

Managing Remote Teams

Presented by IMA Leadership Academy

Cate Long, CMA

August 9, 2022



The Association of
Accountants and
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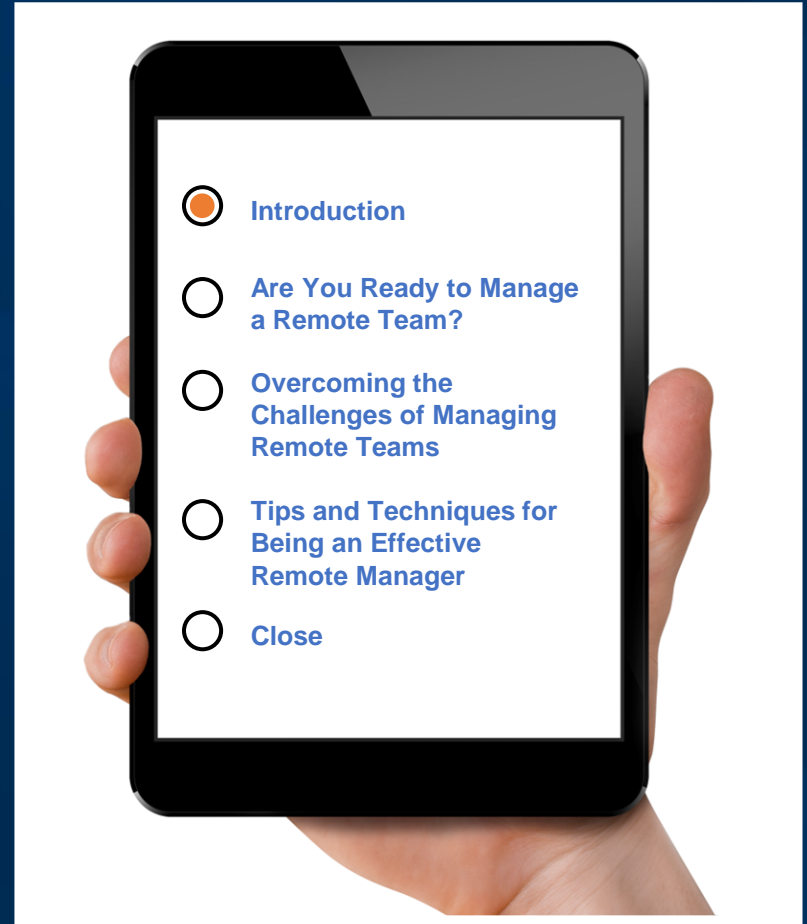
Cate Long's Biography

- Cate Long, CMA , is in her second term as a member of the Global Board of Directors through June, 2023. She currently serves on the Strategic Planning Committee. Cate is active with the IMA Campus Influencers, is a Board of Governors member for SCMS, and has served as President for the Las Vegas Chapter. She has served on the IMA Committee on Ethics, the Global Awards and Selection Committee, the Global Board Membership Relations Committee, Chaired the Global Board Volunteer Leadership Committee in 2021, and served on the Governance and Nominations Committees.
- Cate led a 16 year career in various strategic roles for SAP, Concur, a travel and expense software company. She was VP of Professional Services, led the first Customer Experience improvement team, and launched the small and middle market strategies and methodologies for account management and implementation services, building out global teams in the Americas, Asia and Europe. Prior to her career in software, Cate was a Controller for mid-sized manufacturing companies. Cate is currently an Executive Advisor for start-up companies.
- Cate holds a BA in Accounting from The University of Mount Union and an MBA from the University of Nebraska, Omaha. Please connect with Cate on LinkedIn at [linkedin.com/in/cate-long-9649412](https://www.linkedin.com/in/cate-long-9649412).

Agenda

While remote working has gradually been trending higher over the last several decades, the 2020 pandemic means that many more organizations and employees have been working remotely. Even when the pandemic is over, more and more organizations will be embracing remote work for their employees, at least part of the time.

The goal of this course is to help managers effectively lead remote teams.



Learning Objectives

DEFINE

Remote work

IDENTIFY

The challenges and opportunities of managing a geographically disbursed team

ASSESS

Their readiness to manage a remote team

DESCRIBE

Tips and techniques for effectively managing a remote team

Reflection



- 1 What experience have you had with working remotely? How did you feel about working remotely?
- 2 What characteristics make a good remote manager?





ARE YOU READY TO
MANAGE A REMOTE TEAM?

Definition of Remote Work

A group of professionals working together to serve a common purpose while being geographically dispersed across regions, states/provinces, and/or countries.

A dispersed team generally reports to the same organization and manager, and is jointly responsible for achieving a set of goals and objectives.



Understanding the Benefits

- Working with top professionals from anywhere
- Attracting employees and partners who might not otherwise consider your company
- Focusing more on results than on administrative tasks and meetings
- Happier employees who enjoy work flexibility while developing themselves professionally
- Reduced costs and fewer office policies and conflicts



Poll Question 1:

Which of these benefits do you consider the greatest benefit of remote work?

- a. Working with top professionals
- b. Focusing more on results
- c. Greater flexibility while also developing professionally
- d. Reduced costs
- e. Fewer office politics and conflicts

Poll Question 1 Results: (Placeholder)

Basic Requirements for Successful Remote Working

- Specific goals and KPIs
- Good collaborative practices
- Videoconferencing capabilities
- A variety of communication tools
- Remote access tools
- A focus on completing tasks and hitting deadlines rather than on hours worked



Leadership Styles that Work Remotely

Transformational

- Supportive and nurturing
- Aims to inspire and motivate
- Values the identity of the individual while building a strong team identity
- Finds the *purpose* behind the work

Transactional

- Focused on goals and outputs
- Delivers efficiently and with quality
- Getting things done
- Not effective for innovation and change
- Effective for refining existing processes and helping to be more efficient

Situational

- Adapts to what the situation requires
- Requires a high level of adaptability and flexibility
- Requires the ability to quickly analyze a situation and apply the correct approach

Self-Assessment

- Rate yourself on 10 statements

1

*Does not describe
me at all*

2

3

*Sometimes
describes me*

4

5

*Fully
describes me*





OVERCOMING THE CHALLENGES OF
MANAGING REMOTE TEAMS

The Challenges

- Lack of face-to-face time
- Lack of access to information
- Social isolation
- Distractions at home
- Communication
- Varying time zones



Poll Question 2:

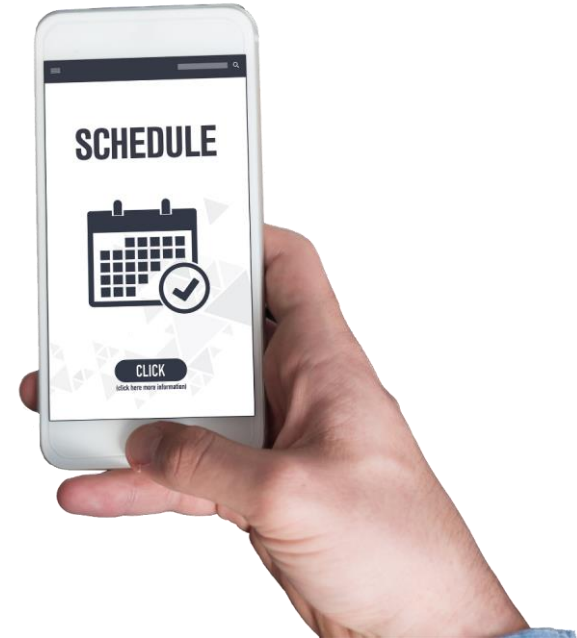
Which of the challenges have you found MOST difficult when working remotely?

- a. Lack of face-to-face time
- b. Lack of access to information
- c. Social isolation
- d. Distractions at home
- e. Communication
- f. Varying time zones

Poll Question 2 Results: (Placeholder)

Overcoming the Lack of Face-to-Face Time

- Establish regular check-ins
- Provide several different communication technology options
- Establish “rules of engagement”



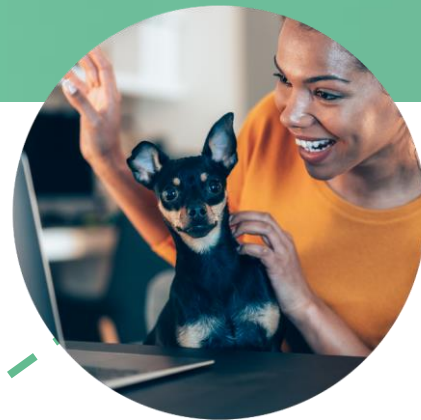
Overcoming the Lack of Access to Information

- Establish shared storage
- Establish “rules of engagement”
- Map out sources of information



Overcoming Social Isolation

- Establish regular check-ins
- Provide opportunities for remote social interactions
- Offer encouragement and emotional support



Overcoming Distractions at Home

- Provide guidelines for establishing a good remote workplace
- Encourage mutual support and interactions to overcome distractions
- Be patient



Overcoming Communication Hurdles

- Make a variety of communication technologies available
- Establish regular, scheduled check-ins
- Establish “rules of engagement”



Poll Question 3:

To overcome communication hurdles, which of these tactics have you found most useful?

- a. Using a variety of technologies
- b. Establishing regular, scheduled check-ins
- c. Having each team member indicate the best method and times for ad hoc communications
- d. Defining where to find or whom to contact for various information needs
- e. Determining the best means for contacting those outside of the organization

Poll Question 3 Results: (Placeholder)

Adjusting to Time Zone Differences

- Establish “rules of engagement”



• New York •



• London •



• Frankfurt •



• Hong Kong •



• Tokyo •



TIPS AND TECHNIQUES FOR BEING AN
EFFECTIVE REMOTE MANAGER

Tips and Techniques



Onboarding new remote employees



Structuring priorities



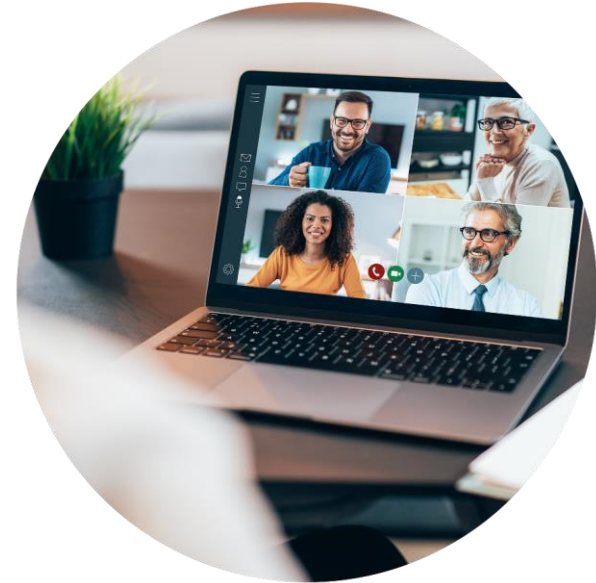
Managing performance



Providing support



Developing relationships



Onboarding New Remote Employees



- Start early
- Get employees online ASAP
- Provide a digital employee handbook
- Create a sense of belonging
- Provide an individualized remote onboarding plan
- Initiate professional development and personal growth from the start
- Encourage collaborative learning

Structuring Priorities



Organizational Changes

- Write clear briefs for every project
- Change the format of all business meetings to include remote workers
- Make everything transparent, clear, and documented
- Set clear expectations for working hours

Reporting

- Weekly one-on-one
- WAR (Weekly Action Review) meeting
- End-of-day check-in

Poll Question 4:

Which of these reporting methods have you used when working remotely? (Select all that apply)

- a. Weekly one-on-one
- b. Weekly Action Review (WAR)
- c. End-of-day check-in
- d. Other report
- e. No reports or only as required

Poll Question 4 Results: (Placeholder)

Managing Performance



- Set clear expectations
- Focus on outcomes, not activity
- Resource your team
- Treat remote employees as local
- Engage on a daily basis
- Schedule video-based coaching
- Help them get aligned with the organization's mission and values
- Calibrate performance
- Make work visible
- Be flexible

Providing Support



- Provide emotional support
 - Regular check-ins
 - Virtual social activities
 - Discussions about mental well-being and work-life balance
- Provide clarity
 - Give information and take input
 - Get leaders involved in conversations
- Provide tips for making remote work easier
 - Make online training available
 - Give time to deal with personal lives
 - Allow flexibility

Developing Relationships



- Be accessible
- Make time for informal conversations
- Use video
- Schedule weekly calls with clear agendas
- Be considerate of time zones and cultures
- Have in-person meetings upon occasion
- Level the playing field

Poll Question 5:

How do you feel about using your webcam in meetings?

- a. I'd rather not use my camera.
- b. While I'd rather not be on camera, it does help, so I use mine.
- c. I don't mind using my camera.
- d. If cameras are not on, people are not paying attention, so they must be used.

Poll Question 5 Results: (Placeholder)

The 3 C's

Connection

- Create a buddy system
- Do virtual team-building exercise
- Host virtual coffee or happy hours
- Create a team goal that everyone is responsible for
- Send them swag
- Create a mini book of team bios

Communication

- Use video on calls
- Lead a brief daily huddle for the team and weekly one-on-ones
- Lead quarterly live team meetings with recognition
- Hold Q&A sessions with executives
- Begin meetings with icebreaker questions
- Set up email for feedback and recommendations
- Conduct focus groups

Collaboration

- Allow remote workers to lead/own major projects
- Assign problems to several remote workers
- Invest in state-of-the-art collaboration tools
- Mind the time zone
- Ask the team to create a team charter
- Hold a monthly Team Innovation Meeting
- Recognize, reward, and celebrate collaborative behavior



CLOSE

Review



Are you ready to manage a remote team?

- Defining remote work
- Understanding the benefits
- Basic requirements
- Leadership styles
- Self-assessment

- Lack of face-to-face time
- Lack of access to information
- Social isolation
- Distractions at home
- Communications
- Varying time zones

The challenges of leading remotely



Tips and techniques

- Onboarding new remote employees
- Structuring priorities
- Managing performance
- Providing support
- Developing relationships

Learning Objectives, Revisited

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Action Planning

- 1 Go back and review your self-assessment that we completed near the beginning of the workshop on your readiness to manage a remote team.
 - Are there any adjustments you should make to your ratings upon further consideration?
 - Is there anything you would add or change to the areas you can develop?
- 2 For each of the three major topics from this workshop, what is one thing you can do in the next week and another in the next month to be a better manager of a remote team?

Readiness to
Manage a
Remote Team

Overcoming the
Challenges of
Managing Remotely

Being an
Effective Remote
Manager

Questions and Answers



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Thank You to Our Featured Presenter!

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Final Reminders

► **Complete the Evaluation poll** – 2 options

- On your screen
- Evaluation Survey icon at the bottom of your console

► **Access to your CPE Certificate** – 2 options

- Click the “CPE” icon at the bottom of your console
or
- Click the link in your post-event e-mail

► Please print a copy of the CPE certificate for your records.

► Your CPE credit will be automatically recorded in your transcript.

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Thank you!



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