**Coaching From a Distance**

In a virtual environment there are additional challenges that leaders face when coaching team members:

* Need to address issues relevant for virtual workers such as isolation or work/life balance due to time zone challenges. Further, these issues are unique to a virtual setting and might go undetected for a long time, resulting in negative outcomes such as decreased productivity and engagement.
* Due to the lack of visual cues, active listening skills become even more essential.
  + Many of the media used for virtual collaboration do not provide visual and auditory cues, and as a result, you may misinterpret messages. Therefore, it becomes even more important for a team leader to consistently use paraphrasing, empathizing and responding to others in a balanced way.
* There may be fewer opportunities to “observe” performance and deliver feedback in a timely manner, which can lead to a lack of clarity regarding expectations and performance standards.
  + Some communication channels might distort the tone or understanding of your message. Research has found that there is a negativity bias in the perception of the email tone: emails perceived to be neutral by the sender were often perceived as negative by the recipients; emails perceived by senders to be positive in tone were only considered to be neutral by recipients.

**Four Principles of Virtual Coaching**

1. Balance a focus on task and relationships
2. Don’t make assumptions – provide context and more detail; ask specific questions to make up for the lack of visual cues
3. Encourage the other person to respond; ask the person to restate what they heard
4. Increase the use of active listening to confirm understanding to build trust

**Remote Coaching Exercise**

**Case Study #1**

Gene is a member of your virtual team. He is a likeable and knowledgeable person who does great work; however, he seldom meets critical deadlines. He is a perfectionist and spends a great deal of time analyzing data/issues before drawing conclusions/trends. This causes delays and tremendous problems on the team. Gene missed an important deadline for a report to the vice president on Tuesday, and another on Friday. He is well respected among the team for his expertise and quality of work, but his inability to hit target dates is starting to prevent the team from meeting its goals.

From what you know of him, Gene’s motto is “Anything worth doing is worth doing right.” Gene believes it’s better for something to be a little late and correct than on time or early and be loaded with mistakes and inaccuracies. He also thinks that deadlines are useful for planning purposes, but are flexible and not intended to be carved in stone. In addition, he’s used to working independently and works best at his own pace.

Gene hardly talks with you except on scheduled team calls. Gene mentioned to other team members that it seems to him that you don’t really understand the pressure he feels to get things right or why he needs to work the way he does. It seems to him that for you the deadline is top priority and quality takes a back seat.

You’re about to have a video conference with Gene to discuss the missed deadlines.

**Discussion Questions**

* What are your objectives for this coaching conversation?
* How would you adapt your approach for a virtual setting?

**Case Study #2**

Sean, a team member who has been on the team for two years, has made several negative comments about how much work the team continues to take on when it is already working at full capacity. Sean has never made any of these comments to you directly, but you have heard about them from several team members. You are worried that his negativity might impede the team’s success.

From what you heard from others, Sean thinks that the current pace cannot be sustained and the team’s willingness to continue to take on more work will create a drop in productivity and quality. He also expressed concerns that everyone else seems to be accepting the situation and taking on the additional assignments. From Sean’s point of view unless someone says something, the problem will only get worse.

You have scheduled a phone call to discuss Sean’s comments about the workload.

**Discussion Questions**

* What are your objectives for this coaching conversation?
* How would you adapt your approach for a virtual setting?

**What it Means to Be Accountable**

A common view of being accountable is that it is admitting mistakes or, more often, determining whose fault it is when performance declines, problems develop, or results are not delivered. This, however, is only one aspect of what it means to take accountability. In addition to accepting responsibility for their actions and not blaming others, people who are accountable take the initiative to ensure problems get solved and projects are completed on time – even when the problems are not their fault.

Being accountable means that:

* We take initiative
* We accept responsibility for our actions
* We accept responsibility for how our actions impact others
* We admit when we make mistakes
* No excuses. No blaming

**Leading From a Distance Simulation: David Missing Deadlines**

Through your efforts to understand the reasons for the team’s performance plateau, it has come to your attention that David has been consistently missing deadlines. He recently missed two important deadlines which caused a delay in a product release.

David’s performance is negatively impacting the team and you need to take action. However, because David does not report directly to you, managing this may be difficult. David’s Manager is Pamela Jones, your colleague.

**How Would You Handle It?**

1. Call Pamela Jones, David’s boss, to explain the issue with David’s performance and explore what she can do to help enhance his accountability.
2. Send David an email to ensure that he understands the impact of missed deadlines on the team and its customers.
3. Ask David what he will do to get the projects back on track, what he will do to keep from missing deadlines in the future, and what he might have done that contributed to the problem.
4. Clarify your expectations for David’s performance and for his current projects agree on periodic check points when you and he will discuss progress and anticipate potential problems.
5. Hold a team v-meeting to discuss the importance of meeting deadlines and identify solutions to existing barriers that are getting in the way.

**Best Practices for Accountability and Remote Coaching**

* Leverage technology to track progress on assignments (e.g., shared sites and project management sites)
* Use meaningful metrics that connect individual contributions to team goals
* Ensure transparency in individual tasks and goals and project status
* Periodically collect feedback from stakeholders to assess the team’s level of performance
* Use checkpoints as “coachable moments” for “course correction” and as an opportunity to build trust
* Reinforce positive behavior and address below standard performance in a timely manner
* Be aware that virtual workers face unique challenges (e.g., isolation, use of technology, time zone differences, work/life balance)
* Establish formal processes to monitor individual and team performance
* Periodically work flexible hours so you can be available when team members are working
* Find a mentor/partner at employee’s location who can be a resource
* Make regular and impromptu contact with team members
* Face-to-face is best, then video and then the phone – use email to summarize conversations
* Make it a consultative problem-solving discussion – maintain the other person’s self-esteem
* Pay attention to tone of voice and inflection
* Don’t assume – provide context and more detail
* Ask specific questions to make up for the lack of visual cues
* Encourage the other person to respond – ask for a verbal response
* Ask the person to restate what they heard
* Increase your use of paraphrasing and empathizing to confirm understanding and build relationships

**Managing Accountability Remotely: Self-Assessment**

Think about your direct reports or virtual team members, and using the rating scale below, indicate the extent to which you agree with the following statements.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **1**  **Strongly Disagree** | **2**  **Disagree** | **3**  **Neither Agree, nor Disagree** | **4**  **Agree** | **5**  **Strongly Agree** |

|  |  |
| --- | --- |
| **SECTION 1: SET VIRTUAL TEAM Members UP FOR SUCCESS** | **RATING** |
| 1. Decisions are made by the team member closest to the problem/issue |  |
| 1. Team members have autonomy to organize their work |  |
| 1. Metrics are results-oriented rather than process-oriented (i.e., goals emphasize output rather than activity such as the number of hours worked) |  |
| 1. Team members are appropriately involved in planning work and defining milestones |  |
| 1. Team members are regularly updated on changes so they can plan work as priorities shift |  |
| 1. A shared website, collaborative software or similar tools are available to all team members to help coordinate work (i.e., schedule meetings, assign tasks, set deadlines) |  |
| 1. A method to store and access team documents and communications is available to all team members |  |
| **SECTION 1 SCORE** |  |
| **Section 2: Sustain Momentum** |  |
| 1. Individual commitments and accountabilities are visible and transparent (i.e., everyone on the team is aware of who is responsible for what and by when) |  |
| 1. The team uses meaningful metrics that clearly connect individual contributions to team or organizational goals |  |
| 1. We effectively recognize team members who demonstrate outstanding behaviors (e.g., during v-meetings, send e-recognition cards) |  |
| 1. Team members proactively check in with colleagues to offer support |  |
| 1. Despite being geographically distributed, team members find effective ways to raise issues that may impact shared deliverables |  |
| 1. Team members make themselves available to others beyond “core business hours” to help deal with differences in time zones |  |
| 1. Team members receive regular feedback/coaching to help them understand what they do well and what they could improve |  |
| **SECTION 2 SCORE** |  |

**Calculate your score for each of the sections and write each total in the designated row.**

**Interpreting your Scores**

|  |  |  |
| --- | --- | --- |
| **Section 1.** | **If your score on section 1 was between 7-21:** | **If your score on section 1 was between 22-35:** |
| **Set team members up for success** | The foundation may not be in place to enable the members of your virtual team to act with high levels of responsibility and accountability. Team members may not receive sufficient guidance and/or may lack authority to make decisions on their own. In addition, you may also miss opportunities to leverage technology to coordinate work. As such, you may benefit from:   * Focusing on team deliverables/goals rather than when and where people work * Keeping team members informed to prevent them from feeling isolated * Involving team members early in discussing the timelines and setting checkpoints * Looking for tools that would help you facilitate assigning tasks and monitoring task/project completion * Ensuring team communications are captured and easily accessible | It is likely that the members of your team have been set up for success and a platform is in place the enables them to take accountability for their actions.  The members of your team seem to have the autonomy to make decisions, expectations for deliverables and due dates are likely clear, and your team seems to have an effective process in place to coordinate work and keep people informed. |
| **Section 2.** | **If your score on section 2 was between 7-21:** | **If your score on section 2 was between 22-35:** |
| **Sustain momentum** | Commitments may be missed and conflicts may arise due to misunderstandings about expectations and people’s accountabilities. This may be caused by a lack of face-to-face contact and distance as well as the lack of an effective process for team members to troubleshoot issues and find solutions. Your team might benefit from:   * Using technology to ensure transparency and visibility * Proactively checking if team members need help * Seeking and offering constructive feedback on ways to improve team performance * Going beyond email to check-in with team members and address problems | Your team appears to have effective process in place to raise issues and potential problems as well as monitor performance.  Your team seems to effectively use web-based technology to monitor progress on assignments, which helps ensure transparency and accountability.  The members of your team also seem to use strategies to offset the geographic distance and time differences and help one other deliver on their commitments. |

**Interpreting Your Results**

For any items you scored a **2 or lower** reflect on what prevents this practice from being used consistently in your team and what you could do to address these issues.

Identify items where you scored a **3** and consider how you might implement practices to improve in these areas.

* What you are currently doing well to set people up for success and maintain momentum?
* What you could do differently or better – where are the gaps?
* What actions can you take to enhance the level of accountability among your team?