Working Together But Apart - An Introduction to Virtual Meetings & Managing Remote Teams

Northern California CoP

6/3/20
Feature Presentation
Meeting Agenda

Today’s Presentation
Working Together But Apart
An Introduction to Virtual Meetings & Managing Remote Teams

• 3:30 – 3:40 – Virtual Mixer
• 3:40 – 4:40 – Feature Presentation
• 4:40 – 4:50 – Questions and Answers
• 4:50 – 5:00 – Closing Remarks, Plus/Delta
Thank you, essential workers.
Be safe, everyone.
Thanks for spending this time with us!
How many virtual meetings do you attend on average per day?
Learning Objectives for Today

- **PREPARE & LEAD**: How to prepare for and lead a virtual meeting
- **PARTICIPATE**: How to participate effectively
- **WORKPLACE MANAGEMENT**: How to improve remote workplace management
Our new normal...for now.
Presentations are not the same as virtual meetings. The purpose is different.

**Presentations**
- May be one-way communication
- Those who need to receive information

**Virtual Meetings**
- Interactive
- Those who need to contribute to decision-making and share information
Virtual meeting: Prepare for the meeting
Communicate purpose ahead of time:

“We are meeting because...”

“The purpose of this meeting is....”

“This is important because...”

“By the end of this meeting, I hope we will...”
Virtual meeting: Prepare for the meeting

Agenda
Virtual meeting: Prepare for the meeting

- Reading Materials
Virtual meeting: Prepare for the meeting

- Who to Invite
Virtual meeting:
Prepare for the meeting
Virtual meeting: Prepare for the meeting

Establish Roles
What are some challenges that you’ve encountered when facilitating a virtual meeting?
Common challenges

People dominating the conversation

Too many people in the meeting

Muting / not muting
Virtual meeting: Facilitate the meeting

- Rules
- Time Management
- Reflections
- Water Cooler
- Optimism
Rules of Engagement Example:

- Active listening
- Step up, step back
- Try something new
- Be safe, think safe
- Speak your truth
- Ask “why?”
- Recognize when to move on
- Welcome Dissent
Virtual meeting: Facilitate the meeting

- Rules
- Optimism
- Time Management
- Water Cooler
- Reflections
Reflect at end of meeting

- Meeting purpose met
- No multi-tasking
- Everyone engaged
- Disagreements made visible
- Action items and follow-up clear
- Improvement idea for next meeting
Virtual meeting:
Participate in the meeting

- Reduce Distractions
- Rules
- No Mute
- Use the Technology
- Ask for Feedback
Video-conferencing fosters higher engagement and interactions
Seek explicit feedback

“Does what I just said make sense?”

“Do you agree?”

“Does anyone disagree?”

“Does anyone have any questions about what I just shared?”

“What comments do you have?”

“What do you have?”
Managing the work when remote
What are you struggling with in getting the work done?
Some common challenges with remote work

- Working *long* hours
- Let me focus on the work I know or want to do
- Stop micro-managing me!
- Stop the interruptions!
- Why isn’t anyone responding to me?
- So, *who* makes these decisions now?
- What is the expectation?
- Isolation....
Keys to Remote Work Management

- Provide structure
- Communicate
- Build skills
- Lead differently
- Leverage technology
Establishing a clear structure support clear roles, ownership, and accountability

Manage Demand and Capacity

Establish structure for information flow

Develop routines
The remote team should anticipate and manage the incoming work

<table>
<thead>
<tr>
<th>Why do this?</th>
<th>Key steps</th>
<th>Tips</th>
</tr>
</thead>
<tbody>
<tr>
<td>▪ To help balance workload</td>
<td>▪ Decide on planning horizon – daily, weekly</td>
<td>▪ Pace the check-ins to match how the work needs to be adjusted</td>
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<tr>
<td>▪ To meet customer demand</td>
<td>▪ Understand capacity and availability</td>
<td>▪ Don’t spread the work – one person free for a day is better than 8 free for an hour</td>
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<tr>
<td>▪ Plan for the future</td>
<td>▪ Use visual management</td>
<td>▪ Establish flex resources where possible</td>
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<td>▪ Focus on agreed upon priorities</td>
<td>▪ Triage and assign new work</td>
<td>▪ Level the work - Ensure the work actually needs to get done at the target time</td>
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<td>▪ Set trigger points for OT and new resource draws</td>
<td>▪ Change hours worked</td>
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Why do this?

- To help balance workload
- To meet customer demand
- Plan for the future
- Focus on agreed upon priorities

Key steps

- Decide on planning horizon – daily, weekly
- Understand capacity and availability
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Tips

- Pace the check-ins to match how the work needs to be adjusted
- Don’t spread the work – one person free for a day is better than 8 free for an hour
- Establish flex resources where possible
- Level the work - Ensure the work actually needs to get done at the target time
- Change hours worked
Establish structure for effective communications and decision making

<table>
<thead>
<tr>
<th>Team</th>
<th>Daily</th>
<th>Weekly</th>
<th>Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Start of Day</td>
<td>Daily Review</td>
<td>Monthly review</td>
</tr>
<tr>
<td>Team board</td>
<td>Team board</td>
<td>Weekly review</td>
<td>Monthly scorecard</td>
</tr>
</tbody>
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<table>
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<tr>
<th>Team leaders</th>
<th>Daily</th>
<th>Weekly</th>
<th>Monthly</th>
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<tr>
<td>Daily Review</td>
<td>Team board</td>
<td>Weekly review</td>
<td>Monthly review</td>
</tr>
<tr>
<td>Issue recognition by next tier</td>
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<tr>
<th>Managers</th>
<th>Daily</th>
<th>Weekly</th>
<th>Monthly</th>
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- Pull the work in to weekly deliverables
- Collaborate in small teams
- Daily identification of constraints
- Frequent interaction – establish a rhythm
- Escalation paths and expectations
- Clear decision making
Establish routines: Plot activities into calendars and align as a team

<table>
<thead>
<tr>
<th>Time</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
<th>Friday</th>
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<tbody>
<tr>
<td>07:00</td>
<td>Daily (15’)</td>
<td>Daily (15’)</td>
<td>Daily (15’)</td>
<td>Daily (15’)</td>
<td>Daily (15’)</td>
</tr>
<tr>
<td>08:00</td>
<td>Office hours - open time for team reachout</td>
<td>Office hours - open time for team reachout</td>
<td>Weekly planning and prep for owner mtg</td>
<td>Project mtg with owner</td>
<td>Team retro (30 min)</td>
</tr>
<tr>
<td>09:00</td>
<td>2 virtual work observation (x 45’)</td>
<td>Virtual Big Room Time</td>
<td>RFI and Bulletin Management</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10:00</td>
<td>Lunch</td>
<td></td>
<td></td>
<td></td>
<td>Quiet work time for team</td>
</tr>
<tr>
<td>11:00</td>
<td>Problem solving (1 hr)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12:00</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Lunch</td>
<td>Team Lunch</td>
</tr>
<tr>
<td>13:00</td>
<td>1-1 coaching</td>
<td>Quiet work time for team (My email &amp; work time)</td>
<td>Quiet work time for team (My email &amp; work time)</td>
<td></td>
<td>Recognition</td>
</tr>
<tr>
<td>14:00</td>
<td>Weekly mtg with architect</td>
<td>Problem solving (1 hr)</td>
<td>Director meeting</td>
<td></td>
<td>Virtual Happy Hour!!</td>
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<tr>
<td>15:00</td>
<td></td>
<td></td>
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<td>16:00</td>
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<tr>
<td>17:00</td>
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What leadership traits are most important when teams are remote?
Lead differently

**Be Accessible; Be visible**

**Remind People on Purpose**

**Be Transparent – Thinking and Decisions**

**Be humble and lead by asking**

**Understand & Empathize with Employee Challenges**
Communicate continuously, leveraging the channels that work

- Overdo the listening
- Set up communication norms
  - what channels to use, and for what
  - How quickly should one respond
  - Public vs private communication
- Have consistency in cadence and norms
  - Reliability increases trust
- Keep the 1-1 meetings
- Have “fun” channels / meetings
- Leaders should plan time to prepare communications

*Don’t just communicate...Connect!*
Customize your approach to the personalities in your team

<table>
<thead>
<tr>
<th>How personalities react to...</th>
<th>Preferences are distributed across a continuum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Management</td>
<td>More likely to take breaks for quiet time</td>
</tr>
<tr>
<td></td>
<td>More likely to take breaks to talk to someone</td>
</tr>
<tr>
<td></td>
<td>Frustrated by lack of quick response from co-workers</td>
</tr>
<tr>
<td></td>
<td>Frustrated by lack of completeness on communications</td>
</tr>
<tr>
<td></td>
<td>Would prefer external pacing</td>
</tr>
<tr>
<td></td>
<td>Self-pacing</td>
</tr>
<tr>
<td>Communications</td>
<td>Find reading and reflecting more useful</td>
</tr>
<tr>
<td></td>
<td>Find webinars and live presentations more useful</td>
</tr>
<tr>
<td></td>
<td>Do not prefer video</td>
</tr>
<tr>
<td></td>
<td>Prefer video</td>
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<tr>
<td>Solo work</td>
<td>Enjoy solitude and use to focus</td>
</tr>
<tr>
<td></td>
<td>Solitude increases feeling of stress</td>
</tr>
<tr>
<td></td>
<td>More organized with remote office</td>
</tr>
<tr>
<td></td>
<td>More organized with stable office space</td>
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</tbody>
</table>
Build Skills

Time Management

Listening (remotely)

Expressing oneself

Technology
Technology can help make remote work more effective

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Example Applications</th>
</tr>
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<tbody>
<tr>
<td>Real-time collaboration on documents</td>
<td>Microsoft Teams</td>
</tr>
<tr>
<td></td>
<td>Miro</td>
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<tr>
<td></td>
<td>Mural</td>
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<tr>
<td>Video Conferencing</td>
<td>Zoom</td>
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<tr>
<td></td>
<td>Skype</td>
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<td></td>
<td>Webex</td>
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<tr>
<td>Document Sharing</td>
<td>Box</td>
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<tr>
<td></td>
<td>Sharepoint</td>
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<tr>
<td></td>
<td>Baidu</td>
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<tr>
<td>Social chatter</td>
<td>Slack</td>
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<tr>
<td></td>
<td>Yammer</td>
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<tr>
<td></td>
<td>Hipchat</td>
</tr>
<tr>
<td>Workflow Management</td>
<td>Trello</td>
</tr>
<tr>
<td></td>
<td>Jira</td>
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<tr>
<td></td>
<td>Asana</td>
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<td></td>
<td>Smartsheet</td>
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- All tools have advantages and disadvantages
- Providing training, support, and customization to your context is key to making it useful
- Tools often integrated to enhance the user experience e.g. Zoom combined with Miro
- Tools are rapidly evolving, providing opportunities for enhanced features in the future
Why is all of this so important now, anyway?
Q & A
Quick reference guide for virtual meetings is coming your way...
Key Take Aways, Questions & Answers
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22ND

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OCTOBER 19-23, 2020
Detroit, Michigan

www.lcicongress.org/2020/

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Meeting Feedback

PlusDelta App

Please visit https://plusdelta.app/join/320486
THANK YOU!

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