Q&A: Strategies for Managing Remote Teams

APMP members: there is a lot of content in this document! Click on the links to jump ahead to the content that you're looking for.

<mark>A quick note:</mark> In our remote leadership certificate series, we dive deep into topics that cover many of your questions (culture, communication, managing performance, conflict management, vision, and learning & development). The first workshop in the series is happening on **Thursday, June 28**, from **3-5 pm EDT**. If you are interested in learning more about these topics, visit http://www.workplaceless.com/p/leadplaceless

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Questions/Challenges
1. I'm wondering how accountability for activities relates to these common challenges. Seems easier to dodge responsibility when remote.
    a. Accountability comes down to culture (trust) and expectations—sometimes deliverables and tasks need to be more explicitly explained in a remote environment.
2. Our challenge: Our culture is based on colocating entire team in same location, so remote work is highly discouraged and not easily done.
    a. A provocative question here to get to the root problem: If you can't trust your team to do work without you watching them, why are they on your team? I would work at addressing the root problem here, which seems to be related to workplace culture.
3. How often and in what form should remote teams "meet" ?
    a. This depends on the team and the project, but some sort of communication daily is necessary to keep proposals moving forward.
4. Some of the problems could also be lack of motivation, how can a manager improve the motivation on remote teams?
    a. Self management can be supported by setting up clear structures for remote team members who seem to suffer from lack of motivation. Always look at what is behind the lack of motivation: is it perhaps because they are overwhelmed?
5. How do you approach poor performance with a remote team member?
    a. Set very clear expectations on KPIs along with exactly the kind of behavior that meets those KPIs. Regularly check in and provide consistent productive

feedback on performance. Put a clear plan in place for what will happen if KPIs are not met.

6. Do you have any suggestions about project dashboarding and monitoring?
    a. [See the suggested tools in the strategies provided by fellow attendees](#)
7. As the end of the line for many proposals, I routinely work with high-level executives that are submitting content that ignore deadlines. They all think they can do it because they are so busy, but it very regularly results in the proposal being done at the last minute and review processes eliminated as a result. Any ideas for overcoming this?
    a. Give them due dates that are much, much earlier than you need them. Also, perhaps break this up into smaller tasks that may increase the likelihood of those getting done. Constant communication.
8. Not all of my remote team are confident to use virtual comms tools, such as video conferencing, lync screen sharing etc which causes time delays as there is a knowledge gap in user tools, as well as project delivery
    a. Providing onboarding materials that include training on how to use these tools. For example, a video tutorial of how to use video conferencing (if you don't have software that records screencasts, you can use Loom, a free tool)
9. Issues where teams are remote and are also typically working together for the first time would be useful.
    a. Document everything! The more you have documented, the easier it is to onboard new team members.
10. What is a strategy for ensuring participation during remote led meetings; e.g., not multi-tasking?
    a. Having a clear agenda and sticking to it is the best way to keep people from multitasking. Other tips: Assign roles to all attendees (rotate minute taking, etc.),
11. how do you stop people from being isolated?
    a. Include them! Daily communication, plus opportunities to connect with one another in more informal settings.
12. How could we alleviate poor connectivity on phone calls from someone calling into a meeting remotely?
    a. Have specifications for connecting remotely that are required (e.g. headphones, quiet location, type of phone). Contact your conference call provider to ask what settings, tools, etc. work best and provide that information to all attendees. And always provide a backup plan!
13. Do Proposal Managers prefer to "publish" the proposal schedule after it's finalized… i.e., all meetings are scheduled well in advance, or more on an as-needed basis due to delays or changing developments?
    a. I'll leave this for other Proposal Managers to answer! If you have feedback, just comment in this Google Doc (or send an email to tammy@workplaceless.com, and I'll add it in)

14. what is the best way to approach management when there is a known "trust" issue that management may not acknowledge or accept?
    a. Trust is about culture—and if there is a trust issue, AND ignoring that issue on top of it, that compounds the dysfunction. Document the problem (all symptoms and effects) and communicate them. Approach the management team that is closest to you to present the problem and see what can be done.
15. What can a manager do to help a remote team to not feel isolated, to feel they really are part of a team?
    a. Include them! Daily communication, plus opportunities to connect with one another in more informal settings.
16. In our site environment, getting it done is possible by knowing our SMEs/leadership and their patterns, and communicating within those. Do remote teams have the same connection to relationship building to help the gears turn?
    a. Yes!
17. Why do local employees prefer to tune in remotely, rather than attend in person?
    a. There could be many reasons, they could be personal or not. It could have to do with childcare, health, transportation, or it could just be that they are more productive when they work from home.
18. How to best on-board new hires that are joining a remote team
    a. 1. Have a schedule outlined for their first day. 2. Provide as many templates, examples, walk-through videos, etc. as possible, ideally in a centralized location. If your company doesn't have a Learning Management System (LMS) they probably do have a Content Management System that can be used to house onboarding materials. 3. Set expectations and communicate them early and often.
19. How can we quantify how much more productivity remote providers provide the company?
    a. In order to compare productivity accurately, you would need to compare the same metrics in the two groups, like deliverables or billable hours.
20. Tips for what to do when you don't have a consistent team and get new team members for each bid?
    a. Document everything! The more you have documented, the easier it is to onboard new team members.
21. some people feel slighted if they are not part of all meetings
    a. Communicate that their time would be better spent on other tasks if they are not needed at a meeting.
22. A big issue I find is that a lot of people are multi-tasking and aren't paying attention during the meetings
    a. Having a clear agenda and sticking to it is the best way to keep people from multitasking. Other tips: Assign roles to all attendees (rotate minute taking, etc.),
23. are video calls better than voice only for remote teams?

a. For some teams, this helps create more of a connection among the team members. Depending on your team members' bandwidth, you might consider requiring videos on for some meetings.
24. do you have a recommendation for concerns about recording a meeting?
    a. I am not sure if this is referring to logistics or privacy concerns. Concerning privacy, an interesting take on this is Bridgewater's "Radical transparency".
25. I used to have a staffer who never let me know when she was done with a project (in spite of my asking repeatedly). She'd just assume that I'd see a project was done in a shared file.
    a. Try having this person repeat their interpretation of the expectation. Sometimes it just takes a verbal acknowledgment for it to sink in. Communicate that it is a key behavior that affects the team, so it's part of her overall performance.
26. This appears to be mostly geared toward managing the members of a particular deal team. Do you have tips around staff management of other proposal managers/professionals in a remote setting?
    a. Document everything and constant communication in order to have consistency among managers.
27. Tips for what to do when you don't have a consistent team and get new team members for each bid?
    a. Document everything! The more you have documented, the easier it is to onboard new team members.
28. What suggestions do you have for managing a team if you're brought in when the proposal is halfway done, and the team dynamic is already set?
    a. First, work on assessing what the current culture is—not only are you respecting what the team has created up until that point, but you also give yourself the opportunity to see whether there is overlap between your ideal dynamic and what is already in place.
29. Any suggestions for scheduling meetings when you don't have insight to everyone's calendar?
    a. You can use a tool like Acuity scheduling to manage an organization's calendars or a tool like Doodle
30. As a proposal manager, I cannot control someone else's workload. At what point do I escalate to that person's manager?
    a. If it is affecting deadlines and the probability of winning a bid, immediately.
31. Do you have a sample "standard meeting agenda" and/or "standard timeline doc"?
    a. Sample agendas are here
32. How to do you handle someone who always misses deadlines? (I've already discussed with them the problems it creates and they still miss them.
    a. Set expectations, figure out what the root problem is (workload? confusion?) and clear repercussions for when those expectations are not met. Then, follow through!
33. Tips to transition an on-site team to being a (mostly) remote team.

      a. This requires a change management approach—there are different models for change management, the one that I use (per my certificate) is the ATD model: Establish sponsorship and ownership of change; Build involvement; Create a contract for change; Conduct diagnostic assessments; Provide feedback; Facilitate strategic planning for change; Support the change solution; Encourage integration of change into organizational culture; Manage consequences; Evaluate change results.

34. If trying to implement a remote approach in a traditionally on-site-only company (part of the culture), how would you go about doing that?
      a. This requires a change management approach—there are different models for change management, the one that I use (per my certificate) is the ATD model: Establish sponsorship and ownership of change; Build involvement; Create a contract for change; Conduct diagnostic assessments; Provide feedback; Facilitate strategic planning for change; Support the change solution; Encourage integration of change into organizational culture; Manage consequences; Evaluate change results.

Additional strategies as suggested by APMP members:
1. Friendly reminders about upcoming milestones.
2. SharePoint site and Yammer Group
3. partnering on proposals
4. Set timeline on the kickoff call - helps a lot.
5. Assigning tasks through comments in Google Drive.
6. Weekly checkpoints calls with management
7. Weekly videoconference
8. Use of video chat
9. one on one meetings
10. 2 X a week - 30 min discussion
11. I find breaking down tasks into small, manageable activities, due the same day, works better than abstract asks or long term deadlines
12. share responsibility and goal
13. Put timelines and action required in email subject line
14. regular meetings
15. comprehensive weekly meetings
16. We used templates in Outlook to keep processes and communication consistent.
17. Always talk to the lower common denominator. There is at least one person on the team who has never worked a bid before and has no idea what comes next or when or why.
18. Informal coffee chats helps us feel connected.
19. Creating a focus page, including client details, strategy, due dates etc. on the front page of each template for all SMEs
20. brief daily check ins, even if a quick Skype meeting.

21. Agenda
22. Monthly comprehensive roundup
23. Face to face kick off at the start if possible to encourage engagement and then the rest is usually fine to be done remotely
24. group email box so all are copied on certain topics
25. In-person visits
26. specific standard proposal timeline submitted after kick off call
27. daily phone call with team member
28. Use proposal mgt sw like Privia or SharePoint
29. Consistency and history - walk the walk
30. project status call every day
31. Asking everyone on the line (by name) if they have any questions on a call
32. Status Update emails.
33. screen sharing response matrix etc.
34. Response allocation tables/spreadsheets
35. Personalized communication
36. ice breaker questions during kick off meeting
37. OneDrive for collaboration on writing.
38. Send daily recaps
39. peer reviews
40. project calendars
41. Shared team calendar.
42. video chats
43. Face-to-face All Hands Meetings Quarterly
44. Summary of action items emailed after meetings.
45. Plan on a Page for bid timeline
46. Frequent Skype calls to make sure they've heard from you regularly and ask if there is anything they need to raise (as opposed to just jumping straight into what support you need)
47. Speak first, then email to summarise outcomes afterwards.
48. using IM to check on status
49. bi-weekly writers calls
50. assigning tasks during kickoff
51. we have a standard set of meeting and milestone emails that everyone uses so that contributors know when there are milestones
52. Part of my strategy is that the time zone is based on the location of the proposal lead. I am usually the lead so all times are EST.
53. creation of a shared space for documentation
54. Weekly check ins, Sharing of Best Practices is owned by all (helps engagement and empowerment), Monthly Reporting - shows all we've accomplished YTD and Monthly.
55. Draft questions for daily tag-up and to whom they are for to engage during meeting.
56. Realistic time frames
57. We have bi-weekly all team meetings;   subject lines in emails that are well labeled;

58. shared Production calendar of bids due
59. quarterly onsite meetings where we work toward big goals together in a room for a few days.
60. using Salesforce to close out projects immediately
61. using video Skype
62. Offer samples as suggestions.
63. Keep things rolling
64. Yes, shared team calendar
65. Proposal tracker so everyone in group knows what the other is working on and if someone needs help
66. give all people the feeling that their work influence the work of their colleagues
67. Requiring work-sharing as time allows - allows them to feel that they work together, even when they are remote.
68. Collaboration site in place with membership and permissions properly assigned
69. daily stand ups to discuss schedule, completion status on assignments, resource issues
70. Bid artefacts status list / tracker
71. partnering across time zones for efficiency
72. We use a Google Sheets Workbook shared with the Team that has Proposal basic information, Roster, Schedule/Calendar, Outline, Questions for Submittal, Action Items, Delivery Requirements, Evaluation Criteria, Milestones
73. I use a Proposal Implementation Blueprint I created and use it to assign tasks and it's sent to everyone.
74. SharePoint
75. we use oneNote
76. SharePoint
77. Qvidian
78. PleaseReview
79. Box
80. SharePoint
81. Virtual Proposal Center (VPC)
82. Sharepoint
83. PleaseReview
84. We use shared folders and SharePoint
85. SharePoint)365
86. MS Teams
87. We use OneDrive
88. Microsoft Teams and OneNote
89. We use a standard SharePoint structure for every proposal. Everything runs off the home page.
90. SharePoint
91. Salesforce
92. Sharepoint

93. One Drive (but I hate it)
94. Other collaboration tools - SharePoint, Privia
95. VPC-Virtual Proposal Center
96. Sharepoint
97. instead of Google, we use BOX
98. I had connection issues and have only just been able to join, could i be sent the presentation please?
99. Webex
100. We have a custom SharePoint
101. Office 365 / OneDrive
102. we use a live editing feature on our sharepoint server
103. Sharepoint, Dropbox
104. Evernote
105. Webex Teams
106. Use sharepoint
107. SharePoint
108. Privia
109. Sharepoint + O365 Word; Teams
110. Collaboration with O365 and Zoom
111. SharePoint
112. One person collates everything into a master document and send out the next iteration of the response with an upped version number
113. sharepoint
114. Qvidian and Smartsheet are great tools for proposal management
115. Shared folder contains Reuse Library and folders for the different Proposal

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Sample Agenda 1

From APMP Member Daniel Walker: I've worked on over 500 remote team kickoff meetings—I find the agenda below to be useful.

What's key, in my experience, is to understand the RFP in advance, map sections to owners, and define page counts/deadlines in advance of the meeting. Before I even schedule a call I like to build out the following items and share them with a team:

- Customer profile—determining the customer's needs and expectations
- Proposal strategy—determining what makes us unique and ready to bid
- Proposal schedule—setting milestone dates, times and dates for update calls, and review times
- RFP

- Deliverables menu—every bid looks different, and form time to time we create videos and other digital content, the team needs to know what's available and how long it takes to put these things together.

Even if it's not clear how large the team will be, or who will be attending, planning in advance saves grief. For example—if I'm doing an Oracle ERP implementation, I know I'll have a technical lead on the team, and I'll have a change management manager, I can assign RFP sections to these people and set deadlines without knowing who they are. Finally, remote teams work better if they have something to which they can react, rather than abstract planning, so doing this lets me build out outline of the full document in advance.

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Kickoff Meeting Agenda

1 Hour

Suggested attendees: proposal manager, proposal writer, SMEs, illustrator, capture manager

Agenda:
1. Introductions, share background on the opportunity and learn team names/roles
2. Share RFP, proposal management plan, and outline
3. Distribute RFP sections to team and assign areas to content owners.
4. Find an alternate contact for each content owner
5. Share ongoing status meeting times/dates
6. Don't let the team chime in on this—tell them when meetings will occur
7. Discuss timelines and expectations for next steps
8. Determine if stakeholders are out of the office or have other commitments
9. If you're working on a large team, schedule smaller group meetings with key stakeholders
10. Schedule a follow up meeting to discuss win themes, customer needs

Sample Agenda 2:
00-PreKick Off Call with SE

IN SUBJECT LINE - PUT NAME OF ORGANIZATION, STATE - PRE-KICKOFF CALL WITH SE

The reason for this call:
1. Introductions
2. Review RFP documents with sales. Discuss requirements, especially those that are challenges or may require 3rd party solutions.

3.   Discuss people needed to be invited to Kick Off call.
4.   Hardcopies if international - where are they to be printed? Will you be hand delivering?
5.   Timelines for this proposal
6.   Proposal formatting
7.   Any challenges foreseen on this proposal
8.   Expectations
9.   Confirm Product List that was received from our Analysts
10.   Kickoff Call - What I ask from the SE:

SE overview of the project
Includes:
a.   Scenario of this client
b.   Goals of this RFP
c.   What you want this RFP to focus on
d.   3 themes you wish to have woven throughout this RFP
e.   Competition – other bidders (if known)
f.   Any differentiators
g.   Possible Business problems / and strategies
h.   Total Client Value (TCV) for this proposal

01-Kickoff Call

1.   Roll Call

2.   SE Review
    a.   Scenario of this client
    b.   Goals of this RFP
    c.   What you want this RFP to focus on
    d.   3 themes you wish to have woven throughout this RFP
    e.   Competition – other bidders (if known)
    f.   Any differentiators
    g.   Possible Business problems / and strategies

3.   Detailed list of proposed solutions:

4.   Roles and responsibilities

5. Project timeline
        1st Pass due
        Clarification Questions Due -

2nd Pass due
Editor Review -
SE / AVP Review -
Pull all documents together into one response -
SE / AVP Final Approval of Response -
Production (Proposal Team) –
Submit to FedEx –
Deliver to Client –
Due to Client –

02-Status Team Call:

Personal Call Number:

IN SUBJECT LINE - Status Call NAME OF ORGANIZATION, STATE

Team,
This Status call is to discuss the progress of (NAME OF PROPOSAL) for (ORGANIZATION).

SharePoint Location:

Agenda for Status Call
1.   Roll Call
2.   Client updates (possible last minute changes or requests by client).
3.   Confirm Executive Summary has win themes and is customer focus.
4.   Confirm there were no issues in 1st pass
5.   Check to see if there are Sections the Editor can review
6.   Confirm there are no delays in Pricing
7.   Round table discussion

How do you describe an ideal remote team?
- Communication!
- Cohesive
- Collaborative
- technology
- dedicated
- Fully engaged
- connected

- prompt
- Trustworthy
- Responsive
- Informed
- One in which everyone acts independently and responsibly.
- No ego
- as connected and in-sync on workload as possible.
- integrated
- flexible
- Available
- Independent
- diverse
- Productive.
- Organized
- No boundaries even if overseas
- Self-managing. Highly responsible.
- self-sufficient
- Focused and "tuned-in"
- Accountable
- Lean-in, or participate
- Unified
- constructive
- Seamlessly Integrated
- Everyone shows up!
- Empowered

Possible reasons behind the symptoms/effects of root problems:
1. Team member is too swamped.
2. Not enough bandwidth on their part.
3. Attending meetings
4. they are behind schedule
5. they don't realize how important their role on the proposal is
6. you have the wrong email
7. Technology problems
8. May be working on another bid / project.
9. Team culture
10. Unclear expectations
11. Not dedicated to the project
12. Too much work
13. Having too much work from other directors

14. Swamped
15. not at desk
16. too busy working on other projects
17. not a priority
18. Over extended
19. Fear of not knowing answer
20. Lack of accountability.
21. They might have no power and phone/computer is out of action
22. What is the expectation re: responsiveness? Immediate?
23. are you expecting them to respond outside their core hours and nofactoring in time differences? or tech issues?
24. IT issues
25. Too many other commitments
26. Didn't understand the request
27. too busy - not reading emails
28. technology failure, natural break, other priorities
29. They have other things going on.
30. too busy
31. out of the office
32. Personal life in the way
33. coverage - too much work
34. technology issues
35. Might not be how that team member best communicates/likes to discuss.
36. other tasks; personal;
37. they don't know the answer or don't think they are responsible
38. didn't know response was requested/required
39. Distracted by something else
40. Assuming that someone else will respond
41. Other priorities
42. other priorities
43. on a project deadline
44. poor communication links
45. Not actually working like he/she is supposed to
46. unclear about their role
47. Cannot connect
48. To avoid fessing up that they haven't finished the assignment
49. lack of capacity,
50. or expertise
51. Bad contact info
52. Project not a priority
53. Overwhelmed by project demands.
54. Not have phone with them
55. too busy

56. RFPs are not priority
57. Busy working on a bid.
58. They are tied up on other projects, and have very limited availability.
59. Spread too thin. Poor time management skills.
60. Team member has competing priorities and cannot prioritize
61. on other assignments
62. focused on this project
63. Thyre' trying to focus and don't want the distraction.
64. we're using the wrong channel based on importance of the communication
65. does not mark time off
66. priority
67. out of office, traveling
68. being passive aggressive
69. Overwhelmed
70. Haven't done their assignment yet
71. don't think it's important to communicate
72. too busy to deal with crazy person
73. think it's not their job
74. audio went dead.
75. think someone else should own
76. Personal problems interfering (making them less invested)
77. Different time zone
78. they think they can submit and help with their content / section at the last minute.
79. they don't understand the requirements
80. our people are often out of the office traveling or just don't have time
81. others just don't read emails at all
82. Again, swamped or a deadline
83. conflicting meetings
84. It's back.
85. timezone conflicts
86. Didn't get or see the invite
87. Not prepared
88. not prioiritising bids
89. Too busy
90. Importance of meeting unclear
91. Existing commitment
92. Unsure of purpose of meeting
93. Other responsibilities
94. Small part of their overall job
95. called away at last minute
96. Conflicting meeting
97. other deadlines, conflicting meetings
98. working multiple proposals simultaneously

99. Conflicts with other meetings.

100. Travel

101. No excuse to not advise manager not available.

102. project is not important to them

103. Location is too far away from their base

104. People is involved in several duties, and their priorities are out of my control

105. conflicting meetings, typically. but i would get notice they'd not be in attendance

106. They may feel someone else has it covered

107. are you considering different time zones when planning the meetings

108. Not sure it was important for them to be there

109. Too many other commitments

110. Time zone differences

111. Miscommunication

112. not aware

113. too busy

114. Unsure of priority of this item

115. Don't value proposal

116. too small a role/waste of time feeling

117. Double booked;

118. don't feel it's applicable

119. Other deadlines

120. waste of time to hear other people

121. not assigned to the project

122. under deadline

123. at another meeting, out of the office

124. Traveling or on another project/deadline

125. expect action items to be sent to them

126. Distance from the rest of the writers makes them less invested and joining the meetings less pressing

127. Out of office

128. They are not engaged

129. don't understand their role

130. Miscommunication.

131. other deadlines, deliverables

132. Not feeling valued.

133. lack of commitment

134. They don't understand the mandatory expectation to attend.

135. other commitments

136. Not familiar with the meeting/collaboration tool

137. Other priorities

138. Unclear on how to prioritize conflicting meetings

139. Disengaged

140. Forget

141. If I know someone is likely to skip, I'll call them and let them know their attendance is important
142. Didn't get the invite.
143. Don't see it as a priority.
144. prioritization problems
145. lack of clarity over the proposal
146. SME procrastination
147. proposal manager didn't stay in close contact
148. more complex than anticipated
149. Unclear who was responsible
150. did not understand schedule
151. miscommunication
152. wasn't reminded of task
153. Other priorities competing for the deadline.
154. team not briefed effectively of critical milestones
155. Not getting proper support from SMEs, and this trickles down
156. Content development takes more time than anticipated
157. Unclear on requirement/expectations
158. Deadline not communicated well
159. multiple people needed to be engaged to complete the assignment
160. Bad time management
161. bad planning
162. did not understand importance of schedule
163. Key decisions not made timely
164. coverage - not clear who was responsible
165. wrong/unclear instructions
166. assignments weren't clear
167. too many other fires to put out
168. misunderstanding regarding responsibilities
169. trying to "make it perfect"
170. too heavy of workload
171. SMEs responses late
172. not understanding expected deadline
173. heavy workload
174. team doesn't understand the timeline
175. traveling
176. Underestimation of how long the task would take
177. Poor time/workload management
178. poor project management
179. SME not collaborative to complete.
180. Person not prioritizing.
181. Domino-effect delays
182. not staying on task

183. Don't understand customer requirements
184. unable to prioritize
185. SME have disregarded your request
186. Company culture allows for people to disrespect deadlines.
187. Didn't understand expectation or didn't understand the questions.
188. time management
189. status was not received at stand ups
190. Too many cooks in the kitchen
191. Culture of not meeting deadlines
192. Doesn't understand why deadline has been set so early in the programme.
193. NOt understanding the piece they were writing and too embarrassed to ask
194. Misunderstanding the ask…lack of clear small, manageable deadlines.
195. Project timetable not clearly laid out.
196. waiting for info from others
197. workload and time management
198. Solution is not complete
199. lack of understanding to request
200. Deadlines are fluid and not enforced
201. Poor time management, SMEs focusing on pricing verses proposal.
202. person had a personal emergency
203. scope has changed
204. Lack of proper planning
205. SME doesn't understand the question / requirement
206. SMEs don't agree on strategy
207. disrespect for timeline set
208. Lack of follow up?
209. lack of commitment
210. Sidetracked
211. better proposal management, escalation
212. heavy workload
213. underestimated the work involved
214. Writers have been allowed to slip before, think it's ok
215. Mixed signals as to what was required
216. unclear roles
217. Others are not responding in time
218. did not have the knowledge to write the section and was reluctant to state that there was no knowledge