Remote Team Performance and Growth Plan

This plan has been developed to lead a fully remote, cross-functional team on a high-impact project to improve new customer retention. The focus is on ensuring consistent results, accountability, and growth in a distributed environment.

Project Summary

Our company's key business priority is to improve **30-day new customer retention** by ensuring customers have a smooth and engaging onboarding experience with our productivity app. Currently, retention after 30 days is **65%**. The company's goal is to raise this to **80% by the end of Q4**.

We will achieve this by: - Tracking and analyzing customer behavior during onboarding. - Creating clear, helpful onboarding materials (emails, quick start guides, FAQs). - Providing consistent customer support and fixing drop-off points quickly.

I will lead a **seven-member team** consisting of: - Product Manager - UX Designer - Frontend Developer - Backend Developer - Customer Success Specialist - Data Analyst - Technical Writer

The UX Designer and Data Analyst are based in a different time zone (+4 hours), requiring structured handovers and strong async collaboration.

Task 1: Setting Clear Goals

Business Priority Goal: - Raise 30-day customer retention from 65% to 80% by the end of Q4.

Team Goal: - Deliver improved onboarding flow, content, and support systems that measurably increase customer retention and satisfaction by the end of Q4.

Individual Goals:

1. **Product Manager**: By end of Q2, define and maintain a prioritized onboarding improvement roadmap aligned with retention targets.
2. **UX Designer**: By end of Q3, deliver redesigned onboarding flow and prototypes addressing at least three top drop-off points.
3. **Frontend Developer**: By end of Q3, implement redesigned onboarding UI with zero critical bugs and >90% QA acceptance.
4. **Backend Developer**: By end of Q3, implement event tracking and onboarding triggers with 99% accuracy in data capture.
5. **Customer Success Specialist**: By Q4, reduce onboarding-related support tickets by 20% through improved responses and new FAQ materials.

6. **Data Analyst**: Starting Q2, deliver weekly reports including top 3 drop-off points and experiment outcomes with actionable insights.
7. **Technical Writer**: By end of Q3, deliver onboarding content package (3 onboarding emails, quick start guide, updated FAQ) and reduce documentation-related tickets by 20%.

Task 2: Assigning Responsibilities

We will use a **RACI matrix** to assign ownership clearly.

Task	Responsible	Accountable	Consulted	Informed
Map current onboarding journey	Data Analyst	Manager	UX Designer	All team
Identify top 3 drop-off points	Data Analyst	Manager	Product Manager, UX	All team
Redesign onboarding flow	UX Designer	Manager	Data Analyst, Product Manager	All team
Build onboarding UI	Frontend Dev	Manager	UX Designer	All team
Implement backend triggers	Backend Dev	Manager	Data Analyst	All team
Create onboarding content (emails, guide, FAQs)	Technical Writer	Manager	Customer Success	All team
Deliver customer support updates	Customer Success	Manager	Technical Writer	All team
Weekly retention reporting	Data Analyst	Manager	Product Manager	All team

Task 3: Tracking Progress

Activity 1: Key Metrics

Metric	Target
30-day retention rate	Increase from 65% → 80% by Q4
Documentation-related support tickets	Reduce by 20%
% weekly reports with top 3 drop-offs	100%
Onboarding content package delivery	Completed by end of Q3
Onboarding flow redesign	Implemented by end of Q3

Activity 2: Visibility Metrics - % of tasks delivered on time per sprint. - Number of onboarding experiments logged and tested. - Customer satisfaction (CSAT) scores on onboarding-related support interactions.

Activity 3: Check-ins, Team Norms, and Tools 1. Daily async check-ins in Slack (#project-retention) with Yesterday / Today / Blockers. 2. Weekly 60-min sync at overlap hours, recorded, with notes shared in Notion. 3. Clear handover notes from UX and Data Analyst (in +4 timezone) posted in Notion before developers' workday. 4. Tools: Notion (project/task tracking), Slack (communication), Figma (designs), Mode dashboards (analytics).

Activity 4: Escalation Path 1. Team member attempts solution → 1 hr. 2. Post in project Slack channel → peer help. 3. Escalate to relevant role lead (PM/UX/CS) → 2 hrs. 4. Escalate to Manager → immediate intervention.

Task 4: Providing Feedback

Feedback Framework: SBI-R (Situation, Behavior, Impact, Response).

Example: - **Situation:** During our weekly sync on August 15th, we reviewed onboarding experiment reports. - **Behavior:** The Data Analyst's report shared retention numbers but did not highlight the top 3 drop-off points. - **Impact:** The team struggled to prioritize fixes, delaying decision-making and sprint planning. - **Response:** I met with the Data Analyst 1:1 to clarify expectations and introduced a structured template to ensure all future reports include top drop-off points.

Feedback Practices: - Biweekly 1:1 check-ins with all team members. - Async feedback via comments in tools (Figma, Notion, Google Docs). - End-of-sprint retrospectives to share wins, challenges, and improvement actions. - Public recognition in Slack for major contributions and milestones.

Task 5: Supporting Learning and Development

Identified Learning Needs & Actions:

Trigger	Training Need	Training Format
Data accuracy issues	Improve clarity in analytics reporting	Mentoring + shared templates
New tracking tools	Confident use of new analytics/event tracking tools	Short video guides + peer training
Time-zone challenges	Improve async handovers between UX/Data Analyst and developers	Live workshop + shared checklist
Content clarity	Align support and technical content for customers	Cross-functional peer review

Trigger	Training Need	Training Format
Growth opportunities	Enable ownership of A/B testing experiments	On-the-job leadership assignments

Knowledge Sharing: - Document all learnings in Notion "Onboarding Playbook." - Maintain a "Retention Experiments Log" with results and insights. - Rotate experiment ownership to give each member professional growth opportunities.

Summary

This Remote Team Performance and Growth Plan ensures: - **Clear goals** for the project and each team member. - **Accountability** through a full RACI structure. - **Transparent progress tracking** using metrics, async check-ins, and shared tools. - **Constructive feedback loops** that support improvement and recognition. - **Learning and development** opportunities embedded in the project lifecycle.

By combining strong structure with remote-first practices, this team is positioned to deliver improved retention results and strengthen long-term collaboration.