Coronavirus Guidance:

Tips to Prepare Your Association Technically and Mentally for Virtual Work

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INTRODUCTION

In accordance with recommendations issued by the United States Centers for Disease Control (CDC), your organization has decided to allow your team to work remotely, but you may be wondering where to start that transitioning process. Having taken associations from on-premise to virtual as a part of my consultancy, I have been asked by several of my on-premise clients for assistance in making the transition to virtual during this time. I recently posted a blog giving a quick general overview of things to consider when moving your operations from on-premise to remote. This eBook is a more extensive guide, a companion, to that original piece. While the transition to remote work has come quickly for many organizations, the following are recommendations designed to help you transition smoothly to this temporary new "normal" mode of operations.

Successful Virtual Teams:
- Use technology to promote transparency, collaboration, and communication.

- Focus on managing performance.

- Have a formal onboarding process.

Leaders within the Organization:
- Invest in the right tools, trainers, and practices.

- Model collaborative behavior and make highly visible actions.

- Provide mentoring and coaching especially on an informal basis to foster growth on individual and team basis.

It's a Technical and Mental Game
Pragmatically, most people understand that technical needs will need to be met, but your organization's "mental" needs are equally important. To successfully implement a virtual environment, you need to be aware of the unique mindset involved in managing this way. For example, not everyone has or is comfortable working from home, so it is management's responsibility to help people become comfortable with their virtual workplace. By being prepared both technically and mentally, you can help ensure a smooth transition to virtual work.

Preparing Your Technology and Protocols

The first thing your organization needs to consider is what technological needs it has and what protocols need to be established. The following outlines specific guidelines to help you stay on track.

Access to Files
- If files are in the cloud, have your team test out access from remote locations.

- If you still rely on VPN, make sure you have enough licenses, and check your bandwidth at the office to make sure it's sufficient OR educate users that if everyone is logging into VPN at once, there will be a slow down!

- If you cannot supply your staff with laptops to take home and require that they use personal devices for work, then you should institute a temporary policy making sure that your MSP or IT department scan for viruses, malware, and up-to-date patching BEFORE connecting to your network.

Access to Phones
Because telephone coverage can be critical to organizations, the following are the minimum requirements for organizations to institute during this time:
- If your phone system allows for voicemails to also be accessed or viewed via email, then be sure to have that functionality activated, and check with all your team members to be sure that they can access/view them.
  - If this service isn't available, make sure your team knows how to access their voicemail remotely.

- Some phone systems are more sophisticated, but if your phone system has limited options, at least make sure your phones are forwarded and have a standard outgoing message.

Access to Colleagues/Collaboration
It is also critical to establish an informal communication channel for asynchronous communication.
- My recommendation is Slack, Teams, or Zoom.

- Establish a protocol that all users be logged in while they are working.

- Agree upon using statuses – be sure to signal when you are and are not available. Most platforms show **Green** = Available; **Yellow** = Inactive; and **Red** = Busy.

- Create "channels" (this is the term Slack and Teams both use) for group communications. I would recommend setting up a channel per department and one potentially for organization-wide communication.

- o Also consider setting up a channel for lighter communication and conversations so people feel connected on a social/personal level.

- Don't go overboard.
  - o If you have never used Slack or Teams, keep it simple. Use it only for calls, channels, and 1:1 messages.

- Establish a process for sending and storing files. This is critical for multiple reasons:
  - o Data leakage/Risk/Privacy – if your organization didn't have computers for all the staff to take home but are allowing them to use personal devices, they should NOT be storing files on their personal machines.

  - o Efficiency - The introduction of these tools (if never used before) could cause some confusion with document versions. Having clarity on where files will be stored helps increase overall business continuity.

Video Conference Protocols

I know most of us have been participating in video conferences for years. When you participate in the occasional video conference, you can tolerate a poor call, but when doing this day in and day out - for hours - do the following:
- Use a headset.
  - o It has much better sound quality than simply using the speaker function on your phone. Speaker phones can also produce feedback and have poor sound quality on the other end of the line.

  - o People tend to "yell" when they are using a speaker phone. This is not the tone of voice you generally want on a call, particularly when you are using it a lot.

- Mute your phone when you are not talking.

- Use your camera.
  - o Remember much of our communication is non-verbal, so everyone will increase the effectiveness of their communications if the rest of the team can see them.

- If you don't want to show your house, blur your background or use a virtual background.

- Share your screen when taking notes – this promotes transparency.

- Do NOT multi-task during the meeting. I can't stress this enough. Not only is it rude, it doesn't facilitate effective meetings.

- Arrive early if you want to provide some time for socialization/free flowing conversation prior to the meeting.

Set Overall Communication Protocols and Expectations
Once you have the tools in place, you want to make sure there are protocols in place for using the tools. Here is a list of best practices:
- Use email for external and formal communication only.

- Casual communication should take place in other tools (Slack, Teams, Zoom).

- Use informal "channels" within the tools for on-going communication and team activities.

- Use "direct messages" within the tools for 1:1 communication and direct requests.

- Set expected response time for email and direct messages. Some examples:
  - Email responses 1 business day
  - Internal direct message – end of business day

- Set expectations around off-hours communications.
  - Just because someone is online doesn't mean there should be an expectation of an immediate response.

- Do not forget that you have a phone to facilitate longer conversations.
  - If an email or channel chat goes on for an extended period, call a meeting and get on a video conference.

  - The written word is often the least effective form of communication, so use video conferences to confirm interpretations and clarify expectations.

Connecting to a Second Monitor

Many users are accustomed to using multiple or at least larger monitors in the office. You can connect a monitor directly into your computer using the HDMI port.

To use a monitor with your laptop, you need two cords:
1. A power cord

2. A connector cord to your laptop

There are three connection options on the back of you monitor: HDMI, DVI and Display Port.

HDMI	DVI	Display Port

- If the connection to the monitor is via HDMI, use an HDMI to HDMI connector.

- If the connection to the monitor is via DVI, use a DVI to HDMI connector.

- If the connection to the monitor is via, Display Port, one of the other two types of connections should be available, and you should use the appropriate cable.

The connectors are inexpensive - generally under $10. Links to connectors via Amazon are below.
- HDMI to HDMI connector

- DVI to HDMI connector

Electronic Signatures

If you haven't already adopted the practice of using electronic signatures, now is a good time to begin using electronic signature software, particularly if you frequently administer a variety of contracts or agreements. If you own Adobe DC Pro then Adobe Sign comes with the tool. Other options are:
- DocuSign

- PandaDoc

- HelloSign

- Formstack – for building forms and for signatures.

Other Considerations and Costs

Not knowing how long the need for social distancing and remote work will last, there may be some additional cost considerations for which you hadn't originally budgeted.

Home Office Reimbursement

High Speed Internet: For high-speed internet, prices vary throughout the country, but the average cost is about $50.00 per month for about 100 Mbps of speed.

Headset: I personally prefer headsets that go over one ear instead of both, but this is purely a personal preference. Similar to the speaker phone, I found that I tend to talk much louder if both ears are covered. That said, if you are working in a noisy home, covering both ears may be a perfect fit. There are also options with Bluetooth, but you have to make sure these are charged properly and within range. Bluetooth tends to be the most temperamental and expensive of all the headset options.

When using a headset, be aware of the placement of the microphone. Some are quite sensitive and can pick up every breath you take. Ask a trusted colleague to help you adjust your settings. Options for costs range from $25 - $100 depending on the features: Some popular options include:

- [Single Ear](#)

- [Single Ear](#)

- [Full Headset](#)

- [Full Headset](#)

- [One Ear – Bluetooth](#)

Managers' Expectations

Managers frequently ask me, "*How do I know work is getting done at home? How can I manage a team that isn't together in the same building?*" The answer is to stop focusing on time and start focusing on outcomes. You will not be able to control how your team is using their time. It is better to concentrate on what their expected deliverables will be and when you need to receive them. You may be surprised in some of your team's ability to be more efficient in their work output while working from home. In fact, studies have shown that many introverts really shine in a remote environment because they generally prefer scheduled versus impromptu meetings, tend to work better individually, prefer to complete one task at a time, and thrive within focused conversations.

Take these steps the first week to help you begin to adjust to this shift in management:
- Touch base with each team member individually. When you do, you should:
  - Give very clear directives on the work they are doing and their expected deliverables over the next few weeks.
    - Write these down or use a tool to capture expected outcomes to ensure everyone is on the same page, and to track progress.

- - - Get a sense of what your team's home work environment is going to be.
  - Some team members may not have ideal working conditions at home. It's important as a manager to understand their obstacles and opportunities so you can see how to support them.

- Establish a regular team meeting.

- Depending on the size of the team, a quick 15-minute team call at the beginning of the day is a great way to kick off the day. Use this call to succinctly summarize:
  - What was accomplished yesterday.

  - What's on the plate for today.

  - Identify any obstacles with which team members may need assistance.

Moving forward, continue to pick up the phone and call team members. It would be ideal if you can have a conversation with each team member once a week, but depending on the size of your team, this may not be practical.

NOTE: one of the biggest challenges of working from home is actually turning work off!

Preparing a Workspace at Home

After preparing your technology and protocols, take some time to prepare your team members for the shift in their mindset of work from office to home. The following tips can help ease the transition and increase productivity.

- Deliberately "set up a space" designated for work.
  - Encourage your team members to find a space at home that is comfortable and quiet.

- Try to avoid the kitchen table as a workspace, if you can.
  - It is important to create some physical separation in your workspace from your "home" space.

- Set expected work hours. Routine is important.
  - Act like it is any normal workday - get up, get dressed, and go to work!

- For your calls, use a headset.
  - Your family doesn't want to listen to your conference calls throughout the day.

- If you have family home with you, set a boundary so they know when you can and cannot be interrupted.
  - Consider making signs like "On a call" or "Do not disturb."

- o It is natural for kids to think you are available all the time while at home, so be clear when you can and cannot be interrupted.

- Don't "sit" at your computer all day.
    - o Get up, walk around, go for a walk. Make sure to move around.

- If possible, connect your laptop to a secondary monitor.
    - o Not only will your eyes thank you, but it is helpful to have email and your informal communications channels open and available on one screen while "working" on the second. (Personal tip: To limit interruptions throughout the day, I TURN OFF the sound for email notifications and chat.)

- Eat healthy.
    - o It is an easy temptation to grab a quick salty and/or sweet snack instead of eating a healthy meal. Avoid the temptation, you'll be happy you did.

On-Boarding of a New Team Member

When bringing a new team member into a remote workplace, it is critical you build trust quickly. Studies show trust is established more rapidly in virtual teams by increasing the frequency of communication.

To ensure new staff members quickly establish trust and productive working relationships with their new team members, consider adopting a formal onboarding process similar to the following:

- Meetings
    - o On the first day - 1:1 Meeting with Manager.

    - o Brief 15-minute touch base meetings with the new Manager each day for the first two weeks.

    - o Group meeting with new department/team within the first few days.

    - o In-depth 1:1 meetings with new department team members within the first week.

    - o Other 1:1 meetings as required.

- Tech Tools Training
    - o Overview and training on all collaboration tools. Within the first week the session should include "how" the department leverages the tool(s)

    - o Review of policies and protocols

- If they are setting up a company computer in their home for the first time, conduct a help desk introductory session to:

- Establish a working relationship with the new staff member

- Inform the staff member of the help desk protocols (including documented support hours, contact information and SLA's)

- Provide an overview of the file repository

In addition to the aforementioned tips, consider establishing a "buddy" program. The "buddy" program pairs an established staff member from a different department with the new staff member. The purpose of this program is to allow the new staff member a "safe place" to ask a question, get advice and to gain a better understanding of the organization outside of their specific department. Organizational awareness and building trust throughout the organization is another key benefit.

INFORMAL COMMUNICATION TIPS

Getting Started

Using Slack or Teams can quickly improve team communication and workflow. Whether you and your team are already working in the office or remotely, here are some tips to get you started fast and effectively.

- **Adopt it today**. Make the adjustment away from internal email to Slack or Teams for most internal discussions. Consider using this response to most emails: "I got your email. Let's pick up the conversation on Slack [or Teams]. Thanks!"

- **Keep it direct.** Use your email prefix as your username (e.g., jdoe). The idea is to have a one-name identifier. You can add your full name to your profile along with your photo.

- **Keep it tight.** Only send messages relevant to the channel you are posting on. Ask yourself, "*Does everyone on the channel need to know about my message?*" before you post it. Conversations in Slack or Teams are about coming to decisions quickly or efficiently notifying a channel about a status or update (e.g.: publication or program, new tool that just came out, etc.). Management will use discretion regarding the platform to announce organization-wide information ranging from basic company news to changes in policy. Communication via either platform is considered official.

- **Keep it focused**. Establish channels that align with the way your business is structured (by department, group, function, etc.). Adding additional channels can equal adding noise, unless the channel has longevity. For a specific project you can add a channel, pull in Slack or Teams members and then archive the channel once the discussion is finished. *Please note: Inactive channels should be archived or deleted*.

- **Keep it central.** Start migrating all the relevant conversations, files, action plans, and decisions into Slack/Teams. It's all searchable so if you start using it almost exclusively, you'll have access to most of the key elements of our business within a few clicks and taps.

Be Direct

Slack or Teams' channels can get chaotic when there are a dozen people or more chatting. Sometimes there are so many sentences flying around it's easy to lose track of what question or query is directed at whom. That's why it's good Slack or Teams etiquette to call people by name in every message when speaking to them in a public channel. Saying *"@Michael, can you do this?" "@Michael, here is more information,"* or *"Thanks @Michael,"* directs each statement you type to the appropriate person, so it is always clear who the message's intended recipient is. Ask hourly staff to set their "Do Not Disturb" aligned to the end/start of the usual business day (i.e., Do Not Disturb from 4:30 p.m. to 8:00 a.m.).

Know the Difference Between @here and @channel in Slack

Slack also supports @mentions for individuals and groups. They are a great way to get people's attention—just don't abuse or misuse them, or you could annoy your teammates. The @here command lets you grab the attention of team members in a channel who are currently active. The @channel command, on the other hand, will send a message to all team members of the channel, whether they are currently signed in and active or not.

Obviously, the @channel command is great for emergencies or major channel-wide announcements, but use it for only those instances, as doing so will send push and email notifications to everyone in the channel—including people who may be off work for the day or on vacation. For non-urgent announcements, @here is always best.

Setting & Maintaining Do Not Disturb Hours in Slack

Slack lets users control when they receive desktop and mobile notifications **allowing for a daily, recurring Do Not Disturb** period when no alerts pass through. This can help people tune out of communications outside work hours and can be especially useful for a team that has people who work different hours or are spread across time zones.

An admin will set a global default "Do Not Disturb" period that individual members can override. Everyone in a team is alerted when the policy is set, and individual preferences are reset whenever an admin changes the time range. The hours set are always interpreted within the member's time zone. (This option is found in the web app under Team Settings in the Settings tab.)

When you are gone for the day, select "Set yourself to away" in settings.

During the workday, select a status from the following five options to denote your availability and what best describes when you may be expected back:

- **Out – Using Flex Time** - When you expect to be away for more than an hour but less than the entire day. It can be implied that the person trying to communicate with you should defer to email or voicemail.

- **Out to Lunch** - For time you will be away for an hour or less.

- **Out Sick** - In this case, it is understood that you'd like your privacy. Co-workers should defer to email if status is marked, "out sick."

- **On Vacation** - Users should defer to sending email messages in this case.

- **In Meeting/Intense Task** - This is for times when you are in a long meeting or series of meetings or in the middle of a task requiring no interruptions. Users should defer to email or voicemail when you have this status marked.

Check Recent Mentions in Slack

Opening "Recent Mentions" in the Flex Pane menu will give you one tidy list of every time someone has mentioned your name or one of your highlight words. Click recent ones to jump straight to the right point in the right conversation.

Channels

Slack: Channels should be closely aligned to your teams by function or projects. This is purposefully done to minimize noise created by multiple team members being part of multiple channels. It creates a structure where we are tightly aligned but loosely coupled (i.e.: If you want to know what another team is working on, you can quickly take a look at their channel). While existing topic-focused channels may be needed, limit creating topic focused channels because this creates more noise.

Microsoft Teams: In Teams, this is a two-layer structure. The "team" is a group of people and channels are topics/projects within the team. Consider creating "teams" based on department or a group that works together regularly.

Channel Tips

- Keep conversations focused: Organize channels by team (#marketing-team), campaigns and feature launches (#LAUNCH-2021 or #feat-website), and function (#editingGROUP or #marketing-announcements). Start with a few and add more as you go.

- Name channels in a predictable way so they are easier to look up and find, like an index. Prefixes help!

- Keep tabs on conversations by starring important channels so that they're pinned to the top of your sidebar.

ENABLING MICROSOFT TEAMS

The following instructions are for launching the Microsoft Teams application and making the necessary changes to ensure the application runs at startup and will stay active once the application is minimized. Teams is part of the Office 365 suite of apps. Check with your IT administrator to make sure your organization's Microsoft license enables you to launch the app.

- To launch the application, click on the search icon in the task bar.

- In the window that opens, type in TEAMS in the search bar.

- It should bring up the icon for TEAMS, and you can click that to launch the application.
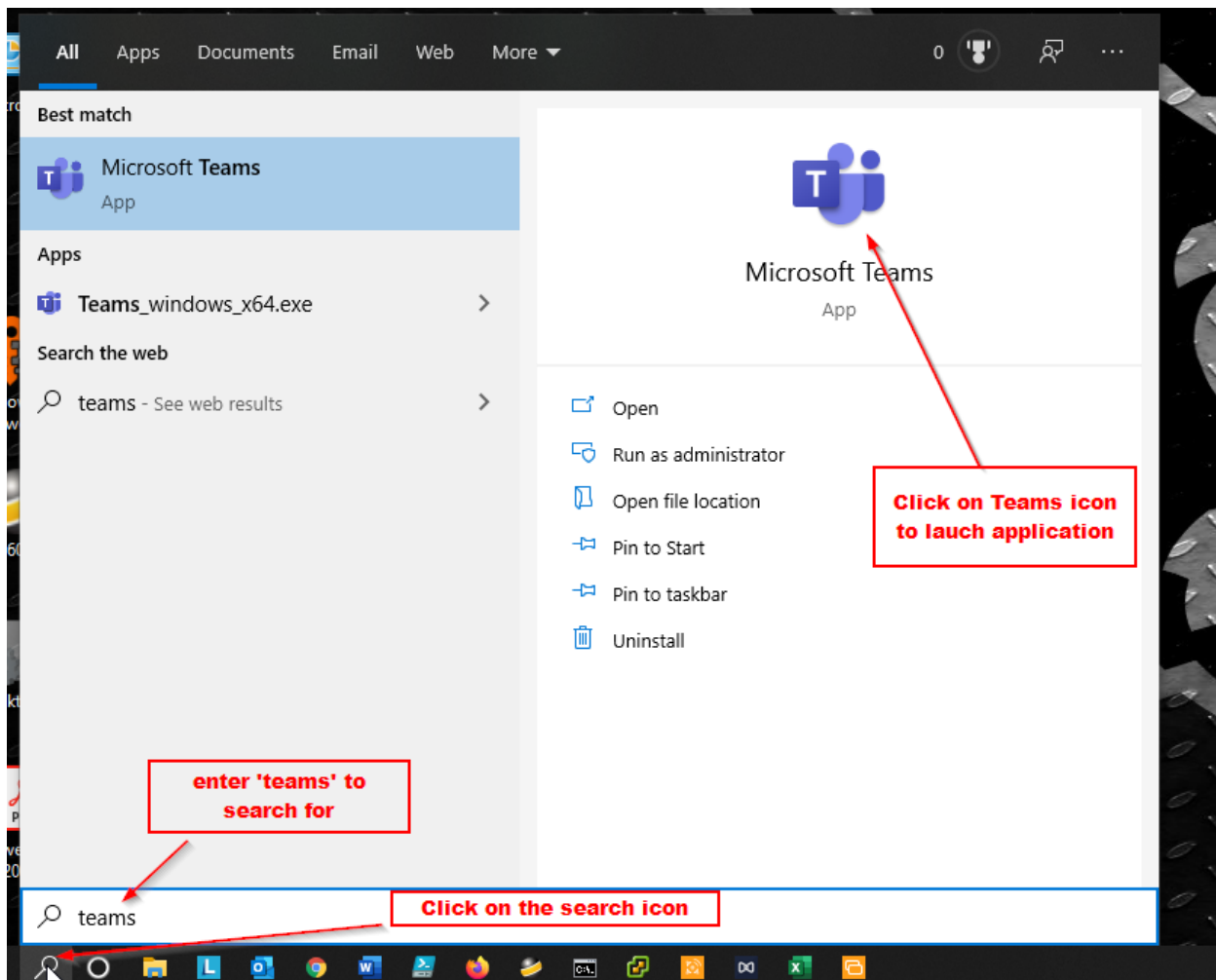
Adjusting Settings within the Application

Once inside the application, you will want to click on your account icon in the top right corner, and then click on Settings from the drop-down menu.
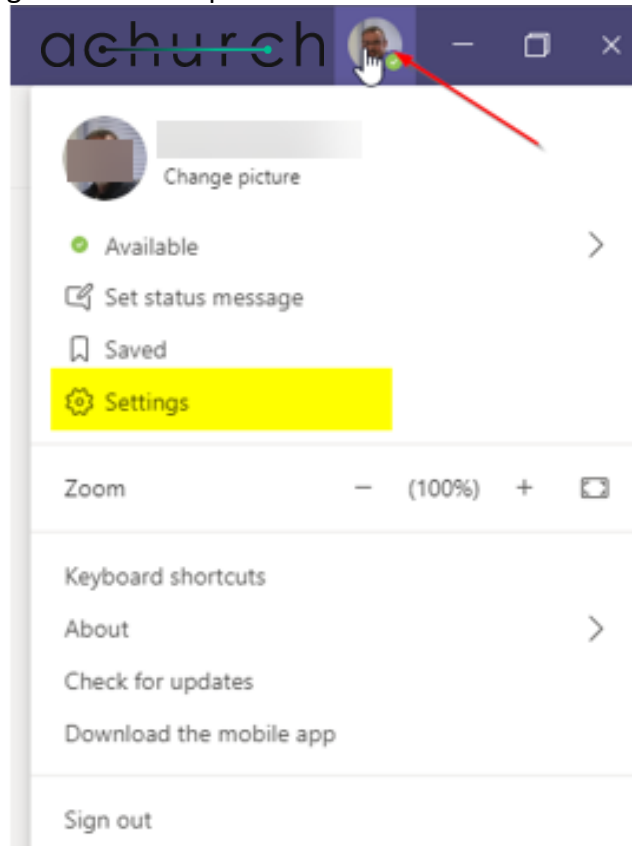
In the window that opens, ensure that the options for "Auto Start," and "On Close" are checked.
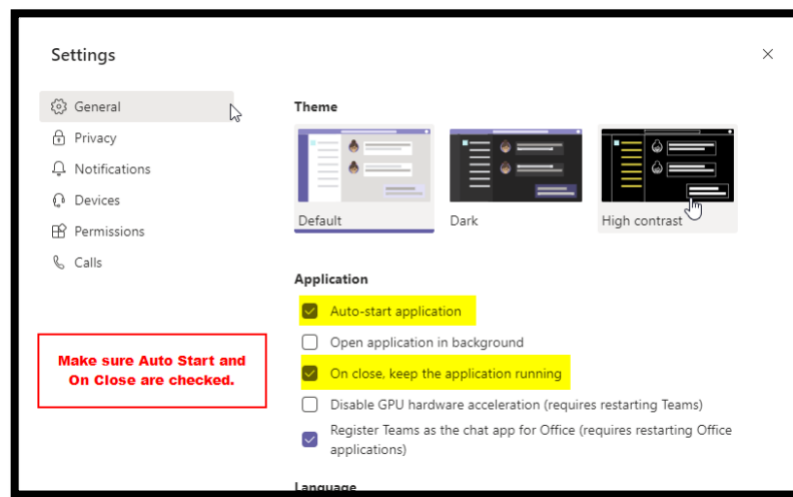
USING MICROSOFT TEAMS

Some of you have already started using Microsoft Teams, but for those of you who are new, we'll start with some basics.

Microsoft Teams is designed as a fully integrated collaboration platform for Microsoft. It allows users to communicate in real-time and asynchronously. Microsoft is sunsetting Skype for Business in 2021, so now is a great time to get accustomed to using this tool.

The platform includes:
1) 1:1 Chats

2) Group conversations via channels within a "team"

3) Integrated phone and video calls

4) Screen sharing

5) File sharing and collaboration

If you are not already using OneDrive and SharePoint, we recommend using this platform for items 1 – 4 above and continuing to use your current document storage methodology. Microsoft Teams also has a mobile app. Search for Microsoft Teams in either app store:
- Apple iOS

- Android

In terms of training, we'll start with the desktop application. Once you've installed the app, here are some quick tips and tricks.

General Navigation

Take a minute to review the Teams workspace -
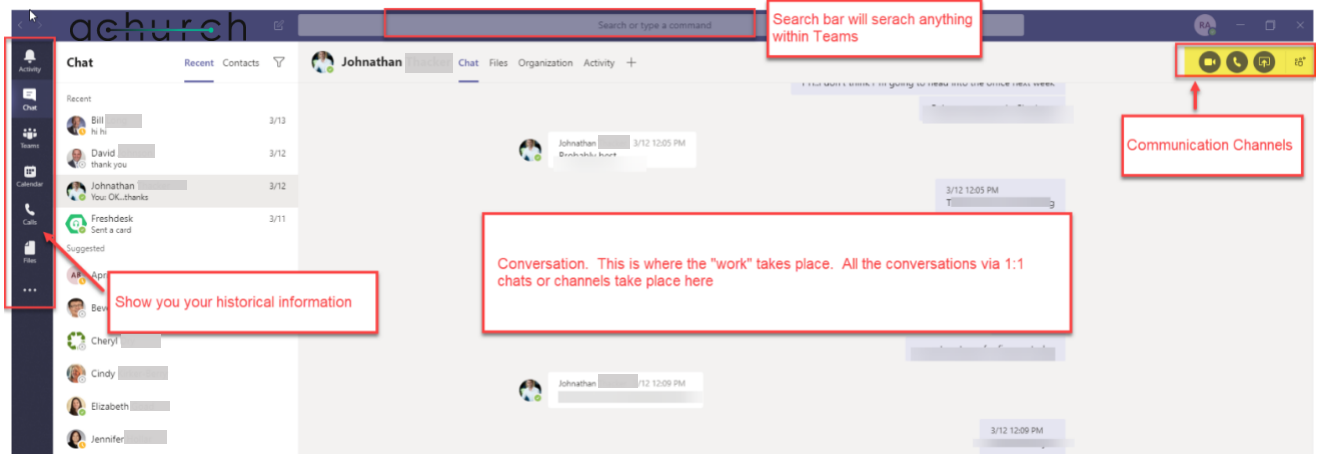
Communication Channels
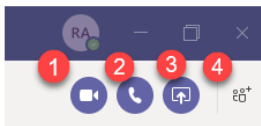
1. Make a video call
2. Make a phone call
3. Share your screen
4. Add a colleague to the call or video conference

Chat and Favorites

The chat functionality is for 1:1 conversations.
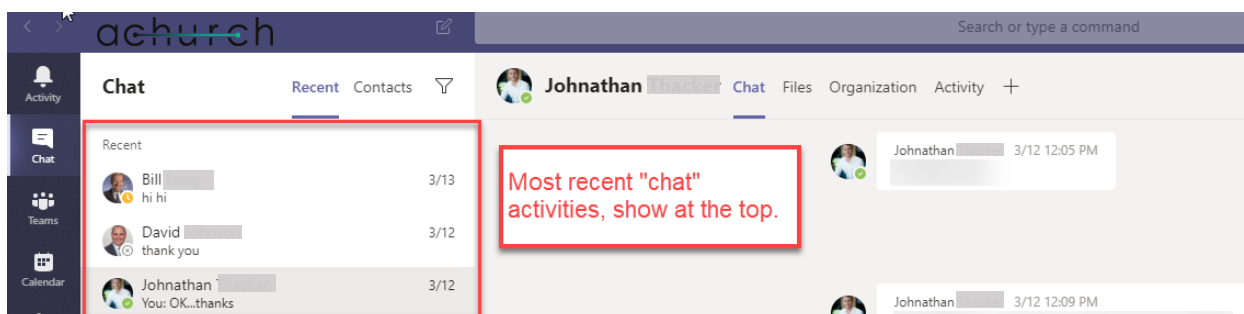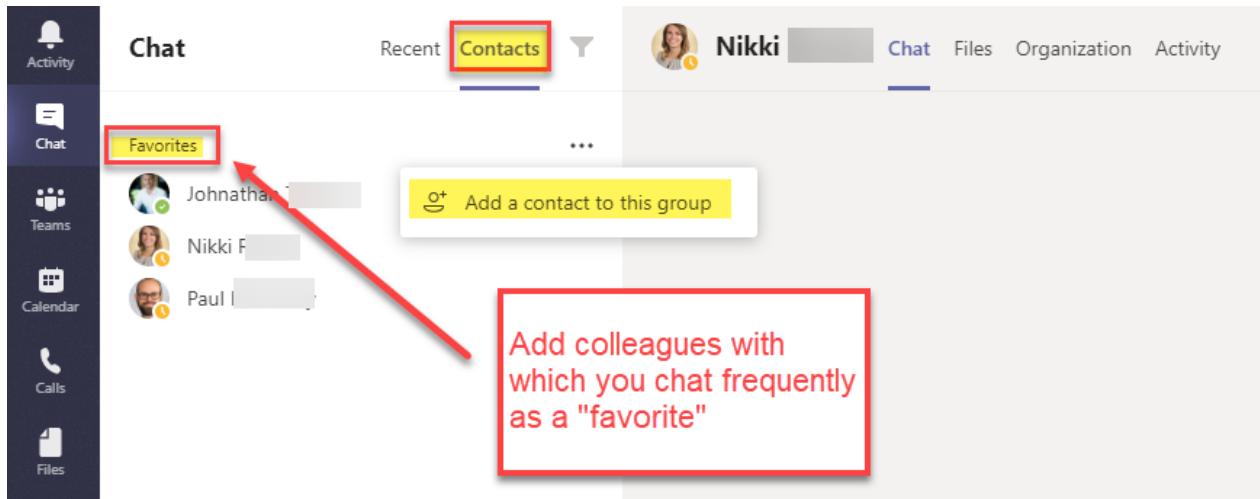
Teams Features

The "Teams" features are for collaboration and information sharing.

Microsoft starts by establishing a "team." Once a "team" is established, add channels for specific projects and work. Anyone can create a team.

To create a "team," navigate to the "team" and scroll to the bottom of the toolbar. Note: if you are the "owner" of a team, you assume admin responsibilities for the team.
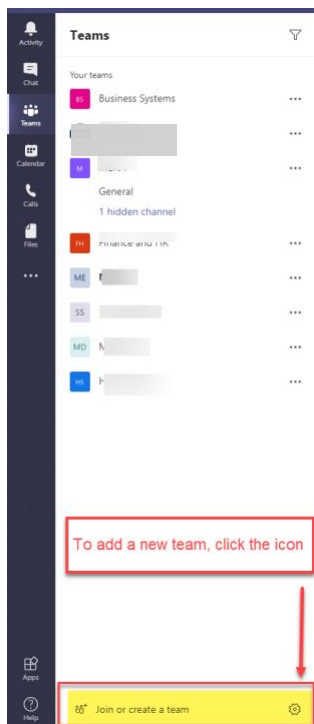
Look to the right side of the screen and select "Create a team."
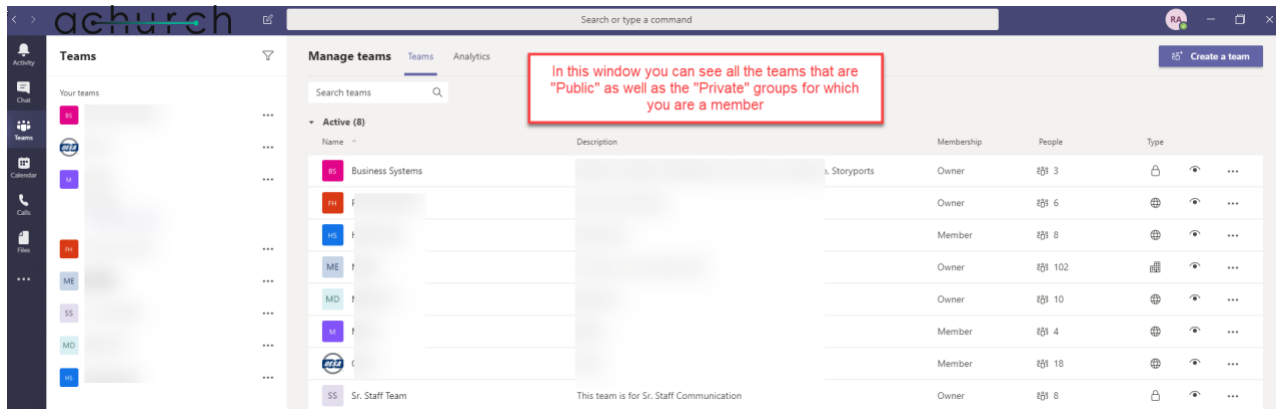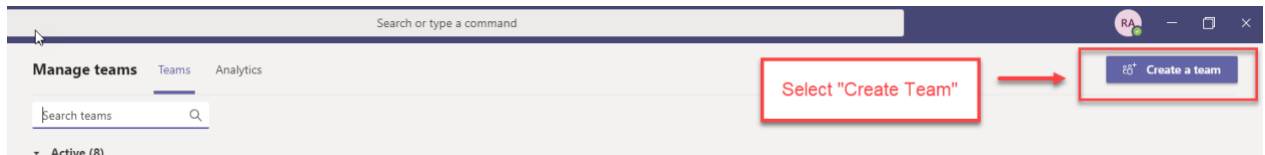
Depending on your configuration with Office 365 or Azure, you can create "teams" dynamically. For this example, "teams" will be "Built from Scratch."
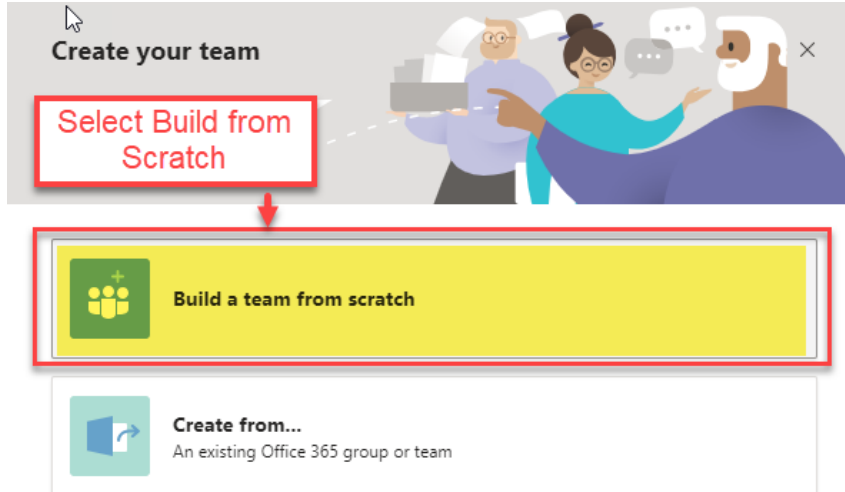
You can choose the type of team. For now, select either Private or Public.

- Private = Invite only.

- Public = Anyone can join.

Creating Channels

Channels are a subset within a team. Use these for projects and communication that everyone may be interested in, but not everyone on the team needs to be involved.

Once the "teams" are established, add specific channels for specific topics and projects.

The Difference Between Chats and Conversations

Chats – These are done via the Chat tab on the left-hand menu and are more traditional chats where you can have 1-to-1 or group chats. This is like an IM.
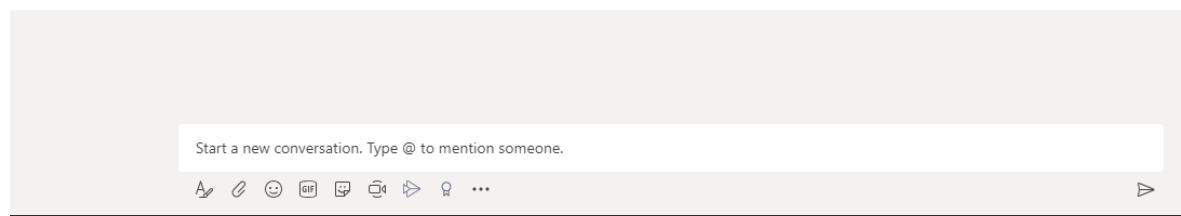
Conversations – Similar to "chat", "conversations" give structure around a topic and allow for ongoing collaboration.
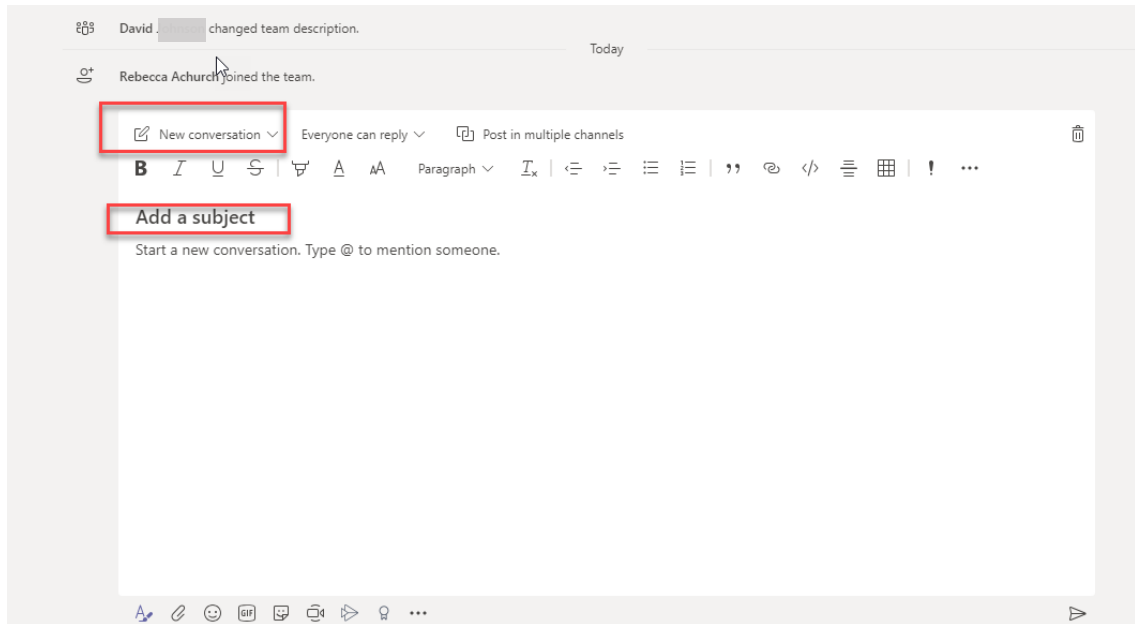
Some tips for conversations:
- **Reply** – The 'Reply' option under each conversation should be used to add further points to that conversation.
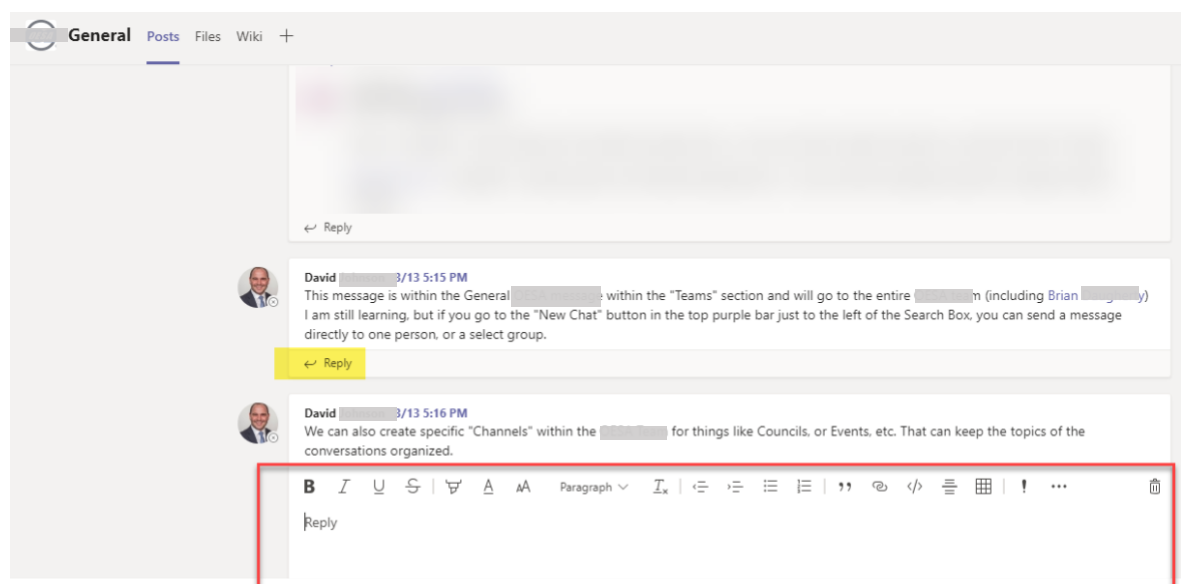
- **New Conversation** – The bottom chat entry is used to start a new chat. This is the one most commonly misused, as people try to use it to reply to the existing conversation when they should have used the 'Reply' option.

- **Subject** – When creating a conversation, it is good to add a subject – By Clicking the 'A' icon you get more edit options. Adding the title helps keep focus and context to that conversation.

- **@mention** – When starting a conversation or asking a specific question, use the @mention functionality. To get the whole channel's attention, use the name of the channel. Need to get someone's attention use the @ and then their name. The relevant people then get alerted to this new reply or conversation.
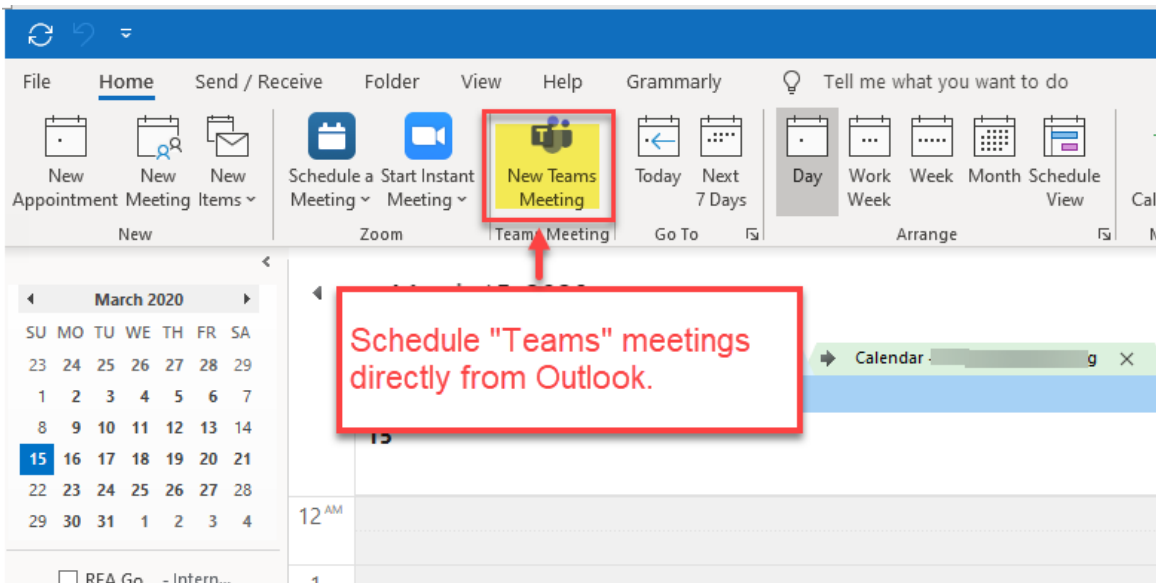
Pin Your Most Frequently Used Teams

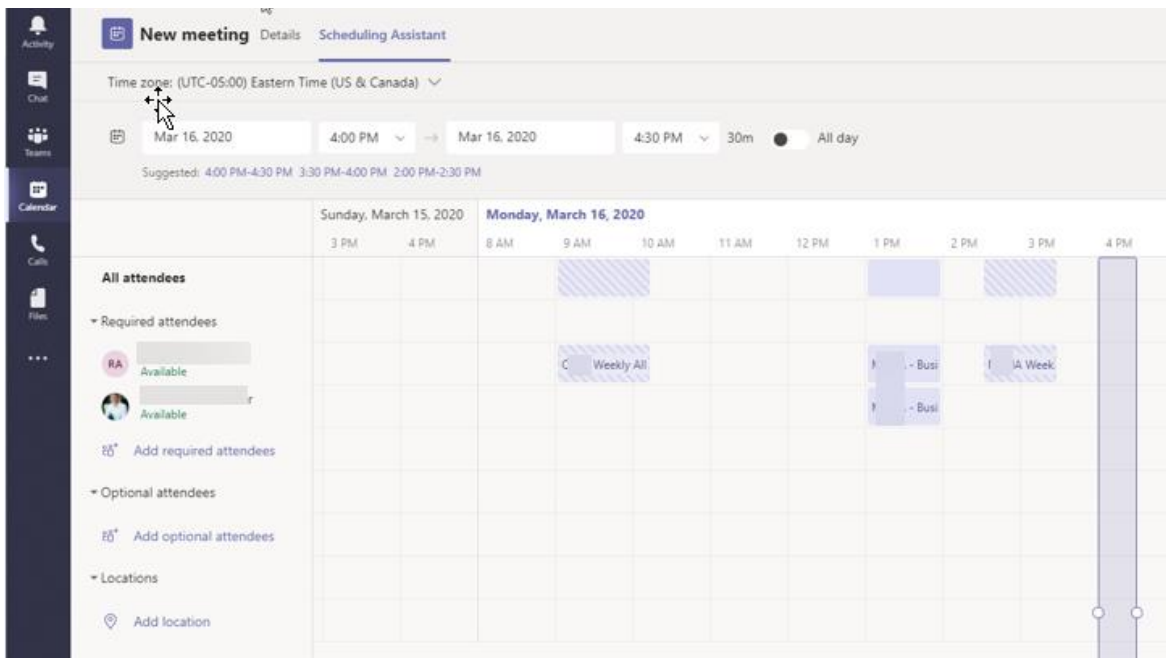Just like other Microsoft programs, you can "pin" important information for quick access.
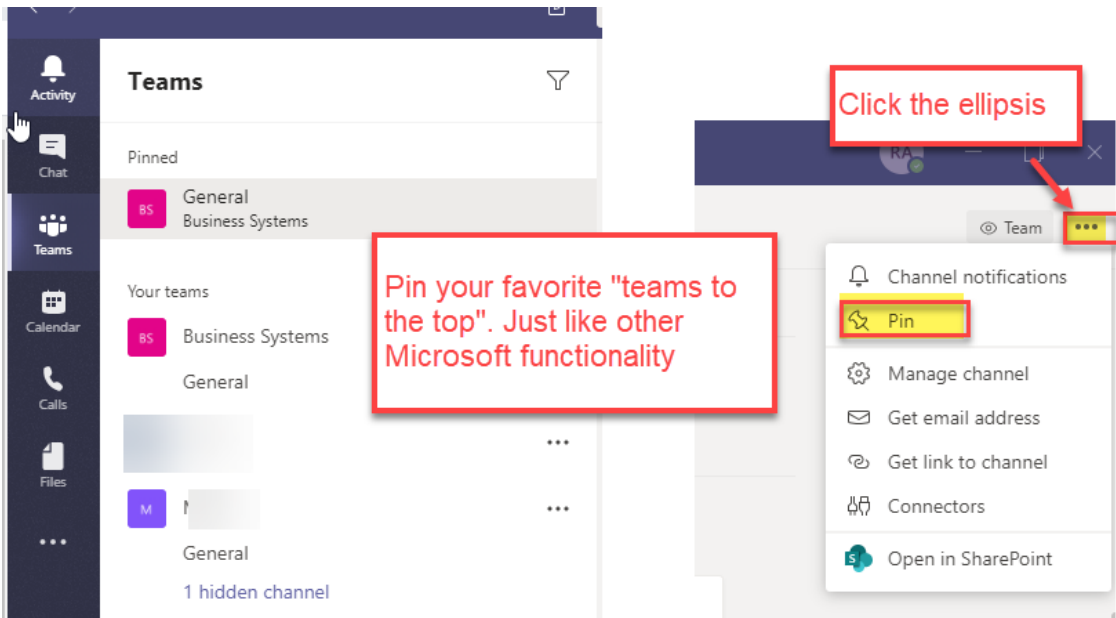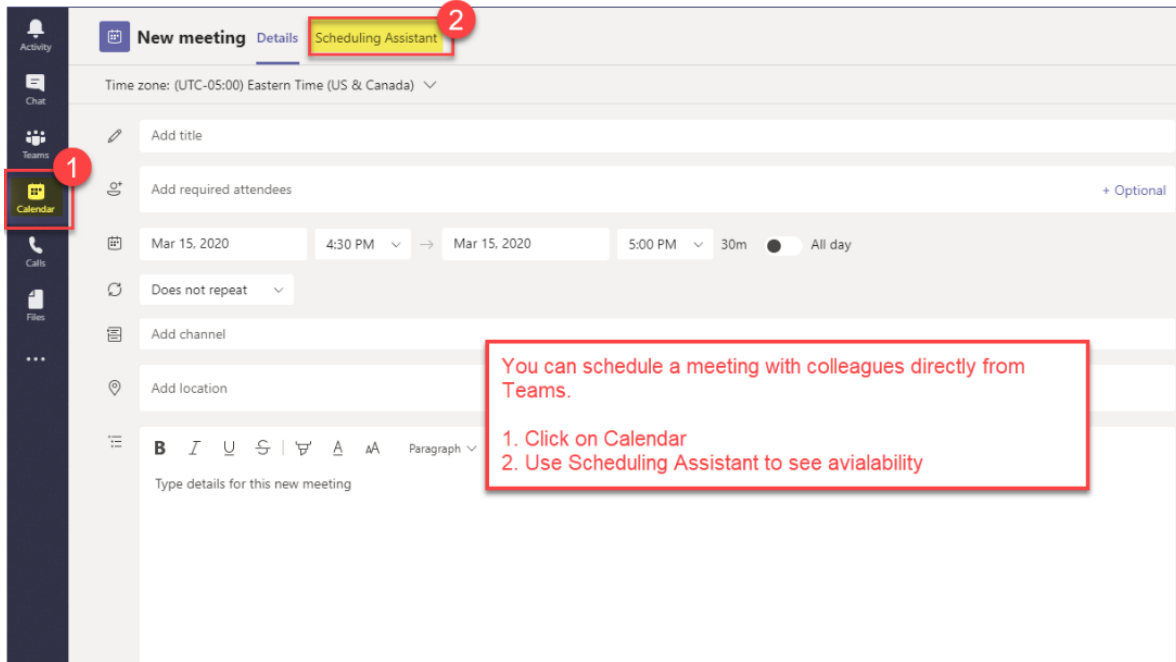

Scheduling a Meeting from Outlook

Once you've installed Teams, restart your computer. You should then see the following "add-in" in Outlook for Teams. Pressing this will allow you to schedule a "Teams" meeting directly from your Outlook Calendar.
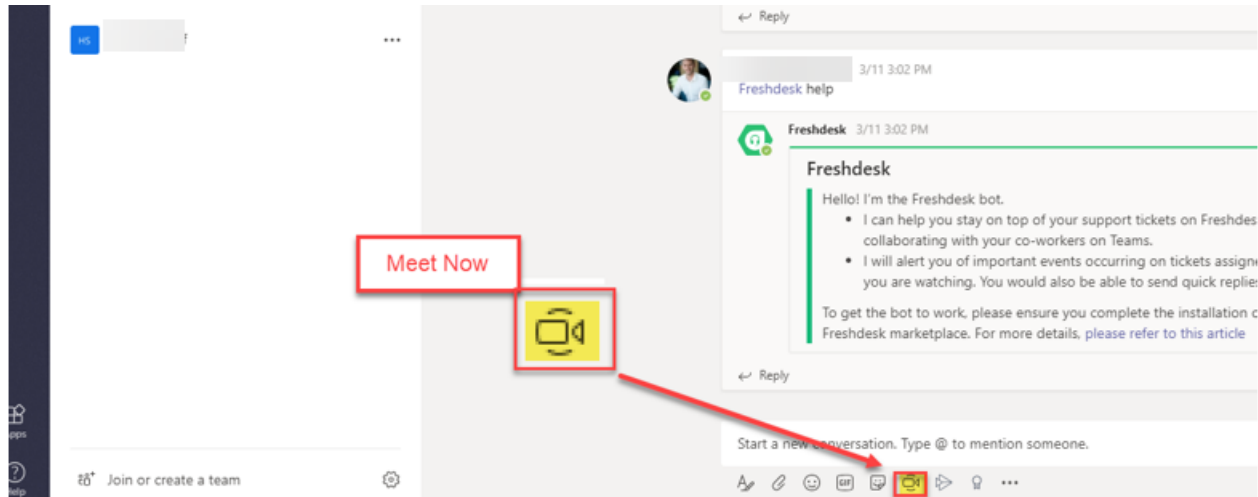
Scheduling a Meeting from Teams

You can also schedule meetings from within teams.

You can schedule a meeting with colleagues directly from Teams.

1. Click on Calendar
2. Use Scheduling Assistant to see avialability

"Meet Now"

From within a channel, you can select the "meet now" icon and it will connect with the entire team.

Actions from the Search/Command Box

The search bar at the top provides more than just search functionality, it has some great command options. This also works with integrated apps, but we'll save this for later.
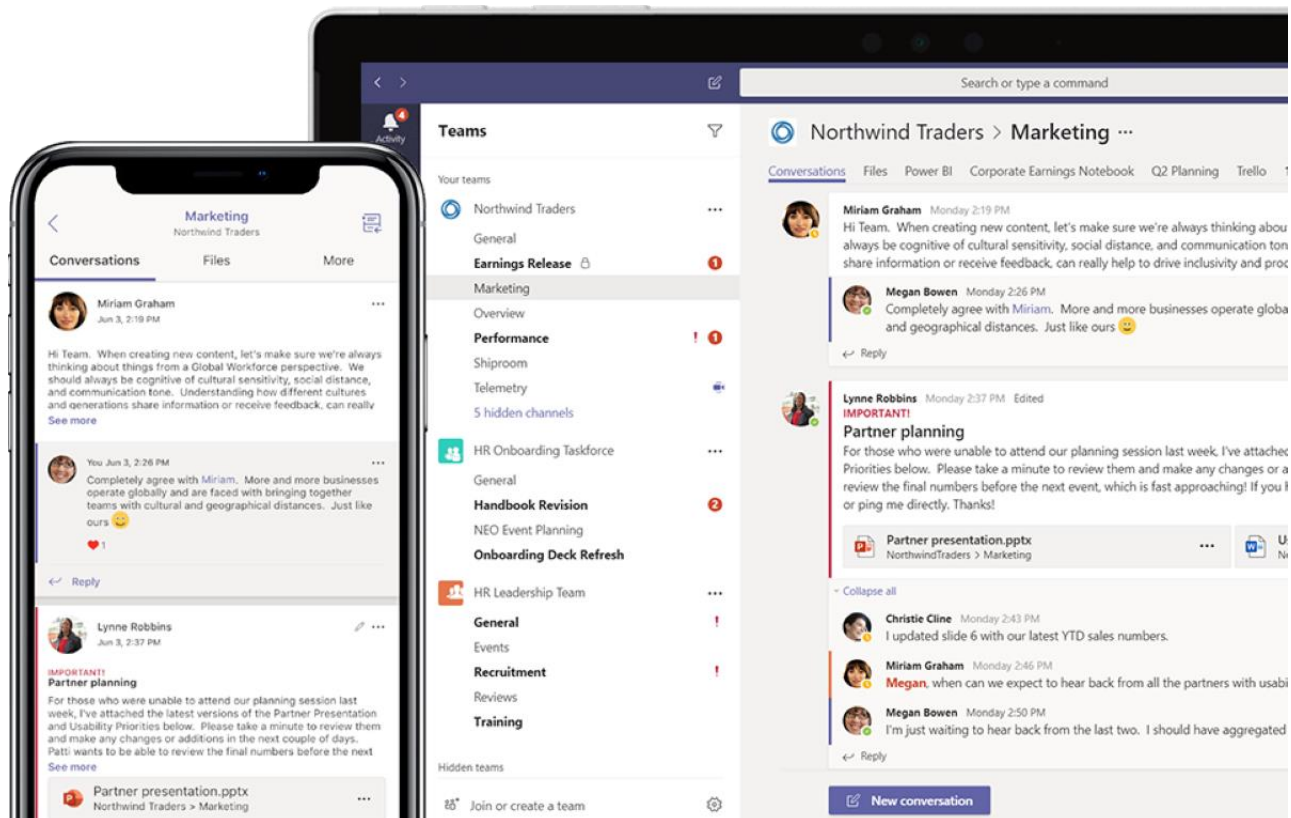
To see the list type '/' for the commands:

- **/whatsnew** – This has to be the most useful one given the speed that Microsoft releases changes these days. This takes you to the Release notes tab in the T-Bot channel. It's worth a regular check.

- **/go to** – If you have a lot of teams or channels or spend a lot of time, as I do, in the Chat part of Teams, then this is a good way to hop straight to your destination.

- **/unread** – Helps in those busy times, and pulls up a list of all your unread items.

- **/mentions** – Gives a list of all your @Mentions. This will include direct tags or where are when a team you are in has been tagged.

- **/files** – Shows your recent files and allows you to search and go to the file you want rather than having to click around your teams to find what you need.

- **/keys** – This is a shortcut to show shortcuts. Nice quick reference for the Microsoft Teams Keyboard Shortcuts.

- **/call** – This allows you to type the first few letters of the person you want to call and select them to call. In big organizations, this could be very timesaving.

- **/help** – Pretty self-explanatory and straightforward. A quick way to ask a question of Teams help via the T-Bot.

- **/saved** – This takes you straight to your list of saved messages.

Additional Training Materials

More details information can be found at: https://support.office.com/en-us/article/microsoft-teams-video-training-4f108e54-240b-4351-8084-b1089f0d21d7

Managing Notifications: https://support.office.com/en-us/article/manage-notifications-in-teams-1cc31834-5fe5-412b-8edb-43fecc78413d#ID0EAABAAA=iOS

SUMMARY

We urge employers to closely monitor guidance issued from the CDC. As of March 16, 2020, the CDC recommends:

> *All employers should be ready to implement strategies to protect their workforce from COVID-19 while ensuring continuity of operations. During a COVID-19 outbreak, all sick employees should stay home and away from the workplace, respiratory etiquette and hand hygiene should be encouraged, and routine cleaning of commonly touched surfaces should be performed regularly.*

In addition -

> *In accordance with its guidance for [large events and mass gatherings,](#) [the CDC] recommends that for the next 8 weeks [as of 3/16/20], organizers (whether groups or individuals) cancel or postpone in-person events that consist of 50 people or more throughout the United States.*

Given the continually changing updates and increasingly stringent restrictions being placed on public gathering and travel, transitioning your team to a remote workplace (even if only temporarily) is a great way to minimize interruptions in your service to your members. While this is a difficult time for all of us, we are very fortunate to be living in a period of history when we can use technology to help us keep working while following social distancing to minimize risk and save lives.

I am here to help if you are interested in a personal consultation on transitioning to a virtual workplace. Please contact me at info@achurchconsulting.com if you would like to schedule a time to talk.

Stay safe and wash your hands!