

Facilitator Guide

Remote Leadership Skills

**Fictional Company
Logo Here**



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Overview

Course Title: Remote Leadership Skills

Background: The (fictional) company specializes in tailor-made sales solutions for their clients. Sales teams composed of 10-15 people report to a manager, who leads that team to generate business. In a similar fashion, these team managers report to upper management. Recently, the company transitioned to a remote workplace.

Problem: With the company adjusting to a new work environment, concerns were raised about employee engagement and productivity while working from home. The company saw a need for training as their managers adjusted to leading teams virtually.

Business Goal: With the recent shift in our work environment, the goal of this training is to equip sales managers with some basic skills for leading their teams virtually. When put in action, these skills will help engage employees and keep productivity high while working from home.

Training Objectives:

- Discuss why remote leadership skills are important
- Identify and provide examples of 3 skills:
 - Performance Management
 - Communication
 - Team-Building
- Practice these skills in scenario activities
- Reflect on our own performance as remote leaders

Format: This is a 90-minute Virtual Instructor-Led Training

Delivery: There will be notes provided from which to speak from. However, there are times for open discussion. Feel free to add your own personality to these discussions while staying on brand with the messaging.

Materials:

- You will need a stable internet connection with a camera and microphone
- Remote Leadership Skills slide deck
- Remote Leadership Skills: Facilitator Guide
- Remote Leadership Skills: Participant Guide

Lesson 1

The Importance of Remote Leadership Skills

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Learning Objective(s):

Learners will discuss why remote leadership skills are important based on their personal experience and industry trends.

Time: 10 minutes

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Slide #3



Facilitator Notes



Ask: Why are remote leadership skills important?



Direct them to the Participant Guide where they can record their ideas.



Discuss: Allow time for participants to unmute and respond. You can also read any responses aloud that were entered into the chat.

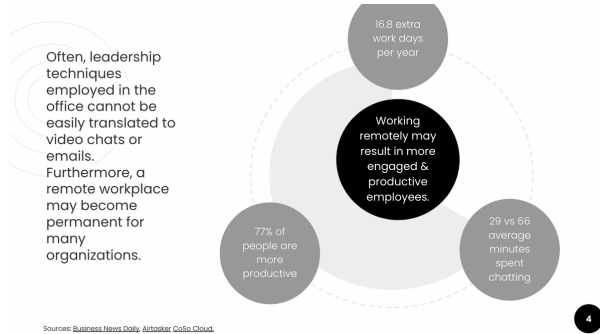


Ask: If there is a lull in conversation, ask this follow-up question - Do you think working remotely is effective? Why or why not?

Lesson 1 Continued

Slide #4

Facilitator Notes



Read: Often, leadership techniques employed in the office cannot be easily translated to video chats or emails. Furthermore, a remote workplace may become permanent for many organizations. Let's look at some data.



Direct participants to fill in the corresponding notes on their Participant Guides.



Read: Studies from Business News Daily, Airtasker, and SoCo Cloud have shown that working remotely may result in more engaged and productive employees. 77% of those surveyed said they are more productive when working at home. This is further illustrated by companies reporting that their remote employees work 16.8 extra days per year than their office-going counterparts. Another interesting statistic is that only 29 average minutes were spent chatting amongst co workers - versus the 66 average in the office.



Ask / Discuss: If time allows, open up to comments. You could ask "Do these statistics seem accurate based on your experience?"

Lesson 1 Continued

Slide #5

Facilitator Notes



Before you are a leader, success is all about growing yourself. When you become a leader, success is all about growing others.

-Jack Welch

5



Read: This quote by Jack Welch is something to keep in mind during today's training. (Read quote.) How can we continue to engage our employees and foster growth in this new virtual environment? Let's talk about 3 vital remote leadership skills to do just that.

Lesson 2

Performance Management

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Learning Objective(s):

Learners will identify and provide examples for 5 remote performance management strategies by taking notes and participating in group discussions.

Learners will practice this skill in a scenario activity.

Time: 20 minutes

.....

Slide #6



Facilitator Notes



Read: Let's take a look at strategies you can use to make sure your team is reaching (or exceeding!) goals.

Lesson 2 Continued

Slide #7

Facilitator Notes



- 1 Remote Expectations
- 2 Key Performance Indicators
- 3 Using Data
- 4 Feedback
- 5 Recognition



On mouse click: Display "Remote Expectations"



Read: You need to set and communicate clear expectations that are specific to the remote workplace. Consider the expectations you had in the office. Can these be adjusted or are they even necessary? Do you need new expectations? After establishing your expectations, communicate these to your team, remain consistent, and hold people accountable.



Read: Consider these examples of remote expectations

- a. Will you adhere to a specific dress code?
- b. How will employees log their hours or request time off?
- c. Will you require everyone to use their cameras during virtual meetings?



Tell participants to use their guides to jot down any other example expectations.



Discuss: If time allows, you can ask them to share & discuss.

Lesson 2 Continued

Slide #7

Facilitator Notes



- 1 Remote Expectations
- 2 Key Performance Indicators
- 3 Using Data
- 4 Feedback
- 5 Recognition



On mouse click: Display "Key Performance Indicators"



Read: Companies and their leaders must establish Key Performance Indicators (KPIs) that are specifically related to output and work product. Your organization likely already has KPIs in place; however, they need to be re-examined to fit the needs of a remote workforce. Rather than time logged in the office or other physical factors, KPIs need to be focused on what your employees are actually accomplishing.



Tell participants to use their guides to jot down any other example expectations.



Discuss: If time allows, you can ask them to share & discuss.

Lesson 2 Continued

Slide #7

Facilitator Notes



- 1 Remote Expectations
- 2 Key Performance Indicators
- 3 Using Data
- 4 Feedback
- 5 Recognition



On mouse click: Display "Using Data"



Read: Once your team understands how individuals (and the organization) will be assessed through KPIs, it is important for managers to track how their team performs. On an individual and team level, you would use this data to guide employees. What are they doing well and what needs improvement? It is important to use this data to make decisions because it may change as employees adjust to the remote workplace. Something the team excelled at in office may now need to be an area of focus. Managers must continually analyze their teams' data and use it as a guiding force in their leadership.

Lesson 2 Continued

Slide #7

Facilitator Notes



- 1 Remote Expectations
- 2 Key Performance Indicators
- 3 Using Data
- 4 Feedback
- 5 Recognition



On mouse click: Display "Feedback"



Read: You need to provide consistent and quality feedback. This connects back to your KPIs and using data: employees need to know how they are performing on a regular basis. In addition, you should use your data to give them specific notes on their work; simple comments such as "this is good/bad" are not very helpful. Why is it good or bad and what action steps do they need to take?

Lesson 2 Continued

Slide #7

Facilitator Notes



- 1 Remote Expectations
- 2 Key Performance Indicators
- 3 Using Data
- 4 Feedback
- 5 Recognition



On mouse click: Display "Recognition"



Read: Leaders must continue to provide incentives and celebrate achievements. However, it is not as simple as it was in the office. What can the company provide that would stay within their remote policies?



Tell participants to use their guides to jot down ideas.



Discuss: If time allows, ask them to share & discuss. After any discussion, share these examples -

- a. Gift cards
- b. Delivered gift boxes
- c. Time off



Read: Finally, don't forget to celebrate achievements on your team - big or small! You can spotlight employees through emails, virtual meetings, or newsletters.

Lesson 2 Continued

Slide #8

Facilitator Notes



An employee has not been meeting their call metrics since transitioning to the remote workplace.

8



Read: Consider this scenario (read aloud). How would you handle this situation?



Direct participants to brainstorm ideas in their guide.

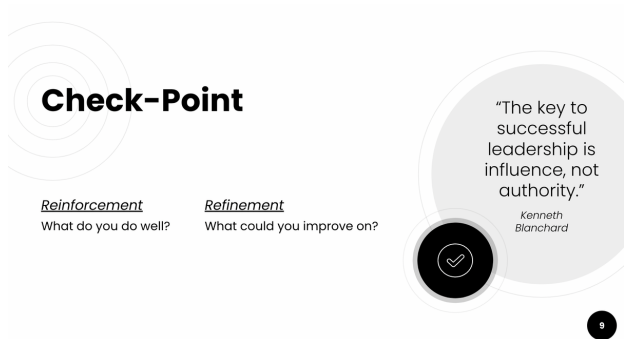


Discuss: Take a few minutes to hear responses, then describe this good course of action: Ask the employee questions and provide specific feedback on how they can get back on track. Continue to check on them consistently.

Lesson 2 Continued

Slide #9

Facilitator Notes



Check-Point

Reinforcement
What do you do well?

Refinement
What could you improve on?

"The key to successful leadership is influence, not authority."
Kenneth Blanchard

9



Explain the difference between Reinforcement and Refinement. Ask participants to reflect on their performance management skills in their Participant Guides based on the topics discussed.

Lesson 3

Communication

Learning Objective(s):

Learners will identify and provide examples for 5 remote communication strategies by taking notes and participating in group discussions.

Learners will practice this skill in a scenario activity.

Time: 20 minutes

Slide #10



Facilitator Notes



Read: Let's examine five ways to boost remote communication and keep your team engaged!

Lesson 3 Continued

Slide #11

Facilitator Notes

1. Check-Ins 2. Consistency

3. Team Connection 4. Identify & Address Problems 5. Listen

11



On mouse click: Display "Check-Ins"



Read: You must establish regular, frequent check-ins with your team and individuals within a set tool or channel. These weekly or biweekly meetings serve not only to keep you updated on your employees' work, but they also provide time to build relationships with your team members.

Lesson 3 Continued

Slide #11

Facilitator Notes



1. Check-Ins 2. Consistency

3. Team Connection 4. Identify & Address Problems 5. Listen

11



On mouse click: Display "Consistency"



Read: Effective leaders should always be consistent with meetings as it provides a sense of security and stability. Team and individual meetings should occur at the same time and "place," just like they should in the physical office. If scheduling conflicts should arise, share your schedule and make time to communicate with everyone.

Lesson 3 Continued

Slide #11

Facilitator Notes



1. Check-Ins 2. Consistency

3. Team Connection

4. Identify & Address Problems

5. Listen



11



On mouse click: Display "Team Connection"



Read: You need to set up ways for team members to not only connect with you, but with each other.



Ask / Discuss: Consider this from your perspective: Do you communicate regularly with your fellow managers? Why is this important for you?

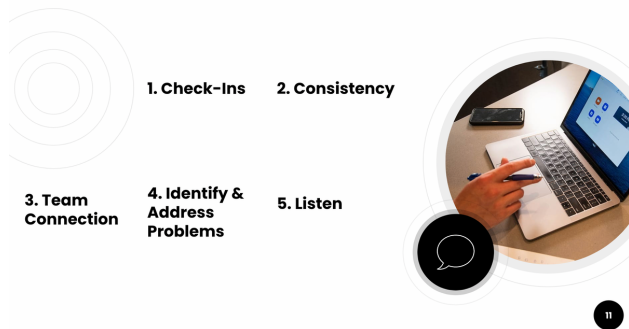


Read: Peer communication and feedback is sometimes more well-received and insightful than leadership critiques. In addition, peers may be able to answer questions before they come directly to you. And finally, no one wants to feel alone when they are doing a job; having a support system that understands your position is necessary.

Lesson 3 Continued

Slide #11

Facilitator Notes



1. Check-Ins 2. Consistency

3. Team Connection 4. Identify & Address Problems 5. Listen

11



On mouse click: Display "Identify & Address Problems"



Read: If communication breakdowns do occur, identify and address them as soon as possible. If your team is not communicating with you or each other, you are missing a vital component of your workforce. Ask your team for feedback and make adjustments to suit everyone's needs in the best way possible.

Lesson 3 Continued

Slide #11

Facilitator Notes



3. Team Connection

1. Check-Ins

2. Consistency

4. Identify & Address Problems

5. Listen



11



On mouse click: Display "Listen"



Read: The most fundamental aspect of communication is to be an engaged listener and empathize with others. While you do need to lead your team and offer guidance, you should not just lecture over the screen. How your employees' feel directly relates to their engagement and productivity. You do not always need to have a reply or a solution available, but let them know you hear them and remember what they say.

Lesson 3 Continued

Slide #12

Facilitator Notes



Scenario



You've had something come up during your regularly scheduled team meeting.

12



Read: Consider this scenario (read aloud). How would you handle this situation?



Direct participants to brainstorm ideas in their guide.



Discuss: Take a few minutes to hear responses, then describe this good course of action: Consult schedules and availability of your team in order to reschedule the meeting for the best possible day and time.

Lesson 3 Continued

Slide #12

Facilitator Notes



Check-Point

Reinforcement

What do you do well?

Refinement

What could you improve on?



"The single biggest problem in communication is the illusion that it has taken place."

George Bernard Shaw



Remind participants of the difference between Reinforcement and Refinement. Ask participants to reflect on their communication skills in their Participant Guides based on the topics discussed.

Lesson 4

Team - Building

Learning Objective(s):

Learners will identify and provide examples for 5 remote team-building strategies by taking notes and participating in group discussions.

Learners will practice this skill in a scenario activity.

Time: 20 minutes

Slide #14



Facilitator Notes



Read: Managers must get creative when establishing a remote team culture; let's look at five ways you can build a strong team virtually!

Lesson 4 Continued

Slide #15

Facilitator Notes



1. Informality
2. Special Events
3. Traditions
4. Empathy
5. Optimism



15



On mouse click: Display "Informality"



Read: As a leader, you need to show your employees that you're human. To do this, include time for informality. Working from home will inevitably include pets jumping into view, babies crying, or any number of things that would be unheard of in the office. Instead of ignoring or correcting, use these moments as time to bond and get to know your team better.

Lesson 4 Continued

Slide #15

Facilitator Notes



1. Informality
2. Special Events
3. Traditions
4. Empathy
5. Optimism



15



On mouse click: Display "Special Events"



Read: Another way to establish your team culture is through hosting bi-weekly or monthly special events. While meeting in person may be impossible, there are many ways to connect remotely.



Ask: What are some ideas you all have - or perhaps done - as a special event for your team?



Discuss: Acknowledge their responses and then give these examples:

- o Jack Box Games
- o "Happy Hours"
- o Trivia or Contests
- o Escape Games
- o Wine Tastings
- o Painting Parties



Read: You could consider having local businesses (such as trivia organizations, wineries, etc.) lead these events on Zoom or other channels. Companies could deliver items ahead of time (such as painting supplies or wine samples) and the team would be ready to participate from the comfort of their own homes. Taking a little time to brainstorm and prepare could lead to some awesome team events!

Lesson 4 Continued

Slide #15

Facilitator Notes



1. Informality
2. Special Events
3. Traditions
4. Empathy
5. Optimism



15



On mouse click: Display "Traditions"



Read: Creating traditions is another way to build your team culture. This echoes back to the idea that consistency equates to consistency and stability. Traditions will also give your team time to bond.



Ask: Do you have any traditions with your team?



Discuss: Acknowledge their responses then give these examples:

- Start or end meetings with a fun question.
- Have "theme" days where people can change their background or dress up.
- Send positive newsletters or emails to start the week.

Lesson 4 Continued

Slide #15

Facilitator Notes



1. Informality
2. Special Events
3. Traditions
4. Empathy
5. Optimism



15



On mouse click: Display "Empathy"



Read: Whether in person or remote, great leaders practice empathy. Your team needs to know they have a boss that cares about them and their ideas. If you continually do this, your team will be more confident in sharing creative ideas and solutions. If individuals become stronger problem-solvers, your team and company will also become stronger. This type of collaboration will only occur if they know their leader is open-minded and supportive.

Lesson 4 Continued

Slide #15

Facilitator Notes



1. Informality
2. Special Events
3. Traditions
4. Empathy
5. Optimism



15



On mouse click: Display "Optimism"



Read: Working remotely often presents new challenges and stressors. In order to make your team feel more confident, you need to project optimism. If your team feels more confident, they will be better able to focus. If your team is scattered and anxious, "it is our job to share our calm, not join in their chaos." (L.R. Knost)

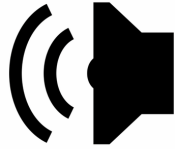
Lesson 4 Continued

Slide #16

Facilitator Notes



Scenario



You are leading a (virtual) team meeting when you hear a baby crying.

16



Read: Consider this scenario (read aloud). How would you handle this situation?



Direct participants to brainstorm ideas in their guide.

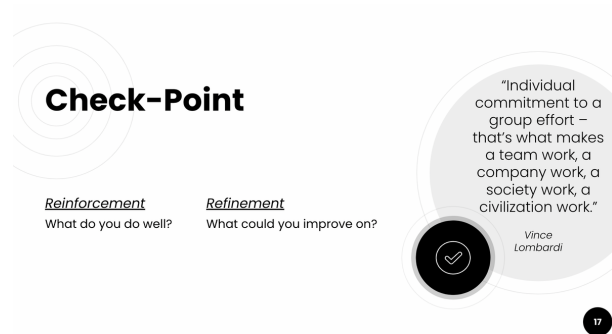


Discuss: Take a few minutes to hear responses, then describe this good course of action: Find out who it is, ease their anxiety, and maybe even ask a polite question about the baby.

Lesson 4 Continued

Slide #17

Facilitator Notes



Check-Point

Reinforcement
What do you do well?

Refinement
What could you improve on?

"Individual commitment to a group effort – that's what makes a team work, a company work, a society work, a civilization work."
Vince Lombardi

17



Remind participants of the difference between Reinforcement and Refinement. Ask participants to reflect on their communication skills in their Participant Guides based on the topics discussed.

Lesson 5

Team - Building

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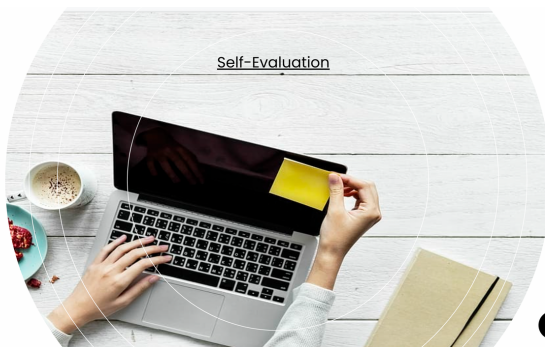
Learning Objective(s):

Given a set of questions, remote managers will reflect on their performance of their remote leadership skills.

Time: 10 minutes

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Slide #18



Facilitator Notes



Read: The best leaders always strive to improve their performance! Please take a moment to complete the anonymous self-evaluation in your Participant Guide. Use this data to guide areas of reinforcement and refinement and apply your findings as soon as you can!



Ask participants to complete the surveys located in their Participant Guides. Allow them to type questions in the chat, but have this be a quiet moment of self reflection. You could even play some calm background music and display a timer.



Debrief: When time is up, answer any lingering questions, and then review the objectives and what was covered before ending the training.

Appendix

Pre Course Support

Keep the following tips in mind when conducting any adult training. You may wish to review these tips and incorporate them into your session planning.

1. People learn when they feel they need to.

Illustrate ways your training will help participants improve job performance by tying the concepts learned back to their jobs.

2. People learn by doing.

Use the activity prompts given in this guide, or feel free to create your own. Make sure to include the Participant Guide for your participants to use and take back to their jobs for continued and reinforced learning.

3. People learn by solving realistic problems.

Discuss and analyze actual on-the-job situations. Allow the trainees to solve these real-life problems by using what they have learned. This is why scenarios are included in almost every lesson.

4. People learn in an informal environment.

Design your training room to be as informal as possible. Encourage discussion and interaction to make participants feel more comfortable; this is especially important to set the tone in a virtual classroom where discussions can be more difficult. Ensure participants know they can use the chat when verbal questions or comments may be inappropriate, and you can get to their input when the training allows.

5. People learn by different training methods.

Vary your training methods. This guide includes suggestions for discussions, scenarios, self-evaluations, and action planning. Using a variety of methods reinforces your message and promotes audience involvement.

Appendix

Course Delivery Support

There are several activities one can perform in a virtual class setting to facilitate knowledge retention. In this guide, you will find suggestions on how to engage with participants. Look for these prompts:

Read: This is a pre-written script; as the facilitator gets more comfortable with the content, they are encouraged to tailor this to their presentation style while maintaining the messaging.

Ask or Discuss: This is to interact with the class by eliciting verbal or text responses.

Scenario: This activity asks participants to apply the knowledge to an event they count encounter in the workplace. Discussions after scenarios are encouraged if time permits.

It is recommended to interact early with the audience to get a better understanding of the participants. To maximize effectiveness, presentation of the content should be tailored to the both the audience and the facilitator as he or she gains experience delivering the training.

Post Course Support

Facilitators/trainers can learn by implementing follow-up methods.

Follow-up methods are crucial when determining the success of transferred training. Feedback from your participants' manager; follow-up surveys or training sessions; three-, six-, and nine month skill-testing sessions; etc., can help you evaluate the information being used on the job site. It can also help participants retain the information that was presented.