# My Remote Team Performance and Growth Plan

This plan has been developed to lead a fully remote team on a high-impact project. The focus is on ensuring consistent results and accountability in a remote environment.

## Project summary

Our company’s key business priority is to improve customer retention by ensuring new customers have a smooth onboarding experience with our software.

My team’s goal is to increase new customer retention in the first 30 days from 65% to 80% by the end of Q4. Customer retention means how many new customers continue using our product after they first sign up, rather than dropping off quickly. We plan to achieve this by creating better support materials, such as onboarding content (e.g., emails, quick start guide, and FAQs), and tracking user behavior patterns. Currently, we receive an average of 100 documentation-related support tickets per month.

I’ve been chosen to lead this initiative, managing a seven-member team consisting of a Product Manager, User Experience Designer, Software Developers, Customer Success Specialist, Data Analyst, and a Technical Writer. All members work remotely from their preferred locations. The User Experience Designer and the Data Analyst are in a different time zone (4 hours ahead from the rest of us), requiring careful coordination for synchronous activities.

## Developing my plan, step by step

### Task 1: Setting clear goals

My first task is to set clear goals for the team as a whole and for the team members. In this plan, I’m focusing on two team members: the Data Analyst and the Technical Writer.

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| **Serial number** | **Goal type** | **Goal statement** |
| 1 | Business priority | Improve customer retention by ensuring new customers have a smooth onboarding experience with our software. |
| 2 | Team goal | Increase new customer retention in the first 30 days from 65% to 80% by the end of Q4. |
| 3 | Individual goals | **Data Analyst**:  Track new customer behavior during their first 30 days and include the top three drop-off points in weekly actionable reports until the end of Q4, contributing to the team goal of raising retention to 80%.  **Technical Writer**:  By the end of Q4, reduce documentation-related support tickets from the current average of 100 per month to 80 per month (a 20% reduction), thereby supporting the team goal of raising new customer retention to 80%. |

### Task 2: Assigning responsibilities

My next step is to make sure that each task in this initiative has a clear owner. I will use the RACI matrix to assign responsibilities to the Data Analyst and the Technical Writer.

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| **Serial number** | **Tasks** | **Responsible** | **Accountable** | **Consulted** | **Informed** |
| 1 | Map current customer onboarding journey | Data Analyst | Me (Manager) | Technical Writer | All Team Members |
| 2 | Develop new onboarding content (e.g., emails, quick start guide, FAQs) | Technical Writer | Me (Manager) | Data Analyst | All Team Members |
| 3 | Create progress reports on user onboarding metrics | Data Analyst | Me (Manager) | Technical Writer | All Team Members |

### Task 3: Tracking progress

Now that I’ve set clear goals (Task 1) and assigned responsibilities (Task 2), the next step is making sure the team stays on track.

#### Activity 1: Key metrics

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| **Serial number** | **Metric** | **Target** |
| 1 | 30-day customer retention rate | Increase from 65% to 80% by the end of Q4 |
| 2 | Number of support tickets related to documentation | Reduce by 20% by the end of Q4 |
| 3 | % of weekly reports that include top 3 customer drop-off points (Data Analyst) | 100% of weekly reports include top 3 drop-offs |

#### Activity 2: Visibility metrics

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| **Serial number** | **Metric** |
| 1 | % of weekly reports that include top 3 customer drop-off points (Data Analyst) |
| 2 | Average number of documentation-related support tickets per week (Technical Writer) |
| 3 | Number of planned onboarding assets (3 emails, 1 quick start guide, 1 FAQ) published and accessible (Technical Writer) |

#### Activity 3: Check-ins, team norms, and tools

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| **Serial number** | **Actions** |
| 1 | Daily asynchronous check-ins (e.g., via Slack/MS Teams channel) where each team member shares top priority for the day and any blockers. |
| 2 | Weekly 45-minute video sync meeting (recorded) to review progress against goals, discuss challenges, and align on next steps. Key decisions and action items are documented and shared. |
| 3 | Establish clear guidelines for communication and response times across different time zones, particularly for asynchronous updates. This includes defining preferred communication channels for urgent matters and identifying periods of overlap for synchronous discussions when necessary. |

#### Activity 4: Escalation path

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| **Levels** | **Actions** |
| 1 | Team member attempts to resolve issue for up to 1 hour. If stuck, they post in the dedicated project Slack channel for peer support. |
| 2 | If no resolution within 2 hours, the team member escalates to the Product Manager |
| 3 | If the issue is still unresolved within 4 hours, it is escalated to me (the Manager) for immediate intervention and cross-functional coordination. |

### Task 4: Providing feedback

During our second weekly review meeting on April 25th, the team noticed that one of the email design tasks was marked as “done” in the progress tracker, but the actual draft files weren’t uploaded to the shared folder. This created confusion for the reviewer and led to a delay in the review process. To address this, I scheduled a one-on-one with the technical writer who owned the task. I used the SBI-R framework to convey feedback.

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| **Serial number** | **SBI-R** | **Response** |
| 1 | Situation | While reviewing the onboarding email sequence tasks during our second weekly review meeting on April 25th…. |
| 2 | Behavior | ..you marked your design task as complete in the tracker, but the draft email templates weren’t uploaded to the shared folder. |
| 3 | Impact | This confused the reviewer, who assumed the templates were ready for review. Their work was delayed, and the team missed a deadline. |
| 4 | Response | What made you feel the task was ready to mark as complete, and what would help you ensure the files are uploaded before that step next time? |

### Task 5: Supporting learning and development

During the last sprint, I noticed three different types of learning needs in the team:

**Performance issue**: The Data Analyst’s weekly reports lacked clarity and often missed highlighting the top 3 drop-off points, which slowed down decision-making.

**New tool**: A new analytics tool was introduced for reporting.

**Collaboration challenge**: Because of time-zone differences, handovers between the Data Analyst and Technical Writer were sometimes unclear.

To address these gaps, I created a targeted learning and development plan.

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| **Serial number** | **Trigger** | **Training need** | **Training format** |
| 1 | Performance issue | Improve reporting clarity for the Data Analyst to include required information (top 3 drop-offs) in weekly reporting | Mentoring + Guides |
| 2 | New tool | Ensure confident use of the tool for faster and more accurate reporting | Short videos + Guides |
| 3 | Collaboration challenge | Reinforce key aspects of the handover process to improve handovers between the Data Analyst and the Technical Writer | Live virtual workshop + Mentoring |