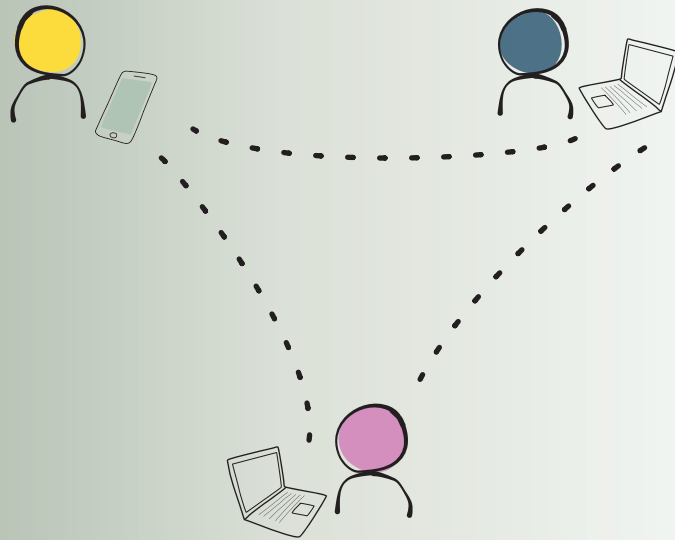


DESIGNING COLLABORATION

Playbook
series

Playbook for Remote Working



Simple steps to generate great collaboration behaviours and ensure best use of your digital workplace collaboration tools

Presented by  **Innosys**

Hargraves
INSTITUTE

DESIGNING
COLLABORATION

Playbook series

Remote Working
Playbook

Written by Alister Webb
with Andrew Pope

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DESIGNING COLLABORATION

Playbook series

Sections of the content in the Playbook series are derived from:

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MORE INFORMATION

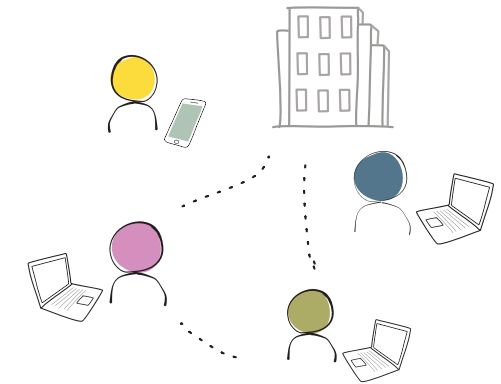
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← Important!



Welcome to the Playbook for Remote Working



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READ ME FIRST

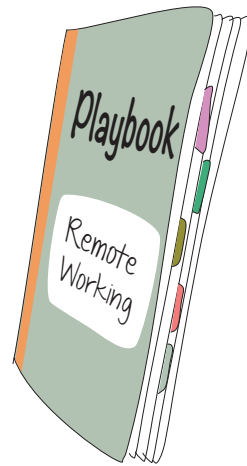
This playbook* contains tips and advice designed to assist you and your team to collaborate effectively when the team is geographically dispersed yet still needs to work as a highly efficient entity to deliver on its objectives.

In this situation, the team workplace is a virtual one, where habits learned from years of office-based working need to be adjusted for a purely online collaboration and team-working experience.

Team leaders and team members

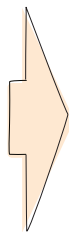
The playbook is divided into two sections: team leaders and team members. There is of course overlap, which is part of the reason they are presented in the same playbook. Neither is of itself more important than the other.

Equally, it's important that team members and team leaders understand the expectations placed on each other, for the mutual benefit of the team's overall performance and success.



“ The challenge is to bring the best habits of analogue, face-to-face collaboration across into the realm of digital collaboration. ”

Analogue collaboration



Digital collaboration



* For a list of all playbooks in this series, see the inside back cover.

Note on Australian/UK spelling

English is a complex language, and this extends to different English-speaking countries having different spelling conventions for certain words or word types. Organisation versus organization. Colour versus color. Analogue versus analog. Just some examples.

We operate out of the UK and Australia, which share a common convention, so we have opted to be true to our roots and retain those spellings.

COLLABORATION AND REMOTE WORKING

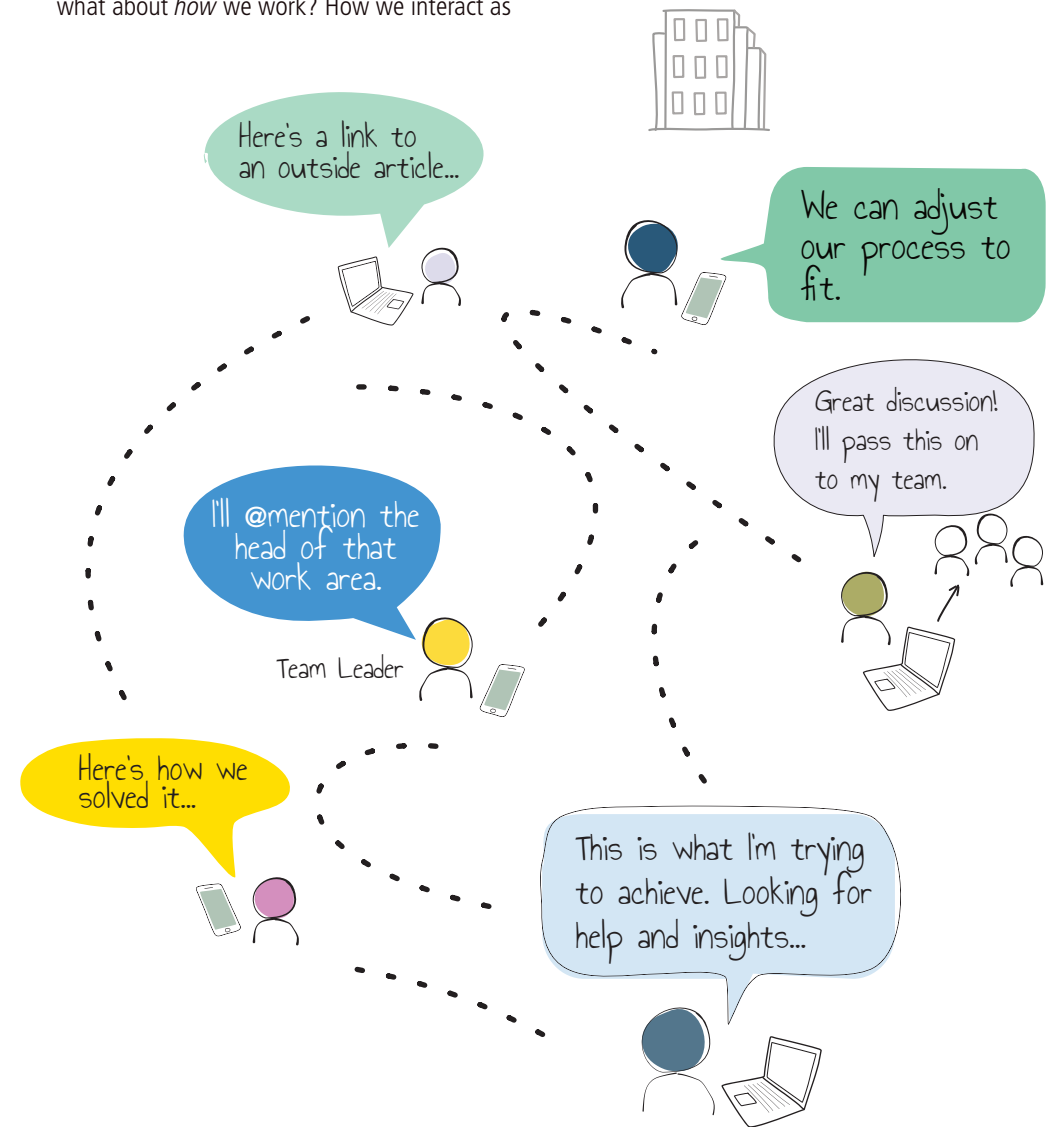
Remote working has long been a choice for many – part of flexible working patterns, or for the self-employed.

In more recent times, many of us are now in a situation where working from home with online collaboration tools, whether as a temporary measure or as a new, permanent way of working, is the new normal, replacing traditional office-based working.

But no matter how good the digital tools are, what about *how* we work? How we interact as

humans? How can we thrive as virtual teams when previously it revolved so much around working in an office environment?

This short playbook, based on years of experience working with remote team leaders and team members in a range of organisations, presents simple but highly effective working habits that can be adopted by leaders and members of remotely working teams in any organisation, right now, today.



Here we list the individual actions



TEAM LEADERS

YOUR TO DO LIST

1. Create a safe place, build an environment of trust

This is number one for good reason. Remote working is underpinned by trust. The best thing a digital leader can do is to *create a sense of safety* – that their teams are trusted to do the right thing.

Building this kind of trust means that a team leader has to relinquish some control – things have changed, it's impossible to know everything, so don't push too hard, too soon.

Remote working thrives when we are honest. This all stems from team leaders being open, honest and candid themselves. Admit to your team what you are finding hard. Equally, share what *is* working.

Set new expectations across your team based on this new way of work.

2. Set clear goals for what we're working on

To trust our remotely working teams, setting them clear goals on deliverables rather than drip-feeding instructions is more effective. It may be harder for a team member to deliver on a task when remote than when in the office, so set goals on what is needed for the week, the phase or whatever staging works best.

Those who regularly remote work do so based on a clear understanding of what we need to deliver, not a list of instructions. As it's based on trust, this goes both ways.

3. Be there to listen, not to task

If you want remote teams to thrive, listen to their needs. What are the barriers to them completing their work? Help them to overcome them. It's no use providing micro-tasks if there are new barriers we have to overcome. Working on large files, for example, may not be possible if you have low bandwidth. But what can we do instead?

Make it clear that you are open and are there to help get work done, not to be a barrier yourself by adding unrealistic expectations.

4. Appreciate that not everyone has the perfect home-working space

For those of us who haven't worked remotely that much, we are unlikely to have the perfect set-up. There may be children at home, we may not even have a separate room to work from.

Acknowledging this, and finding ways to support it, such as flexible hours, will allow your team members to find ways of being productive before we've got to end of the week and find out that they haven't even been



Here you can record your progress



ACTIONS

Completed

Create a safe place, build an environment of trust

Openly share anecdotes about my remote working situation each week. What's good, what's bad?

Week 1: Posted

Week 2: Posted

Week 3: Posted

Regular practice

Set clear goals for what we're working on

Short term deliverables that depend on effective team collaboration:

..... Agreed & communicated

Longer term deliverables that depend on effective team collaboration:

..... Agreed & communicated

Appreciate that not everyone has the perfect home-working space

Check around the team to understand their home-working scenario

able to log on to the company network.

5. Create a community space for the team

A dedicated community space allows the team to share their personal side of remote working.

This is the equivalent of the corridor conversation, or a chat over coffee. Allow your team to share anecdotes about remote working and how it affects their lives. Give them a place to let off steam and have a bit of a whinge if they want to. Never shut down a negative conversation. Let it run. In our experience, negative conversations that take place in the open - unlike corridor conversations which take place in the shadows - always end with the participants coming up with a solution, or at the very least some constructive suggestions.

6. Make the most of digital work spaces

If you are using Microsoft Teams, Workplace from Facebook, Igloo or any other of the many social networking and collaboration tools out there, this the time to really embrace them.

It's not just about file storage and sharing, accessing corporate content or seeing pictures of the MD looking important. These tools offer a great way to have conversations about what we are working on, whether using team channels, groups or communities. They offer us the way to have visible conversations about managing tasks and asking for help. Use these spaces to the max. Ask. Post. Comment. Read.

Use these spaces to make everyone's tasks and objectives *visible*. Visibility is crucial to remote working. It underscores trust and makes for clear, unambiguous communications across the team.



7. Communicate as a person, keep the human touch going

When missing the face-to-face time, we miss the human touch. The office isn't just work, work, work. The social contact we have is so important for building relationships. So when checking in with your teams, be human, not just a boss.

Share your challenges, don't try to make everything perfect. See who has the crappiest office, the most hideous wallpaper or the most annoying pet.

Be a real person, it's the glue that binds humans together who might otherwise become disconnected.

8. Don't kill collaboration by taking over meetings



When running meetings with virtual teams, ensure that everyone has a chance to have a say. When we're not meeting face-to-face, team meetings need to offer the chance for everyone to speak.

And, if we make meetings purposeful – that there is a specific reason, such as a problem to solve or a task we're working on, then it's more likely to get involvement and discussion rather than just providing an update. After all, we've got everyone together at the same time in the same virtual place, so make the time count.

9. Model what you expect of your team

Perceptions are everything. Hence the importance of behaviour modelling. Of setting the tone through action, not just words.

Use your posts not just to share knowledge, but to guide your team members towards what an effective post looks like: a question rather than a statement; questions that are open-ended and invite ideas; thoughts properly articulated, not abbreviated like a Twitter post. Show how to

ACTIONS

Completed

Create a community space for the team

Name of community space:

Monitor the space every day, or set up a notification for every post

Our team's primary working spaces / channels / communities / Groups (in order of priority):

1.

2.

3.

4.

Make the most of digital workspaces

Check in informally with each member of the team via chat

Spend 20 mins each day reviewing team and other community conversations and respond where I can

Post something personal, add a human face

Give the whole team visibility of tasks

Model what you expect of your team

Model each of these techniques, at least one per week:

● Write a post using an open-ended question, not a statement

● Comment with personal experience or additional information instead of just 'liking'

● @mention a relevant person outside the team

● Follow an influencer or thought leader, and let the team know

● Write a longer post (a short blog) about something either work or non-work-related

● Use a team-friendly hashtag (i.e. from an agreed hashtag list) in a post or comment

respond to others graciously, acknowledging input, inviting opinions.

Write in a similar style to the way you would speak to those same people if they were sitting across the table from you.

All of this sets a precedent for others to follow.

10. Don't forget to bring in outside thinking

High level collaboration is about actively exposing your workgroup/team to new thinking.

Invite influencers from elsewhere in the organisation - or even outside it - into your

team's online conversations. @mention them, run a video session, suggest your team 'follow' them.

Make it just as much about them coming to hear from your team as vice versa.

11. Push the use of video for conversations across the team

Face and expressions are always better than words - period. It removes the sense of distance, of everyone operating at arm's length.

A perception of arm's length is the enemy of remote working.

TEAM MEMBERS

YOUR TO DO LIST

1. Communicate visibly and avoid email where possible

When we can't see each other and don't have the opportunities to share what we're working on in a convenient or spontaneous way, it's important to make our work as visible as possible. One of the most effective ways is to avoid one-to-one emails, and use open-working collaboration tools as much as possible.

Use techniques such as @mentioning colleagues in posts or comments rather than emailing. Be seen, be active in the communities and teams you are part of.



Being visible isn't about being watched – quite the opposite. It's about a shared team awareness, ensuring we can help each other as much as possible when we don't have the benefit of everyday interactions. And that's a very healthy thing.

2. Don't stress if you can't be available every minute – things have changed

Try not to worry if you're not working as well as you hoped. This is a new way of working and we can't expect to adapt seamlessly on day one. Whether it's technology issues, physical space limitations or children that don't appreciate boundaries, it's understandable that there will be teething troubles (perhaps quite literally!) so share your experiences – it's likely that your colleagues will be too.

Knowing that you're not the only one in a sticky situation is actually very helpful.

3. Find ways to have a chat

We're not at our best when we're shut away from society. Working remotely is hard without social interactions, so try your best to find ways to speak with your colleagues – pick up the phone, video call (and please, please turn the video on!), use whatever collaboration tools

ACTIONS

Completed

Don't forget to bring in outside thinking

Potential influencers to target:

.....	<small>Contacted</small>	<input type="checkbox"/>	<small>Contacted</small>	<input type="checkbox"/>
.....		<input type="checkbox"/>		<input type="checkbox"/>

Push the use of video for conversations across the team

My default mode for meetings is now video rather than audio

ACTIONS

Communicate visibly and avoid email where possible

Ways I involve myself in the team's activities and communications:

- @mention colleagues instead of emailing
- Add information to a colleague's post, based on what I'm currently working on
- Raise bona fide business challenges even if the message is negative, to seek help and to gauge if others are also affected
- Publicly thank a colleague for help on an issue rather than sending a private email
- Post about something in a non-work-related social community/Group at least once a week
- Video always on for meetings

Regular practice

you like to message or even share in a group. Just don't keep yourself to yourself.

We're more productive when we have someone to speak with (and not just the cat!).

Connecting with colleagues is vital to our work, yes, but also to our mental well-being.

4. On the flip side, switch off

It's important to stay connected and communicating with your colleagues, but it's equally important to break up these work-focused hours with mental down time. Time to switch off from work and give our brain permission to think about the other important areas of our lives - family, hobbies, social activities like sport, eating regularly and healthily, even just some simple, escapist entertainment.

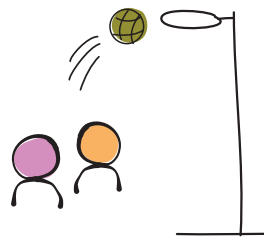
It's called 'escapist' for good reason. Working unrelentingly at the expense of these other areas of our lives can make us captives to our work. This helps no one, ourselves or our employers.

We are at our most efficient when our brains take regular 'switch off' breaks and come back fresher and sharper.

5. Get out and about

It's well known that being sedentary all day is terrible for us physically and mentally. So don't try and be available every minute.

Get out for a walk, a run, throw a few basketball hoops, or even just a stretch on the floor. Leave the keyboard and find ways to keep the blood flowing and the joints moving.

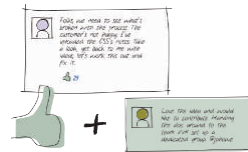


* SWOOP Analytics blog post 'The Power of the ?', www.swoopanalytics.com/the-power-of-the/

Apart from the body movement and exercise, being away from the computer gives us some thinking space. If you can, go for a walk or run in the middle of the day. It's a great way to break up predictable thinking patterns, to think laterally. Our own experience is that we solve more problems when outside than when banging our heads against computer screens.

6. Comment on a post, don't just 'like' it

Liking a post or comment is fine, it provides positive feedback to the contributor and cumulatively can draw attention to the post. It's similar to a nod in an analogue conversation.



The one thing it doesn't do is trigger more conversation.

So as well as clicking the 'Like' button, reply or comment. Do this for the next five posts you would otherwise just 'like'. Ask an alternative question. Add new information. @mention a colleague who has expertise or an interest in the topic. Drive the conversation further down the road instead of just watching it roll by.

7. Ask a question rather than make a statement

Posts that ask a question have been shown, on average, to generate much longer conversational tails than posts that make statements*. It makes sense. Try having a conversation with someone where neither of you ask questions, you simply make statements to each other. It's not going to get very far.



It's no different in the digital domain. Questions prompt longer conversations, and longer conversations mean more knowledge is shared.

ACTIONS

Completed

On the flip side, switch off

Important areas of non-work life I can focus on when I switch off:

- Family / friends
- Sport and/or other favourite social activities:
- Hobbies / passions
- Other

Get out and about

Three physical activities I can choose from as my daily exercise break:

1.
2.
3.

Undertake thirty minutes (minimum) of physical activity every day

Comment on a post, don't just 'like' it

For the next five posts that you 'like', add a comment or reply that moves the conversation forwards

Make it your default way of interacting in conversations

Ask a question rather than make a statement

In your next three posts, include a clear question to draw others into the conversation

At least one in every two of my posts now includes a question

Appendix 1 Simple tips, tricks and examples to help you get involved in online team conversations

Start small, but make sure you start!

To start getting a feel for online conversations, join a community or Group with colleagues who share a non-work hobby or interest: cyclists, parents with teenage kids, sports, something like that. Get used to liking, then commenting, then posting, all in a risk-free environment. Get a feel for how long or short a good post should be, and the best way to write one.

Apart from gaining familiarity, these activities announce to your colleagues that you are now present in the world of digital, keyboard-and-screen conversations.

Once you're up and running, start to drive conversations rather than respond to others.

@mention a colleague. Add a link to a useful research or information page. Add a picture. Apply your growing conversational skills in your higher priority work communities and Groups.

Always look to take the conversation forward rather than watching from the sidelines, i.e. add to a post rather than just 'like' it. Be confident in your contribution, acknowledge the contributions of others.

Examples

'That could work. Or we could borrow the process that Marketing use, so we won't have to invent our own. Thoughts?'

'This is a favourite topic of mine. I read a blog post on it recently. They had some great ideas. Here is the link...'

'I like the approach. Maybe we could go a step further and include an ongoing improvement cycle?'

Keep posts and comments succinct.

A few short paragraphs, maximum. Short enough to make a clear point, but don't skimp on context if it needs it. They should contain one, and one only, discussion point.

Unlike analogue conversations, digital conversations (via keyboard and screen instead of faces and gestures) can easily be derailed as people branch off and focus on several different points.

When commenting or replying, don't go down rabbit holes.

Related to the previous tip, if someone else does take the conversation elsewhere, don't follow them. Avoid this classic (lack of) productivity black hole. Stay with the main topic, the reason you're participating in the conversation in the first place.

More than one clearly defined topic or issue at a time creates conversational clutter. In a face-to-face situation we would bring the conversation back on topic. In a remote working environment, not following a tangent or going down a rabbit hole has a similar effect.

Use simple, plain, everyday language when posting and commenting. Ask yourself, how would I say it if the listener was sitting across the table from me, or standing next to me at a barbecue on the weekend?

Don't get sucked into the Twitter style of compressing everything into as few words and as many hashtags as possible. Balance brevity with clarity of meaning.

Compare these two posts:

a) *'Flat #fieldforce sats. #currentStrategyDoc #innovatetoday Suggestions?'*

b) *'Sadly our latest field force satisfaction ratings are static :(Here is a link to our [strategy document](#). What can we add to improve results?'*

Practise asking questions. Ask an open-ended question at least twice a day.

Examples

'To shorten our feedback loop, what process points do you think we can remove or simplify?'

'I read an in-depth [article](#) about how AI can be applied to customer enquiries. Would this work for our wholesale customers? @Mnevison_InnovationHub @fhalid_CIO_Wholesale'

Practise using the @mention feature at least once per day.

Examples

'These are great scenarios for applying AI to our process. @dsharma_Products @jlonghe_Newtech.'

'Our [new starter video](#) looks good. Relevant to your areas? How can we improve it? @jsnell_HR @mxiang_HR @izahl_HR'

Don't be afraid to subtly flavour your posts and comments with your own personal values and passions where appropriate.

Present yourself as honest and authentic, two of the most important ingredients of collaborative conversations.

Examples

'As a parent, I wouldn't want to my kids to misconstrue our advertising message.'

'I like the fact the research showed how important environmental issues are in our industry.'

Appendix 2 Passive vs Active collaboration

Passive collaboration is the name we at Innosis give to task-focused collaboration. Looking up **x** to achieve **y**. Using the tools to help us get a job done faster, based on an assumption that the knowledge we need already exists somewhere out there in the organisation and the digital toolset is how we access and re-use it.

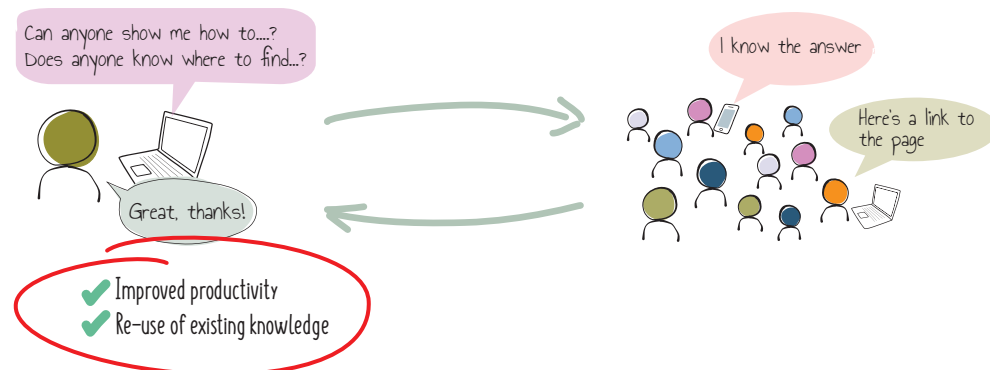
We call it passive because, although valuable in its own right, it stays within the box of existing work practices. It doesn't challenge or change them.

Active collaboration typically starts with a question or statement which opens the door to a conversation. And, by extension, to new and fresh thinking. It's very different from asking a question just to plug a knowledge gap.

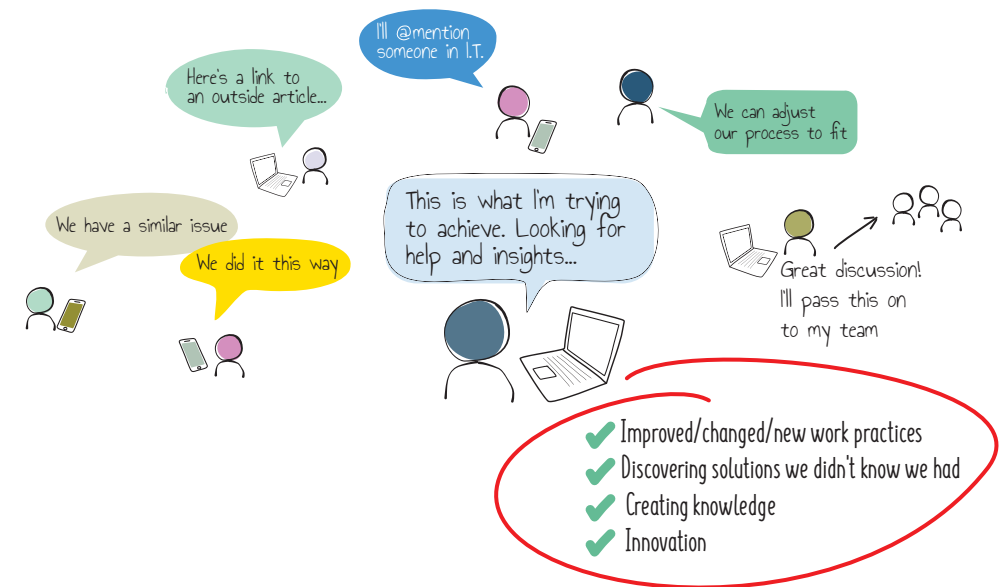
Expressing a business need, big or small, is a powerful way to tease out lateral and creative thinking. It puts out a call for new solutions rather than for an expert to show us the standard approach. It releases us from the constraints of 'this is how we always do it around here', it invites creativity and fresh thinking. Its focus is not 'me', but us. The best result for the team and, by extension, the organisation.

We call it Active collaboration because it actively encourages rich conversations by starting with more open questions, unencumbered by assumptions about what is and isn't 'right' practice. It actively produces longer-lasting, deeper connections than simple round-trip knowledge transactions. It encourages creativity, the open tendering of ideas and left-field solutions. It actively opens the organisation up to smarter work practices by doing what every senior manager wants from their collaboration platform: exploiting the collective intellectual property of their people. (Which in this context is a good thing.)

Passive collaboration Simple round-trip transaction

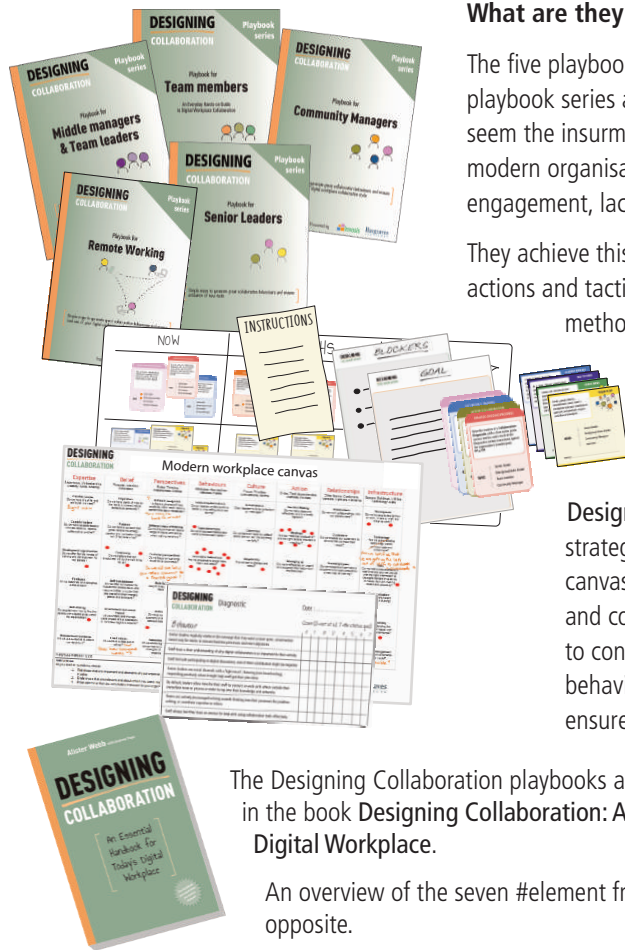


Active collaboration Actively initiating an open-ended conversation...



You can read more about Passive and Active collaboration, with some examples, in **Designing Collaboration**, page 31 and following

More about the Designing Collaboration playbooks



What are they?

The five playbooks in the Designing Collaboration playbook series are designed to break down what often seem the insurmountable barriers to digital working in modern organisations. Lack of adoption, lack of engagement, lack of return on investment.

They achieve this via sets of clear, specific everyday actions and tactics derived from a tried and tested methodology and framework for building highly effective collaborative behaviours across your organisation's workforce.

They are a part of a broader Designing Collaboration solution that includes strategy game-play cards, a modern workplace canvas (to identify your goals and blockers), and collaboration diagnostics that enable you to constantly monitor and improve collaborative behaviours in your organisation over time to ensure the change is long term and sustainable.

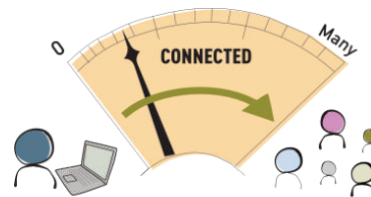
The Designing Collaboration playbooks are built on the framework articulated in the book *Designing Collaboration: An Essential Handbook for Today's Digital Workplace*.

An overview of the seven #element framework is presented on the page opposite.

Collaborative people, not collaboration tools

The playbooks are not technical 'how to' operational manuals for using collaboration tools in the digital workplace. Their focus is on people's behaviours and habits when using the tools. Strategies and tactics designed to unlock collaborative behaviours in your people that will empower them to make the best possible use of those tools.

Simple everyday actions to 'nudge the needle'.



The Designing Collaboration Framework

The seven #elements of great collaboration design

#1 Granting permission to collaborate

Collaboration can only exist in an environment where people feel absolutely safe contributing, trusting that their participation won't negatively rebound on them, trusting that their voice will be heard. We need to overtly grant them permission. It's a fundamental requirement, a bulwark, of successful collaboration.

#1

#2 Setting a vision for collaboration

Why a vision for collaboration is crucial, and how to arrive at one no matter where you are within an organisation.

#2

#3 Get people talking

Collaboration is powered by conversations. What motivates and initiates a workspace conversation? Do we need to adjust our view of what a 'business conversation' actually is? This element is all about ways to get your people talking.

#3

#4 Aligning with work – understand your collaboration touchpoints, and then map the tools

Let's flip the logic. Instead of scratching our heads about how to apply the tools to our work, let's figure out who we need to be collaborating with and, once we get that right, look at how the tools can help us achieve that.

#4

#5 Guidance - avoiding tool confusion

The most common question for staff in the digital workplace is 'What should I use when?'. We address this question by transforming a traditional governance approach into one of guidance – ways that people can be guided through the complexity.

#5

#6 Taking collaboration to the next level – Active collaboration

There are two very distinct types of collaboration. To gain the greatest business value from social collaboration tools, we need to generate high levels of Active collaboration behaviours.

#6

#7 Managing ongoing progress

Tracking progress on your collaboration journey is important. Usage stats, no matter how detailed, do not measure the progress of collaborative behaviours. The good news is, there are very effective ways that you can.

#7

To learn more about the seven #elements, refer to [Designing Collaboration: An Essential Handbook for Today's Digital Workplace](#), pages 37 and following.

SPECIAL THANKS

We would like extend a special thanks to these partners who have helped Designing Collaboration become the end-to-end system it is today.

Allan Ryan and the team at Hargraves Institute

Cai Kjaer, SWOOP Analytics

Scott Ward, Microsoft

Anthony Russell, Workplace from Facebook

Andrew Kratz, Social Edge Consulting

The complete Playbook series

Hands-on tactical guides to develop great collaborative behaviours in the digital workplace

Senior leaders

Middle managers & Team leaders

Community Managers

Team members

Remote Working

'The handbooks you need when you need a manual!'

Is your team ready to collaborate?

Your organisation has invested in some great digital collaboration tools. Now it's time to talk about **collaborative people**. You and your team. Working from different locations, relying on the tools to work at peak efficiency to achieve your team's business goals.

But great collaboration doesn't automatically occur with the arrival of digital tools. Great collaborative habits and behaviours need to be developed, nurtured and eased tactically into teams and workgroups. And when all or part of your team is working remotely, a further set of considerations needs to be addressed to ensure the team, and its individuals, collaborate at the highest levels possible.

The **Designing Collaboration Playbook Series** is a hands-on, everyday guide that will get you and your team off and running on your digital collaboration journey.

This playbook is a part of the
DESIGNING COLLABORATION PLAYBOOK SERIES

It is proudly brought to you by



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