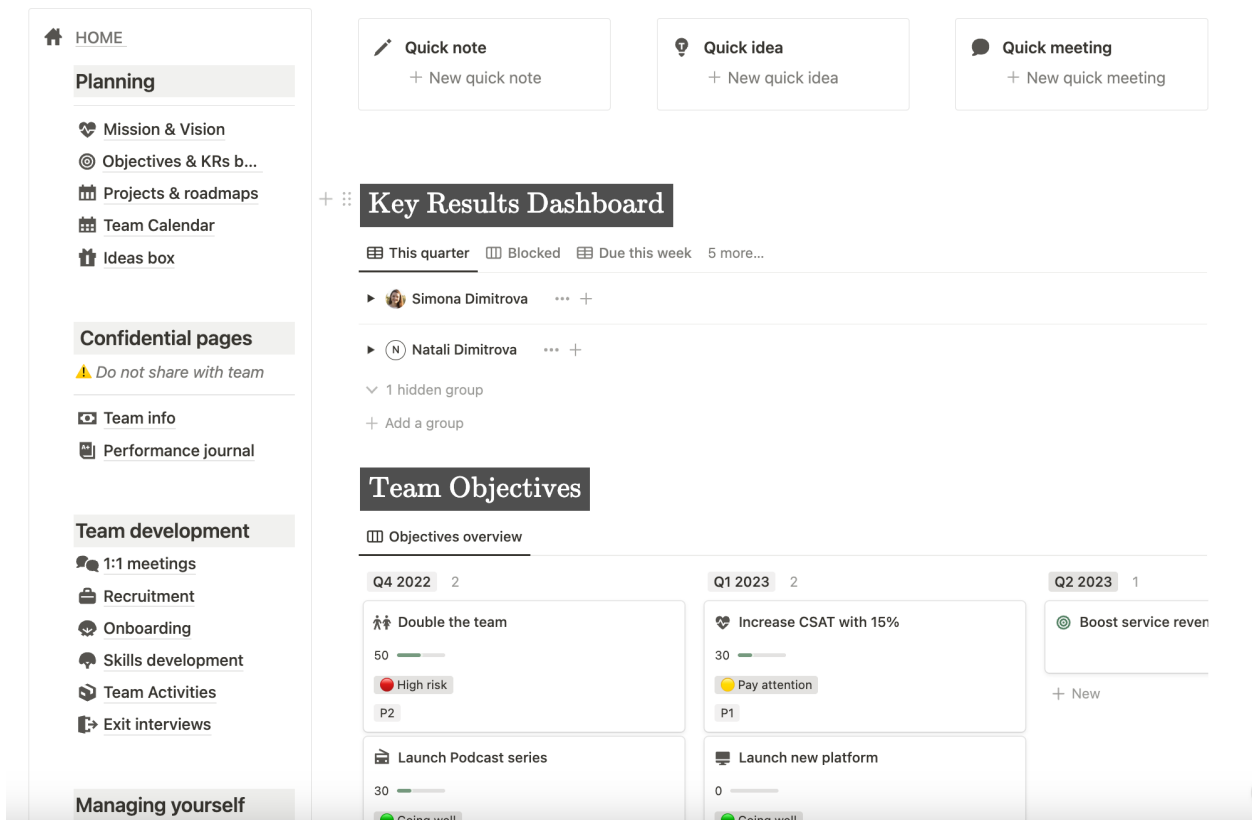



Introducing the People Manager OS: A revolutionary, all-in-one system designed specifically for people leaders, built on the powerful Notion platform. This is not just a tool, it's a game-changer for managing your team!

Check it out and personalize it accordingly to your needs:

 [People Manager OS \[TEMPLATE\]](#)

Manager OS [TEMPLATE]



 **Personalized Productivity Space:** Imagine having a personalized space where you can manage your team's daily, weekly, and quarterly activities, all in one place. No more juggling between different apps or platforms!


 **Over 30 Ready-to-Use Templates:** The Manager

 **Easy Navigation:** With a user-friendly left-side menu, you can effortlessly navigate between different areas such as Objectives, 1:1s, Development, Projects, and more. It's like having a command center at your fingertips!

 **Detailed User Guide:** Not sure how to use a

OS comes packed with over 30 templates and portals for Recruitment, Onboarding, Project Management, Calendars, Agendas, and more. These ready-to-use resources will save you valuable time and ensure consistency across your team.

particular portal or template? No problem! The Manager OS includes a detailed user guide to help you understand how to use each feature effectively. It's like having a personal coach guiding you every step of the way!

 **Transform Your Leadership:** With the Manager OS, you're not just managing your team - you're leading them into a new era of productivity and efficiency. Get ready to revolutionize the way you lead!

 **READY-TO-USE MATERIALS** 

▼  **Get a ready-to-use “Project Template”**

1. Project Charter

Project Name: [Project Name]

Project Objective: [Briefly describe the objective of the project]

Project Scope: [Outline what is included in the project and what is not]

Project Stakeholders: [List all the stakeholders involved in the project]

Project Timeline: [Provide an estimated start and end date for the project]

Project Budget: [Provide an estimated budget for the project]

2. Communication Plan

Communication Tools: [Specify the tools that will be used for communication, e.g., Microsoft Teams for real-time communication, SharePoint for document sharing]

Communication Frequency: [Specify how often updates will be shared and meetings will be held]

Roles and Responsibilities: [Specify who is responsible for communicating updates, organizing meetings, etc.]

3. Project Schedule

Task List: [List all the tasks that need to be completed for the project]

Task Owners: [Specify who is responsible for each task]

Task Deadlines: [Specify the deadline for each task]

Task Status: [Track the status of each task, e.g., not started, in progress, completed]

4. Risk Management Plan

Potential Risks: [List potential risks that could impact the project]

Risk Mitigation Strategies: [Outline strategies for mitigating each risk]

5. Project Closure Report

Project Outcomes: [Summarize the outcomes of the project]

Lessons Learned: [Share any lessons learned during the project]

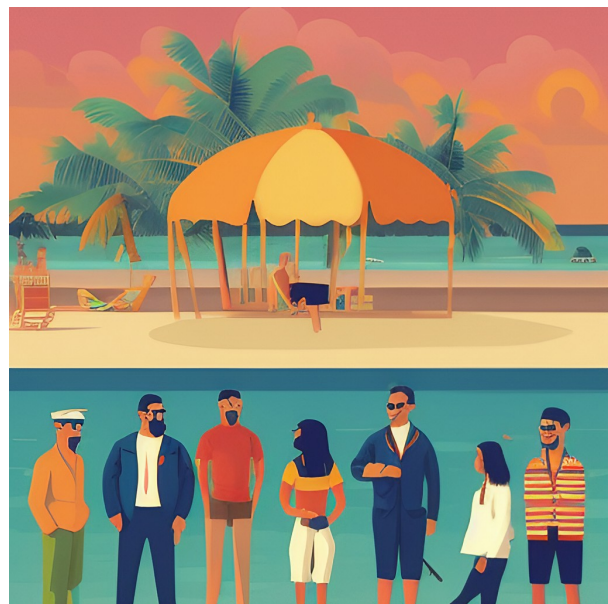
Recommendations for Future Projects: [Provide any recommendations for improving future projects]

6.4 How to Make Team Building Work in a Remote Environment 🧑‍🏭

The Remote Work Audit (April 2023), revealed that:

27% of employee said their team lacks a habit of team building touch points.

It showed that current team building is not intentional - recurring activities, driven by People Leaders, are missing. Teams do not always celebrate successes together. It's time to help People Leaders make this work, in the most efficient and effective way possible.



- In today's remote work environment, team leaders often find themselves wearing the hat of a "community manager". This role involves fostering a sense of community and belonging among team members, regardless of their physical location.
- While team building in a remote work environment comes with its own set of challenges, with careful planning, creativity, and a commitment to inclusivity, these challenges can be turned into opportunities for fostering a stronger, more resilient team.

6.4.1 What are the rules to follow?

1. 😊 The Importance of Team Building

Team building is a crucial aspect of this role. It's about more than just productivity; it's about creating a sense of camaraderie and mutual understanding among team members. In a remote setup, team building activities need to be inclusive, engaging both remote and in-office employees.

For example, GitLab, a remote-first company, hosts a virtual "coffee chat" where team members are randomly paired to have a casual conversation.

2. 🎯 Intentionality in Team Building

One of the key differences in team building for a remote environment is the need for intentionality. Unlike in a traditional office setting, where team building can occur organically through casual conversations and shared experiences, in a remote environment these interactions need to be planned and facilitated. This might involve scheduling regular virtual social events, or setting aside time in meetings for non-work-related discussions.

Atlassian, for instance, uses a tool called "Team Playbook" which has a variety of plays to suit different team dynamics and situations.

Atlassian Team Playbook - Build strong teams with Plays

Plays are free workshop resources for addressing common team challenges and starting important conversations.

<https://www.atlassian.com/team-playbook>

3. 🧑🏻‍🧑🏻 Personalization in Team Building

Another important consideration is personalization. Recognize that not everyone engages in the same way. Some team members might thrive in large group activities, while others might prefer smaller, more intimate interactions. Offering a variety of team building activities can help ensure that everyone's needs and preferences are taken into account.

4. 🎉 The Right Blend of Virtual and In-Person Time Together

In a remote work environment, finding the right balance between virtual and in-person time together is crucial. While virtual events and celebrations play a significant role in fostering a sense of community, in-person interactions are equally important. They provide an opportunity for team members to connect on a personal level, beyond the usual work-related interactions.

Zapier, a remote-first company, hosts regular virtual retreats to celebrate and connect its team members. However, they also understand the value of in-person interactions and organize annual in-person retreats when possible.

💡 READY-TO-USE MATERIALS 💡

▼ 🚀 Try this "Team Agreement" template

Introduction 📄

This team agreement outlines our team's shared understanding of how we will work together in a hybrid environment. It covers our expectations, communication norms, and guidelines for collaboration. This agreement is a living document and can be updated as our team's needs and circumstances change.

Team Members 👥

[List all team members here]

Communication 📢

- Primary Communication Channels: [Specify the primary communication channels your team will use, such as email, Microsoft Teams, etc.]
- Response Time Expectations: [Specify the expected response times for each communication channel.]
- Meeting Norms: [Specify your team's norms for meetings, such as when and how to schedule them, how to prepare, and what to do if someone can't attend.]

Collaboration 🤝

- Collaboration Tools: [Specify the tools your team will use for collaboration, such as SharePoint, OneDrive, etc.]
- Document Collaboration: [Specify your team's norms for document collaboration, such as how to give and receive feedback, how to track changes, etc.]
- Project Management: [Specify the tools and processes your team will use for project management.]

Work Hours and Availability 🕒

- Work Hours: [Specify your team's core work hours, if any.]
- Availability: [Specify how team members should communicate their availability, such as by updating their status in Microsoft Teams or sharing their calendar.]

Work-Life Balance 🧘

- Respecting Boundaries: [Specify your team's norms for respecting boundaries, such as not sending non-urgent messages outside of work hours.]
- Flexibility: [Specify how your team will accommodate flexible work arrangements, if applicable.]

Problem-Solving and Conflict Resolution 🕊️

- Problem-Solving: [Specify your team's approach to problem-solving, such as how to raise and discuss issues.]
- Conflict Resolution: [Specify your team's process for resolving conflicts.]

Continuous Improvement and Feedback ↻

- Feedback: [Specify how and when your team will give and receive feedback.]
- Continuous Improvement: [Specify how your team will identify and implement improvements to your work processes.]

Team Building and Social Interaction 🎉

- Team Building: [Specify how your team will foster a sense of community, such as through regular team building activities or social events.]
- Celebrations: [Specify how your team will celebrate achievements and milestones.]

Agreement Review and Updates

This team agreement will be reviewed and updated on a [quarterly, bi-annual, annual] basis, or as needed. All team members are encouraged to contribute to the review and update process.








Agreement Signatures

By signing below, each team member agrees to uphold the norms and expectations outlined in this team agreement.

[Space for each team member to sign and date the agreement]

6.4.2 What's the proven framework to organize recurring activities

Guide for Organizing Recurring Team Building Activities in a Remote Work Environment

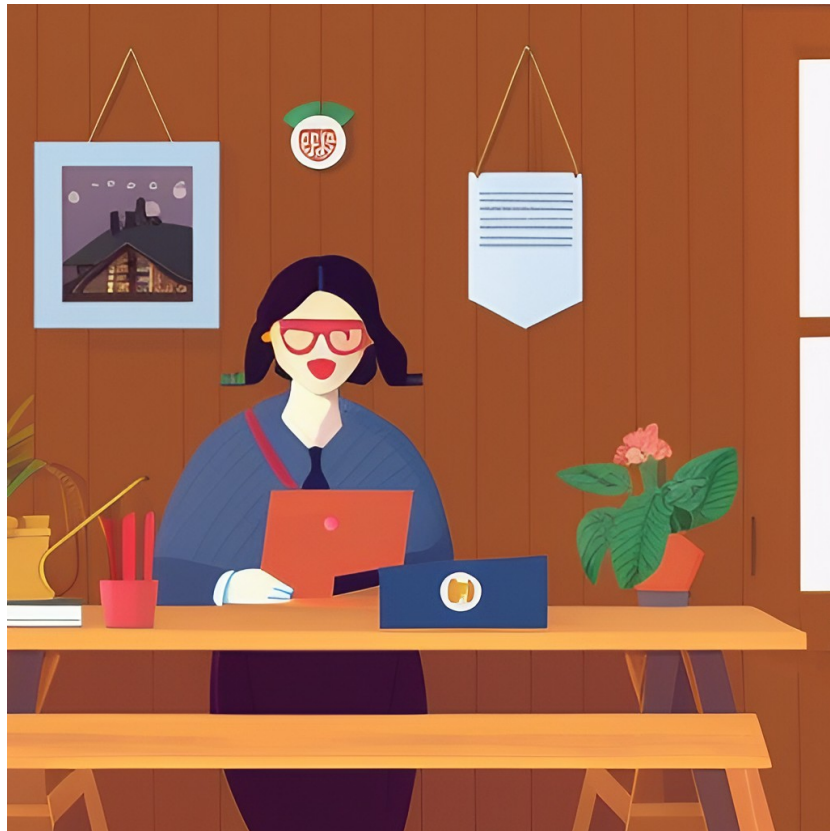
Step	Description	Examples
Define the Purpose 	Start by defining the purpose of the team building activity.	Foster better communication, celebrate a team achievement, strengthen relationships among team members
Consider Your Team's Preferences 	Take into account the preferences and interests of your team members.	Conduct a quick survey to gather input on the types of activities your team members would enjoy.
Plan for Inclusivity 	Ensure that the activity is inclusive and accessible to all team members.	Choose a time that works for all time zones, provide necessary resources or equipment, use a platform that everyone can access easily.
Schedule Regularly 	Make team building a regular part of your team's schedule.	Monthly game night, bi-weekly coffee chat, quarterly virtual retreat.
Communicate Clearly 	Ensure that all team members are aware of the activity well in advance.	Provide clear information about the date, time, platform, and any preparation needed. Send reminders as the date approaches.
Facilitate Effectively 	During the activity, facilitate effectively to ensure that everyone feels included and engaged.	Break larger groups into smaller ones for certain activities, encourage participation, manage time effectively.
Gather Feedback 	After the activity, gather feedback from team members.	Use a feedback form or conduct a debrief session to understand what worked well and what could be improved for future activities.

6.4.3 What are the Top 10 Ideas for Team Building Events?

Activity	Description	Actionable Steps

Hybrid Hackathons 🖥️	Organize a hackathon where team members can collaborate on innovative projects.	1. Define the theme or problem to solve. 2. Set a timeline for the hackathon. 3. Use a collaboration platform for sharing ideas and progress.
Online Workshops or Webinars 🎓	Organize online workshops or webinars on topics of interest to your team.	1. Identify a topic of interest. 2. Find an expert or facilitator. 3. Schedule the session and send invites.
Book Clubs 📖	Start a book club where team members can read and discuss a book together.	1. Choose a book. 2. Set a reading schedule. 3. Organize regular discussion sessions.
Virtual Team Challenges 🏆	Set up virtual team challenges such as trivia quizzes, scavenger hunts, or escape rooms.	1. Choose a challenge. 2. Set a date and time. 3. Use an online platform for the challenge.
Remote Fitness Challenges 🏃	Encourage team members to stay active with remote fitness challenges.	1. Define the fitness challenge. 2. Set a timeline and tracking method. 3. Encourage participation and share progress updates.
Virtual Coffee Breaks ☕	Schedule regular virtual coffee breaks where team members can chat informally about non-work topics.	1. Set a regular schedule. 2. Use a video conferencing tool. 3. Encourage casual conversation.
Virtual Celebrations 🎉	Celebrate team achievements and milestones with virtual celebrations.	1. Identify the achievement or milestone. 2. Plan the celebration activities. 3. Schedule the celebration and send invites.
Hybrid Picnics 🧺	Organize a picnic where team members who are able to meet in person can gather at a local park, while remote team members join via video call.	1. Choose a location and date. 2. Plan for food and activities. 3. Set up a video call for remote team members.
Online Game Nights 🎮	Host an online game night where team members can play online games together.	1. Choose a game that can be played online. 2. Set a date and time. 3. Use a platform that supports online gaming.
Shared Charity Events 🤝	Organize a charity event where team members can contribute to a shared cause.	1. Choose a charity or cause. 2. Plan the event or activity. 3. Encourage participation and track contributions.

7. HOW TO CURATE & SHARE KNOWLEDGE AS A REMOTE TEAM?



TL'DR:

- Outlines five principles for effective knowledge sharing: transparent communication, use of collaborative tools, documentation, learning culture, and trust.
- Highlights the importance of a single source of truth (SSOT) for collaboration, decision making, and efficiency.
- Provides strategies for creating a SSOT, including leading by example, encouraging participation, and maintaining up-to-date documentation.
- Discusses the use of OneDrive and SharePoint for knowledge sharing and collaboration.


7.1 What are the main principles? 🤖

Knowledge sharing in a remote team is crucial for maintaining productivity, fostering innovation, and ensuring all team members are aligned. Here are the five main pillars:

1. 🗨️ **Transparent Communication:** In a remote team, it's essential to maintain open and transparent communication. This includes sharing information freely, providing updates regularly, and ensuring all team members have access to the information they need to perform their roles effectively. It's one of the aspects of building the company's "single source of truth".
2. 🤝 **Collaborative Tools:** Utilize digital tools that facilitate collaboration and knowledge sharing. This could include project management tools, communication platforms, document sharing tools, and knowledge management systems. These tools should be accessible to all team members, regardless of their location.
3. 📄 **Documentation:** Documenting processes, decisions, and learnings is a key aspect of knowledge sharing, and helps establish a single source of truth. This ensures that valuable information is not lost and can be accessed by team members when needed. A culture of documentation also promotes accountability and transparency.
4. 🎓 **Learning Culture:** Foster a culture that values learning and knowledge sharing. Encourage team members to share their expertise, learn from each other, and seek out opportunities for professional development. This could be facilitated through mentorship programs, learning sessions, or online forums for sharing insights and asking questions.
5. 🛡️ **Trust and Psychological Safety:** For effective knowledge sharing, team members need to feel safe to share their ideas, ask questions, and admit when they don't know something. Building trust and psychological safety within the team encourages open communication and the free exchange of knowledge.

Monthly Marketing Update - September, 2019

57 participants · #Doist Lounge

 **Brenna** 10/02/2019 (edited)

Hi everyone 🙌 Hopefully this update finds you all well!

Before we dive into our highlights and plans, I wanted to share a quick recap of our mini retreat Montreal from Sept 10-16. We had a *fantastic* time and definitely encourage other teams to experiment with team retreats 🙌 This year, we focused almost exclusively on Todoist – we put together a list of our discussion topics and a tentative roadmap in [this paper doc](#). You'll see some projects already in the works like the TD email lifecycle revamp ([thread](#)) and the beginnings of an ambassador program ([thread](#)). Right now we're trying to focus on projects that aren't so dependent on the product team, but in the future hopefully we can dive deeper into more product-related growth and marketing initiatives.

Here's a glimpse into what we've been working on in September and what's on tap for October 🍷

Highlights from September:

- **Product marketing:** Released the TDF Beta with an email to web beta users 🙌 (read weekly TDF product marketing updates [here](#)); Worked with our insanely talented designers on the new TD web pages ([channel](#)); Began reviewing all existing TD/TDB lifecycle emails ([thread](#))
- **Business development:** Launched [Twist for Communities](#); Finalized partnerships with [Nomad City](#) and [Industrious](#); Sent Q3 [Twist product market fit survey](#)
- **Growth:** Exploration for an Onboarding 2.0 for Twist (research, use cases, requirements, ideas, etc); Testing Apple Search Ads in German
- **Social/content:** Launched the [Twist Remote Work Guides](#) 🙌; We had 983.7k impressions, 22.2k engagements, 8,949 link clicks, and 1,783 new followers across all social channels.
- Heavy recruiting for the marketing designer role. We're still trying to find Wallace's replacement 🙌... If you know of anyone who could fit the [marketing designer role](#) please share the job description with them 🙌

👤
🔔 97
⋮

- [🔗 Copy link](#)
- [📄 Copy text](#)
- [🗑️ Mark unread](#)
- [➕ Add to 1](#)
- [🔄 Add to Git](#)
- [📧 Add to ...](#)

Source: Twist

7.2 Why do you need a single source of truth (SSOT)? !?

1. **Enhanced Collaboration:** A single source of truth (SSOT) ensures that all team members, regardless of their location, have access to the same information. This promotes collaboration as everyone is working from the same page, reducing misunderstandings and miscommunications.
2. **Improved Decision Making:** With a SSOT, decisions are made based on the same accurate, up-to-date information. This leads to better, more informed decision-making, as all team members have the same understanding of the situation at hand.
3. **Increased Efficiency:** Searching for information across multiple platforms can be time-consuming and inefficient. A SSOT streamlines this process, saving time and improving productivity. Team members know exactly where to go to find the information they need.
4. **Reduced Errors:** When information is scattered across multiple sources, it's easy for inconsistencies and errors to creep in. A SSOT reduces the risk of such errors, as there's only one version of each piece of information.
5. **Greater Transparency:** A SSOT promotes transparency, as all team members have access to the same information. This can help build trust within the team, as everyone can see the same data and understand how decisions are being made.

7.3 How to create & maintain a single source of truth 🏠

- We will use GitLab, one of the world's largest all-remote companies, as a great example of a company that has become a beacon of effective knowledge sharing and documentation in a distributed work context. Their success in creating a culture of transparency, collaboration, and continuous learning is largely attributed to their robust practices in these areas.
- GitLab's approach to knowledge sharing and documentation is not only systematic and comprehensive, but it also emphasizes inclusivity and accessibility. This ensures that every team member, regardless of their location or time zone, has equal access to information and opportunities to contribute.
- Given their proven track record in managing a fully distributed team, GitLab serves as an ideal model for us to learn from as we explore best practices for knowledge sharing and documentation in a remote work environment.
- Here are the practical best practices from GitLab's approach to knowledge sharing and documentation, grouped from the perspective of People Managers

7.3.1 Making Knowledge Sharing Work

1. **Lead by Example:** As a manager, actively participate in knowledge sharing activities. This could be contributing to discussions in team meetings, sharing insights on internal communication channels, or

adding to the company handbook.

2. **Encourage Team Participation:** Foster a culture where every team member feels comfortable sharing their knowledge and insights. Recognize and appreciate contributions to encourage ongoing participation.
3. **Facilitate Regular Team Updates (Sync and Async):** Hold regular team check-ins where knowledge sharing is a key agenda item. This could be sharing updates on projects, discussing new ideas, or sharing learnings from recent work. Can be done both synchronously or asynchronously.
4. **Promote Cross-Functional Collaboration:** Encourage team members to collaborate with colleagues from other departments. This can help to broaden their understanding and perspective, and promote the sharing of diverse knowledge and skills.



7.3.2 How to Make Knowledge Management Work

When it comes to successfully knowledge management in the remote work environment,

1. **Ensure Documentation is Up-to-Date:** Regularly review and update documentation to ensure it remains relevant and accurate. This should be a shared responsibility among all team members.
2. **Use Version Control Systems:** Implement a version control system for documentation. This allows for tracking changes over time, ensuring accountability, and making it easy to revert changes if necessary.
3. **Encourage Collective Ownership:** All team members should be encouraged to contribute to and maintain documentation. This ensures a wide range of perspectives and expertise are included.
4. **Provide Clear Guidelines:** Establish clear guidelines for documentation, including what should be documented, how it should be formatted, and who is responsible for maintaining it.

7.4 How to Leverage OneDrive and SharePoint Integrations

OneDrive and SharePoint are powerful tools that seamlessly integrate with Microsoft Teams, enhancing collaboration and file sharing capabilities. Here's how you can leverage these integrations to boost productivity:

1. **Sharing Files in Conversations** : You can easily share files in a conversation by either uploading them directly or from OneDrive. To do this, simply click on the 'Attach' icon below the text box, select the file you want to share, and hit send. Once shared, everyone in the conversation can view, edit, and collaborate on the file in real-time, fostering a collaborative work environment.
2. **Co-Authoring Documents** : OneDrive and SharePoint integration in Teams allows multiple people to work on a Word, Excel, or PowerPoint file simultaneously. To co-author a document, upload it to a Teams conversation or a channel and click on the file. It will open in Teams, allowing everyone with access to view and edit the document at the same time. All changes are saved automatically and synced to OneDrive or SharePoint, ensuring everyone has access to the most recent version of the document.

3. **Using SharePoint for Team Resources** 🚩: SharePoint is an excellent tool for storing resources that are useful for the entire team. You can create a SharePoint site for your team and store all relevant documents, files, and links there. To make these resources easily accessible, link the SharePoint site to your Teams channel. To do this, click on the '+' icon at the top of your channel, select 'SharePoint,' and choose the site you want to link.

8. HOW TO ENABLE MAX PRODUCTIVITY & A GREAT WORK-LIFE BALANCE CULTURE?



8.1. How Pivotal is the Role of Work-Life Balance in a Remote Work Environment? 🚩



TL'DR:

- Highlights the pivotal role of work-life balance in a remote work environment for employee well-being, job satisfaction, talent retention, and fostering innovation.
- Discusses strategies to manage distractions and stay focused in a remote work environment, including the Pomodoro Technique, time blocking, and setting 'Do Not Disturb' hours.
- Introduces Microsoft Viva Insights as a tool for personal and organizational insights to enhance productivity and work-life balance.
- Explains the use of Microsoft Planner for task management and organization for both individual contributors and people managers.
- Presents the Focus Mode feature in Microsoft Teams as a means to enhance focus during meetings.

In a remote work environment, striking a healthy work-life balance is not just beneficial for employees but also crucial for the overall productivity and success of the organization. Here's why:

1. **Employee Well-being and Health** 🧠: A balanced work-life setup is essential for the mental and physical health of employees. It helps prevent burnout, promotes overall well-being, and allows employees to lead healthier lifestyles. A study by FlexJobs found that 78% of people said having a flexible job would allow them to be healthier (eat better, exercise more, etc.), and 86% said they'd be less stressed.
2. **Job Satisfaction and Loyalty** 📁: Employees who achieve a healthy work-life balance are more likely to be satisfied with their jobs, leading to increased productivity and loyalty. In fact, 80% of respondents in the FlexJobs study said they would be more loyal to their employers if they had flexible work options.
3. **Retention and Talent Attraction** 👥: Companies that promote work-life balance are more likely to retain their employees and attract top talent. The study found that 30% of respondents reported leaving a job because it did not offer flexible work options, and 16% are currently looking for a new job due to flexibility issues.
4. **Innovation and Creativity** 🚀: Employees with a healthy work-life balance are often more creative and innovative. They have the mental space to come up with new ideas and solutions, contributing to the company's growth and success.

In conclusion, fostering work-life balance in a remote work environment is a strategic imperative that drives employee satisfaction, loyalty, health, and productivity. It's not just a nice-to-have, but a vital component of a successful remote work model.

8.2 How to Manage Distractions and Staying Focused in a Remote Work Environment 📡

- In a remote, distractions can come in many forms and can significantly impact productivity. For instance, an office worker might be interrupted by a colleague stopping by for a chat, while a remote worker might be distracted by household chores or family members. On the digital front, constant notifications from emails, messages, and social media can disrupt focus, no matter where you're working.

- Recognizing these challenges, it's crucial to move towards solutions that help manage distractions and enhance focus. The key principles to follow include setting clear boundaries, promoting deep work, and leveraging technology to your advantage.

-  **Pomodoro Technique**

This time management method involves breaking work into intervals, traditionally 25 minutes in length, separated by short breaks. This can help maintain focus and productivity.

-  **Time Blocking**

This involves scheduling specific time slots for different tasks or activities throughout the day. It helps ensure that time is used effectively and that there's a balance between work and breaks.

-  **'Do Not Disturb' Hours**

Use features on your devices to set 'Do Not Disturb' hours. Also, communicate these hours to your colleagues and family members.

8.3 How to use Microsoft Teams to boost productivity?

8.3.1 Viva Insights by MS Teams

In the remote work environment, encouraging quiet time is essential for maintaining focus and productivity. One tool that can facilitate this is Microsoft Viva. As a part of Microsoft 365, Viva is designed to enhance the employee experience by integrating communications, knowledge, learning, resources, and insights into a unified platform. It's accessible through Microsoft Teams and other Microsoft 365 apps that employees use daily.

Personal Insights for Better Work-Life Balance

Microsoft Viva Insights provides personal insights that can help employees better manage their time and maintain a healthy work-life balance. These insights can help employees understand their work patterns and identify areas where adjustments might be needed. For instance, Viva Insights can provide reminders to take regular breaks, suggest focus time for deep work, and even recommend learning opportunities. This can help employees stay productive without feeling overwhelmed.

1. **Regular Breaks:** Viva Insights can provide reminders to take regular breaks throughout the day. This can help prevent burnout and maintain productivity.
2. **Focus Time:** Viva Insights can suggest blocks of focus time for deep work. This can help employees manage their time more effectively and stay focused on their tasks.
3. **Learning Opportunities:** Viva Insights can recommend learning opportunities based on an employee's role and interests. This can help employees continue to grow and develop in their roles.

Organizational Insights for Enhanced Productivity

In addition to personal insights, Microsoft Viva Insights also provides organizational insights. These insights can help leaders understand how work happens in their teams and identify opportunities for improvement. For instance, Viva Insights can provide data on collaboration patterns, work-life balance metrics, and trends in

employee engagement. This can help leaders make informed decisions to enhance productivity and maintain a healthy work-life balance in their teams.

1. **Collaboration Patterns:** Viva Insights can provide data on how employees are collaborating. This can help leaders identify effective collaboration patterns and areas where improvements might be needed.
2. **Work-Life Balance Metrics:** Viva Insights can provide metrics on work-life balance, such as how much time employees are spending in meetings versus focused work. This can help leaders ensure that employees are maintaining a healthy work-life balance.
3. **Employee Engagement Trends:** Viva Insights can provide data on trends in employee engagement. This can help leaders identify areas where engagement is high and areas where additional support might be needed.

In summary, Microsoft Viva can be a valuable tool for encouraging quiet time in a remote work environment. By providing personalized insights, promoting wellbeing, and making knowledge easily accessible, it can help employees stay focused and productive.

8.3.2 How to Utilize The MS Planner?

- Microsoft Planner is an incredibly versatile tool that is integrated within Microsoft Teams, designed to aid teams in organizing their work and ensuring projects stay on track.
- Here are some best practices for managers and individual contributors.

For Individual Contributors

Step	Action	Description
1.	Access Planner 📌	Open Microsoft Teams, navigate to the team and channel where the Planner tab is located.
2.	Understand Your Tasks 📋	Review the tasks assigned to you. They will be visible in the "Assigned to me" section.
3.	Update Task Status ↻	As you work on tasks, keep their status updated. You can mark tasks as in progress, completed, or not started.
4.	Use Labels 🏷️	Use labels to categorize your tasks. This can help you prioritize and organize your work.
5.	Communicate in Tasks 💬	Use the comments section in tasks to ask questions, provide updates, or communicate with your team.
6.	Attach Files 📎	You can attach files to tasks. This is useful for providing additional context or sharing work.
7.	Set Due Dates 📅	Make sure you understand the due dates for your tasks. Plan your work accordingly to meet these deadlines.
8.	Use Notifications 🔔	Planner will send you notifications for upcoming due dates and changes to tasks. Make sure you have these notifications enabled.
9.	Check the Charts 📊	Use the Charts view in Planner to get an overview of the progress of all tasks in the plan.
10.	Use the Schedule 📅	Use the Schedule view in Planner to see tasks in a

calendar view. This can help you understand when tasks are due and plan your work accordingly.

For People Managers

Here's a step-by-step guide for people managers on how to utilize Planner in Microsoft Teams.

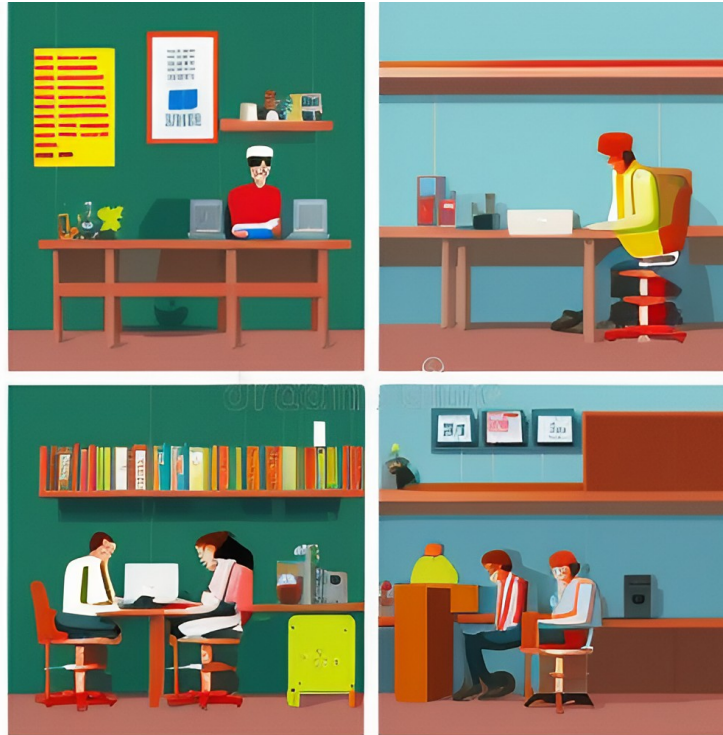
Step	Action	Description
1.	Access Planner 📌	Open Microsoft Teams, navigate to the team and channel where the Planner tab is located.
2.	Create a Plan 📝	Click on the '+' button to add a new tab and select 'Tasks by Planner and To Do'. You can choose to create a new task list or use an existing one.
3.	Add Tasks to the Plan 📋	Once the plan is created, you can start adding tasks. Click on 'Add Task', provide a name for the task, set a due date, and assign it to a team member.
4.	Organize Tasks with Buckets 🗂️	Buckets can be used to categorize tasks. You can create buckets based on phases, types of work, departments, or any other criteria that suits your team's needs.
5.	Monitor Task Progress 🔄	Keep track of the progress of tasks. You can view the status of tasks (not started, in progress, completed) in the 'Board' view.
6.	Communicate within Tasks 💬	Use the comments section in tasks to provide feedback, ask questions, or discuss task-related matters with your team.
7.	Use Planner Features 🛠️	Make use of Planner's features like checklists within tasks, labels for tasks, and attaching files to tasks.
8.	Review Plan Progress 📊	Use the 'Charts' view in Planner to get an overview of the plan's progress. It shows the number of tasks not started, in progress, late, and completed.
9.	Schedule View 📅	Use the 'Schedule' view in Planner to see tasks in a calendar view. This can help you understand when tasks are due and plan your work accordingly.
10.	Notifications 🔔	Planner will send you notifications for upcoming due dates and changes to tasks. Make sure you have these notifications enabled.

8.3.3 Focus mode by MS Teams

- In the remote work environment, maintaining focus during meetings can be a challenge due to various distractions. Microsoft Teams has introduced a feature called "Focus Mode" to help you stay concentrated on the task at hand. This feature simplifies your screen layout during meetings, allowing you to direct your attention solely to the content being shared.

- This section will guide you on how to effectively use Focus Mode in Microsoft Teams to enhance your productivity and make your meetings more efficient.
1. **When to Use Focus Mode** - This feature is particularly beneficial when you're presenting or actively participating in a meeting and need to stay focused. It also subtly communicates to your colleagues that you're engaged in a task, discouraging potential interruptions.
 2. **The Advantages of Focus Mode** - By using Focus Mode, you can effectively avoid distractions such as participant videos or in-meeting chats. When used in conjunction with the fullscreen option, it also hides notification badges in the taskbar, further reducing potential distractions.
 3. **Activating Focus Mode** - To enable Focus Mode, simply click the 'View' icon at the top of your screen during a meeting and select 'Focus on content'. For an even more immersive experience, select the 'Full screen' option under 'Views'.
 4. **Deactivating Focus Mode** - To turn off Focus Mode, click the 'View' icon, select 'Full screen', then click 'View' again and deselect 'Focus on content'.
 5. **Synchronizing Presence Across Platforms** - If you're using Teams but your colleagues are on other platforms like Slack or Webex, they won't be able to see your status. Presence Sync is a tool that automatically updates your presence status across different platforms. So, if you're in a Teams meeting with Focus Mode activated, your status will be updated on all connected platforms.
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9. HOW TO EFFECTIVELY UPSKILL IN A REMOTE ENVIROMENT?



TL'DR:







- Highlights the importance of upskilling in a remote work environment for both individual contributors and people leaders.
- Discusses impactful training initiatives such as cohort-based learning, workshops and webinars, self-paced learning, mentoring circles, involvement of practitioners, and regular measurement of results.
- Provides best practices for implementing these initiatives, including involving practitioners, clear scheduling, ensuring equal participation, and promoting continuous learning and measurement.

9.1 Why is up-skilling so crucial right now 🐱

- People Leaders lack skills to fully mentor their teams outside of the office space. New skills and processes are needed are also needed for individual contributors.
- There are various ways how we will be addressing these challenges moving forward.
 - up-skilling paths for individual contributors
 - comprehensive management training program
 - ongoing mentoring support

- company-wide knowledge base
- You should continue to promote a culture of continuous learning and knowledge sharing. Especially now as the remote work model requires that all team members have access to the resources and support they need to thrive.
- This includes providing comprehensive training and development opportunities that are tailored to the unique challenges and opportunities of remote work.

9.2 What are the Training Initiatives With The Most Impact

Training Initiatives	Description	Examples
Cohort-Based Learning 	This approach combines various learning methods over a set period, such as 8 weeks.	* Week 1: Kick-off call to set expectations and goals * Week 2-7: Combination of workshops, self-paced certification program, and mentoring circles * Week 8: Graduation call to celebrate achievements and discuss next steps
Workshops and Webinars 	Organize interactive sessions where team members can learn and apply new skills.	Workshops: Hands-on sessions where team members can brainstorm specific challenges and build solutions together. This could be done synchronously during live sessions, or asynchronously between sessions using collaborative tools. Webinars: Live, online presentations where an expert shares knowledge on a specific topic. They are typically more lecture-style and less interactive than workshops.
Self-Paced Learning 	Provide access to online courses or certification programs that team members can complete at their own pace.	This could cover a range of topics relevant to remote work, from communication and collaboration tools to strategies for maintaining work-life balance. Materials for self-paced learning could include instructional videos, reading materials, interactive quizzes, and practical checklists for implementing learned strategies.
Mentoring Circles 	Facilitate small group sessions where team members can share experiences, discuss challenges, and learn from each other. These could be organized by role or function to ensure relevant discussions.	A mentoring circle could be set up for project managers, where they can discuss specific challenges related to managing remote teams. Another circle could be for new hires, where they can share their experiences and learn from more seasoned remote workers.
Involvement of Practitioners 	Involve experts in the field to run training sessions. This could be internal experts or external consultants.	Personas that would work for this include experienced remote workers, HR professionals with a focus on remote work, and leaders who have successfully managed remote teams.
Regular Measurement of Results 	Regularly measure the results of the training initiatives to ensure they are effective and to identify areas for improvement.	This could be done through surveys like Remote Work Score, feedback sessions after training initiatives, and tracking key performance indicators (KPIs) related to remote work.

9.3 Best Practices for Implementation

9.3.1 Involvement of Practitioners

Involve experts in the field who have practical experience in managing remote teams. These could be internal leaders who have successfully navigated the transition to remote work, or external experts who can bring fresh perspectives.

9.3.2 Clear Scheduling

Ensure that all team members are aware of the schedule for live sessions and mentoring circles well in advance. This helps everyone plan their time effectively and ensures maximum participation.

9.3.3 Equal Participation

Make sure that all team members, whether they're working remotely or in the office, have equal opportunities to participate in learning sessions and integration meetings. This helps to build a culture of inclusivity and ensures that everyone can benefit from these opportunities.

9.3.4 Continuous Learning and Measurement

Encourage a culture of continuous learning by providing ongoing access to resources and learning opportunities. This could include regular updates to courses, access to an online community for peer support, and opportunities for further development. Regularly measure the results of your training program, for example, through surveys, to understand its impact and make necessary improvements.

- Discuss the importance of effective onboarding in a remote work environment.
- Explore different training programs suitable for employees and leaders in a remote work environment.
- Discuss the role of management training in leading remote teams.
- Discuss the importance of training on asynchronous communication best practices.
- Explore case studies of successful remote onboarding and training.

1. Develop New Mentoring and Coaching Models: To ensure that remote workers have access to the same opportunities for informal coaching and mentorship as their in-person colleagues, organizations must develop new approaches. This could involve rethinking the onboarding process, which is an important means for building connections and fostering a healthier workplace culture.

2. Addressing the Impact on Younger Employees: The article mentions that younger employees, particularly Gen Z and millennials, often struggle with remote work settings due to a perceived lack of mentorship, coaching,

and socialization. This is an important consideration for the playbook, and strategies could be developed to specifically support younger employees in a remote work environment.

10. HOW TO ONBOARD REMOTE EMPLOYEES?



TL'DR:

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10.1 Onboarding challenges overview

Based on the current onboarding process and the best practices for remote work onboarding, here is a comparison table:

Current Process	Action to be Taken	Ideal Scenario
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1. Initial communication is done via email	Introduce Async-Video Welcome Message To Build More Personal Connection	Initial communication should be done via a video call to establish a personal connection
2. New hires are given access to tools for communication, project management, and documentation.	Provide Comprehensive Collaboration Training	New hires should be given access to tools, but also provided with comprehensive training on how to collaborate in the team and use them effectively. List of tools -
3. New hires are expected to read and understand the company policies and procedures on their own	Async Q&A Policy Explanation	Company policies and procedures should be explained in an async Q&A session, with opportunities for new hires to ask questions.
4. New hires are assigned a buddy for the first week	Extend Buddy Period	New hires should be assigned a mentor for a longer period, not just the first week, but with a clear mentorship plan and milestones that are subject for review.
5. New hires are expected to learn about the company culture through observation	Explicit Culture Communication	Company culture should be explicitly communicated and demonstrated through team activities and leadership behavior
6. Onboarding is considered complete after the first week	Extend Onboarding Process	Onboarding should be an ongoing process, with regular check-ins and feedback sessions for at least the first few months.
8. Training is done through pre-recorded videos and documents.	Interactive Training Sessions	Introduce mini-training into onboarding sessions that is interactive, with live sessions and opportunities for discussion and questions.
9. Communication is primarily done through email and chat	Diversify Communication Channels	Communication should be done through a variety of channels, including video calls, to foster better connections.
10. New hires are expected to manage their own work-life balance	Introduce Work-Life Balance Guidelines	The company should actively promote and support work-life balance, especially in a remote work environment

Please note that the ideal scenario is based on best practices and may need to be adapted to suit the specific needs and circumstances of your company.

10.2 Onboarding checklist

▼ New Hire Onboarding [TEMPLATE]

You can personalize this template however you want.

 [New Hire Onboarding_\(dummy_data\)](#)

11. HOW TO KEEP US SECURE AND COMPLIANT?



 TL'DR:

- ...

12. HOW TO IMPROVE AND UPDATE THIS POLICY?

 TL'DR:

- ...

12.1 Process

1. **Policy Review Initiation:** Set a regular schedule for policy review, such as every six months or annually. This review should be initiated by the HR department or a designated policy review team.
2. **Gather Feedback:** Collect feedback from employees about the current remote work policy. This can be done through surveys, focus groups, or one-on-one interviews.
3. **Review Feedback and Current Policy:** Analyze the feedback received and review the current policy in light of this feedback. Look for areas that are working well and areas that need improvement.
4. **Draft Policy Updates:** Based on the feedback and review, draft any necessary updates to the policy.
5. **Review Draft Updates:** Have the draft updates reviewed by key stakeholders, such as HR, legal, and management.
6. **Finalize and Implement Policy Updates:** Once the updates have been reviewed and approved, finalize the updated policy. Communicate the updates to all employees and implement any necessary changes in practice.
7. **Monitor and Adjust:** After the updated policy is implemented, monitor its effectiveness and make any necessary adjustments. This should be an ongoing process.

12.2 Checklist

- Set schedule for regular policy review
 - Collect feedback from employees about current policy
 - Analyze feedback and review current policy
 - Draft necessary policy updates
 - Have draft updates reviewed by key stakeholders
 - Finalize and communicate policy updates
 - Implement policy updates in practice
 - Monitor effectiveness of updated policy
 - Make necessary adjustments to policy as needed
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ADDITIONAL SOURCES

- <https://remote-how.com/resources>
- <https://remote-how.com/blog>

- <https://remote-first.institute/blog>