# 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 |
| 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.