**Managing Hybrid Teams Communication Planning Guide**

**Overview:**

The pandemic’s sudden remote work transition challenged even experienced managers. For those new to managing or those with little leadership training, the challenge of managing people through a crisis while working remotely has also made certain skill deficits clear.

* Catapult offers the Management Advantage curriculum which tackles both the “general HR functions” of a manager, as well as the skills needed to provide leadership that identifies, supports, engages and retains talent. You can search classes on our course page or call our Training Department to learn more about our curriculum, build a custom plan and discuss best classes for your needs.
* Whether you choose Catapult or another management training provider, be sure that you consider the following:
  + Training should be planned based on specific company needs and should not be a one-time event.
  + Include HR staff and top leadership in the training so that the whole company is “on the same page”.
  + Senior leadership should show firm support and articulate a vision for what a true leader is (specific to your company)
  + Courses on their own are forgotten very quickly if the techniques are not practiced frequently. Develop other tools and supports to ensure ongoing knowledge retention, and how to apply techniques in the real world:
    - hands-on tools/checklists
    - follow up check-ins
    - “homework” or at-work practice assignments
    - manager support/discussion groups
    - book, podcast or other sources of information that managers can discuss together

This tool and fact sheet can be used in conjunction with training and is meant to support hands-on execution of leadership training related to leading remote or hybrid teams.

**Communications Methods:**

As remote work and hybrid work become a normal part of operations, managers need to make informed decisions about the types of communication tool that they use for connecting with their staff. The chart below articulates some of the reasons that one communication method might be more successful than another in certain circumstances.

While research and surveys bear out that staff are often more productive at home, that productivity can be drained by poor use of technology. Managers and companies can manage this in a variety of ways. Some companies limit the number (or day) of Zoom Meetings; others turn off cameras during meetings or require that quick questions are handled by phone or chat. The term “zoom fatigue” is used when employees feel exhausted and demotivated by excessive video conferences. Why is it more tiring to have video conferences than in person meetings? Consider the following:

1. In an in-person meeting, all eyes focus on the speaker. You do not get distracted by others’ movements, expressions, etc. In a video conference, each person is represented on camera at all times. Subconsciously you are absorbing much more information than you need and it takes effort to concentrate on the speaker.
2. In an in-person meeting, you are able to read body language. Often on video conferences, you may see only a part of a face, or a shadow in front of a bright background. Our brain is scrambling for necessary information to assess intent, mood, etc. and is unable to find it. This makes us feel off-balance.
3. We have to see our own faces in a video conferenced meeting. This causes us to have yet another source of information that is irrelevant and distracting. And many of us find our own faces difficult to look at, prompting issues with self esteem and making us feel less comfortable speaking up.
4. Not only are the small tiles in a video conference overwhelming, so are the frequent chat messages that pop up from time to time. There is a reason we don’t pass notes during meetings continually. It is distracting.
5. When working on a project often we sit together, shoulder to shoulder, and feel unified as we tackle a complex task. On a video conference, we see everyone’s faces in miniature (or no ones’) as we look at a project in a screenshare. Not only that, the screenshare itself is often tiny and limits your ability to scroll around as necessary. This can be alleviated by some screen sharing tools, so consider options such as Miro or Mural, or other whiteboard options for more complex discussions.

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| **Type of Meeting** | **Possible Communication Options (in order of most appropriate)** |
| **One on One** | **In-person –** For in office staff, in-person is best. Remember that your office, their office or a separate space are all options. Consider your employee’s personality and choose the best option to make them feel comfortable.  **Telephone** – If your staff are remote, phone is a viable alternative and avoids zoom-fatigue. If you rarely see remote staff (few video calls and don’t come into office), then video may be better.  **Video-Conference** - If your workplace is partially or fully remote and you and your staff prefer video conference (this may be the case if you have infrequent meetings), it may be a better alternative than phone. (Often “zoom fatigue” can be alleviated by avoiding video unless absolutely necessary.)  **Email** – Email should never be used for back-and-forth discussions, or situations that may require tact or the ability to assess another person’s reaction in real time. Nevertheless, as a quick recap of a discussion, it is excellent. Often one-on-ones and other meetings fail because the information in the meeting is never put in writing to ensure understanding. |
| **Staff Meeting** | **In-person –** For in-office staff, in-person is best. For a hybrid staff, in-person meetings can reduce productivity if they are required frequently. If hosting in person, remember that your office, one of their offices or a separate space are all options. Consider your employees’ personalities and choose the best site to make them feel comfortable. (A separate office, for example, may avoid the distractions of work.)  **Video Conference** - If your workplace is partially or fully remote, this is a great option instead of mandating that all remote workers come into the office. This can help keep the perception of an “even playing field” – coming to the office is an interruption of a remote workers’ productive time and is not necessary for most meetings. You can have office staff together in an onsite space, and have remote staff engaging by video conference. Remember that everyone is different and zoom-fatigue can truly sap energy and enthusiasm. Consider having all those who are not talking mute and go off camera. They can comment in writing on chat or turn on their video to talk. You might ask that everyone be “on camera” for the first few minutes of the meeting, or during certain parts of the discussion, but don’t let it be the default.  **Telephone** – Generally staff meetings entail topics that can be “touchy” – for example, changes in procedure, concerns related to processes, etc. Telephone is not as supportive of this type of discussion.  **Email** – Email should never be used for back-and-forth discussions, or situations that may require tact or the ability to assess another person’s reaction in real time. Nevertheless, as a quick recap of a discussion, it is excellent. Often one-on-ones and other meetings fail because the information in the meeting is never put in writing to ensure understanding. |
| **Ongoing Training** | **In-person –** No other option allows you to “wake up” staff who are zoning out during a training. Many staff have trouble focusing during longer “listening” sessions. In person meetings allow you to identify fatigue easily and have people get up and stretch. It is also the easiest way to engage staff in group projects or discussions.  **Live Video Conference or Video Training** - If your workplace is partially or fully remote, this is a great option. You can have office staff together in a space, and have remote staff engaging by video conference. Again, despite the fact that you want to check interest in the training, consider having some “off camera” periods to reduce fatigue. If you can include group discussions, do so. Many video conferencing platforms allow for breakout groups. These can mimic small table activities and discussions that you can do in-person.  **Webinar** – Webinars are the least engaging training option. If you do have employees get trained in this way, try to find modules that ask questions and have quizzes. View the material yourself – Would you be engaged? |
| **Team Building** | **In-person –** There is no substitute for the organic connections that are built by wandering around during a break or playing a team building game.  **Video Conference** - If your workplace is partially or fully remote, this is a great option. It may be difficult to include in-office and remote personnel but try to do so without losing the opportunity for both groups to connect. This may take planning, use of breakout rooms, and even physical activities. Even in this setting, there may be times where you take off the requirement to be on camera/audio, particularly if you use video conferencing frequently.  **Some great options for online team building:**   * **Mail a party pack ahead of time to snack on** * **If you have a large group, break out rooms that shift occasionally mimic the organic nature of in-person parties** * **Have activities and games - J**ust as at a regular gathering, awkwardness can ensue when a breakout group combines people who don’t know each other well. The best games and activities help people get to know one another. Some of the activities our HR Leader, Lauren Hardwick, has tried at Catapult: Two Truths and a Lie, Scavenger Hunt (find something that you have had since high school). Here is another site with additional resources: <https://museumhack.com/virtual-team-building-for-remote-teams/> |
| **Check In** | Any quick method – try to vary them: in-person, phone, Teams or other office chat tools, email, etc. |

**Developing your communication plan:**

As a manager, you must create habits in order to ensure that you don’t forget important communications with staff members. It is easy to grow focused on a crisis, project or simply on your own work and allow it to pull you away from the needs of your staff.

Develop a plan for communication using the following steps. Eventually, much of this will become habit.

**STEP 1: Document your staff’s preferences and needs.**

This step could be completed based on behavioral profiles such as the Predictive Index (which Catapult facilitates), or your own assessments. It is important to remember that each employee is different. One communication style or method may be fine for most staff but fail entirely with another staff member who thrives under a different type of communication.

As a manager, part of your job is to understand those needs. In addition to assessments, surveys or questions can help you figure out what your employee’s preferences may be.

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| **Staff Name** | **Job Title** | **Date in Job** | **Personal Needs/Communication Preferences\*** |
| Ex. Rosa Flores | Cust. Svc. Rep. | 03/01/2021 | New Hire – still need training; lacks confidence, often asks others to review her responses, very team oriented and likes to talk out problems/get advice |
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**STEP 2: Document departmental/job communication needs**

This step can be completed by reviewing how your “in-office” meetings occurred in the past, and whether those schedules will continue to be sufficient or whether there have been changes or issues that additional (or fewer) meetings would help support. This step is best done after eliciting feedback from staff related to their needs. For example, you may have never had staff meetings in the past but have heard complaints of “we are always the last to know” or are now hiring more frequently and need more frequent meetings to build relationships between existing and new staff.

If you aren’t sure about how frequent meetings should be, here are some ideas to get you started:

**One on One Meetings:**

Staff generally feel neglected if their manager meets with them only once a year. In lower-level roles where the job responsibilities are fairly fixed and perhaps the employee is not seeking growth (maybe they are just there for a summer job), a monthly or quarterly check in may be fine, and this meeting may be informal (more of a meet in the hallway conversation). This check-in doesn’t take the place of daily notice of positive events (or correction of errors). In roles which require discretion and judgement, weekly is more appropriate.

**Staff Meetings:** Normally, for teams whose task requirements are not consistently repetitive or for jobs that require coordination with others, a weekly staff meeting is important. Sometimes daily “5-10 minute” staff meetings are best in departments which require a lot of coordination. Determine what is best for your team based on complexity, changes and interrelationship with others.

**Check Ins:** Below are some of the common times that employees interact with others. How will you replace those? Build these interactions into your calendar as well. Some examples are provided to get your mind working.

After-meeting hallway discussion – Instead, choose a staff member to call afterwards and ask how they felt the meeting went.

Watercooler discussion – Email one funny thought, video or article to staff each week (work appropriate).

“Help me, I’m drowning” (when a staff member pops in to express frustration) – Consider a pulse check daily or weekly. In some HRIS systems, this can be automated, or you can send out a message on teams: “What is your emoticon today?” If someone shows the “frustrated” icon several days in a row, it might be time to check in by phone.

Complete the chart below for each position:

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| **Job Title** | **One on One Frequency** | **Staff Mtg Frequency** | **Ongoing Training/ Frequency** | **Team Building Frequency** | **Inter-Department**  **Meetings** | **Check-Ins/Other** |
| Ex. Cust Svc Rep | Biweekly | Monthly | Monthly | Quarterly | Bi-Monthly | At least 1X/3 Days |
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**STEP 3: Build your “extra” communications for staff**

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| **Staff Name** | **Job Title** | **Date in Job** | **Personal Needs** | **Meeting Type** | **Frequency** |
| Ex. Rosa Flores | Cust. Svc. Rep. | 03/01/2021 | New Hire – still need training; lacks confidence, often asks others to review her responses, very team oriented and likes to talk out problems/get advice | Hands-on training | Weekly for 1 month – watch her with a shared screen; listen in on a few calls. She likes the feedback and to discuss how she is doing. |
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**STEP 4: Create your communication calendar**

* Using individual and staff meetings as established in the first steps above, add those meetings to your Outlook (or other) calendar and determine the best method of communication using the communication method table at the beginning of this document.
* Communicate the new meeting time schedule to staff and send invites if necessary for ongoing meetings.
* Get comfortable with reminding/checking in on employees who fail to show for meetings or who tend to be forgetful. Remember that you are building their habits, not just your own.
* Resist the temptation to cancel or postpone work meetings when you feel overwhelmed. You can shorten meetings if there isn’t much to discuss, but in chaotic times often people need structure and connection.

Remote and hybrid offices can work, but it is important to plan to ensure communications are effective. If you need additional support, call Catapult’s Advice Team!

Written by a Catapult Advisor.