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A practical guide to unlocking your  
team's remote working potential.

# THIS BOOK'S GOAL IS TO HELP YOU CHANGE

We've designed this book to take a complex topic—building culture remotely—and make it actionable by answering the most important question... **Where do you start?**

- 1 ME | Mastering Yourself:**  
Organising your workspace and headspace for optimum remote performance.
- 2 WE | Mastering Social Interaction:**  
Learning to communicate effectively within a remote team.
- 3 US | Mastering Teamwork & Managing Distributed Teams:**  
Improving your remote team management skills.
- 4 Templates and Formulas:**  
Remote team agreements template and meeting formula ideas that improve your effectiveness.



**“The secret of change is to focus all of your energy not on fighting the old, but on building the new”** - Socrates

As a digital transformation consultancy, we have been experimenting with new ways of working, including remote and distributed teams for more than 5 years. Over that time we have made many mistakes (which we hope you can avoid) and many successes (which we hope inspire you) in how to work more effectively in a new way.

Culture and the future of work is one of our core practices, where we help companies transition to new, digitized ways of working. Our experience in helping companies transition led to many of the ideas shared in this book. While technology is important, culture defines success versus failure in these projects. Culture, however, is built up from instilling the right behaviours in teams. This book is about how to build those behaviours.



# me MASTERING SELF

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**There's this 'myth' that keeps surfacing on the topic of remote working: "people who work from home work less".**

Because there's a fear that people think you are slacking off, you spend more time responding to everyone, leaving less time for getting stuff done. But the truth is, very few people really work eight full hours a day in the office-and the biggest challenge in working remotely is finding a good balance between work and actually knowing when to switch off.

## Routine

Creating a solid routine is important for success as a remote worker. Routines help to reduce mental fatigue and make you happier and more productive. But setting a routine can be hard to do—especially when no one is pressuring you to get out of bed.

Since you don't have to commute, it can help to develop a routine using that spare time effectively for things like exercising, reading or studying online. Some people start their day waking up, showering and walking for 20 minutes to get their morning coffee. Others work out, meditate or log in to a group Slack channel and say "hi" to the other 'remoties'.

Whatever your rhythm, this is about building structure through daily practices. Your routine must make time for important things like staring out the window while drinking coffee, stretching and walking around for a change of scenery, or a social teatime chat with a friend.



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## Form & Function

Ever tried to have a creative brainstorm in a grey, uninspiring meeting room? The experience is totally different to having the same kind of meeting in a bright, lit-up room full of plants and colour.

Your physical environment can impact what you do in it. In the same way, your context and location can impact your daily routine. When working remotely, it's not enough to think about what you want to do—you also have to consider where you're going to do it.

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## Personal Workspace

When you work remotely, any space can be every space. Your living room could be your office, boardroom, lunch spot, or chill space—and this means lines can get blurred. Maybe you prefer working under a blanket on your couch but this might not be the best place to facilitate a video call.

Having different zones in the house might be useful, for instance morning versus afternoon spaces, or writing versus meeting or call spaces. Make sure you have a quiet place for meetings and a comfortable place for focused work.

## Communicate Your Boundaries

No two people work the same way. Maybe you like to plan your day according to your circadian rhythm. Maybe your golden hour is between 4am and 5am before the world wakes up. Maybe you have a zero-inbox policy and respond to emails right away. Maybe you like to chat over the phone before you start on a task.

It's important to identify how you work best and then communicate this to your colleagues. It may be your way of working conflicts with company policy, or the way your team likes to work, and you don't get to work the way you want to, but it's vital to share your preferences and how others can get the best out of you.

You could say something like "I'm not in the habit of regularly checking Slack so please send me a WhatsApp message if you need something right away" or "I don't respond to emails on Monday mornings but I do like to check them on Sunday afternoons".

### **Example:**

I do my deep work in the mornings, so please respect my no meetings before 10am preference (i.e. urgent and important meetings only). If you need me for a meeting longer than 90 min please make it collaborative or I am likely to zone out. I'm not checking email often during the day, so if you need something today, it is best to DM me on slack or send me a WhatsApp if it's urgent.

# Deep Work vs Shallow Work

Mark Twain once said that if the first thing you do every morning is to eat a live frog, you can go the rest of your day knowing that it's probably the worst thing that's going to happen to you. Your "frog" is your biggest, most important task. The one you're most likely to procrastinate on if you don't do something about it.

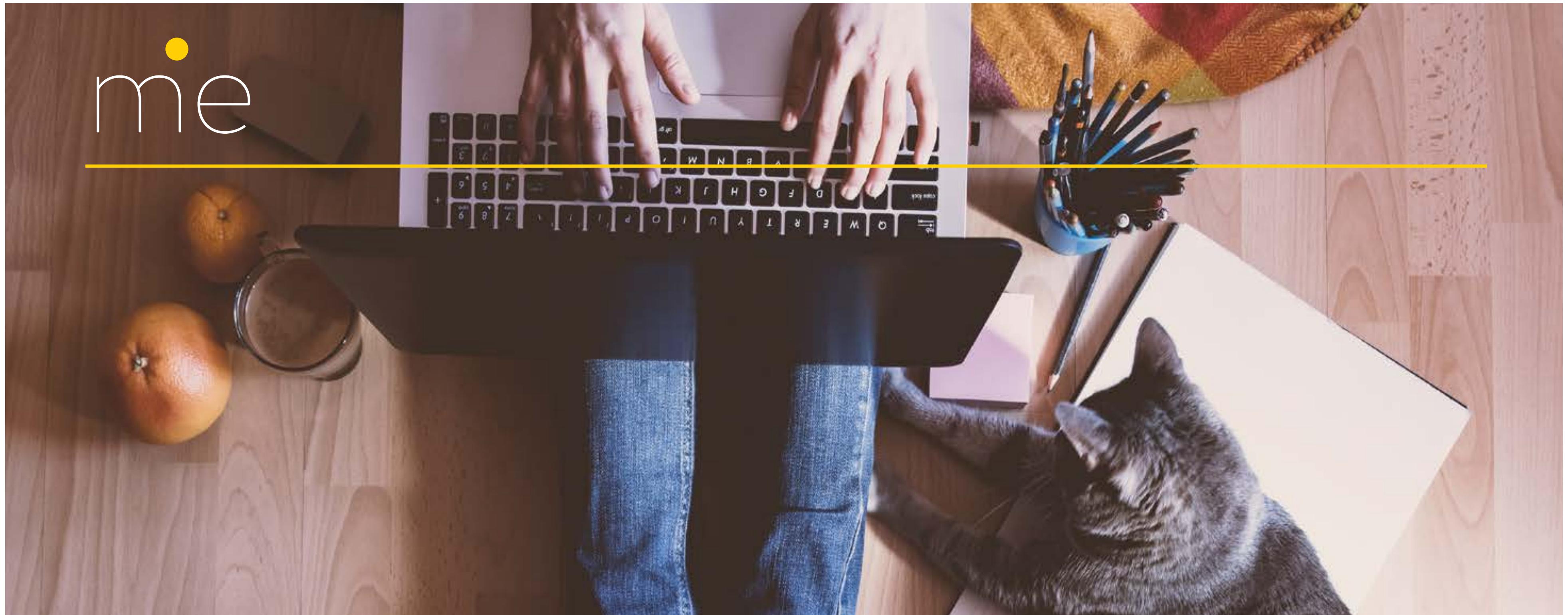
But you need big chunks of time to eat that frog. That's what makes it deep work, it's the stuff you really need to sink your teeth into and wrap your head around. Shallow work, on the other hand, is the small day-to-day stuff in between your big tasks—it could be an email worth a quick response, an admin phone call or scheduling a meeting. It's easy to get distracted by shallow work because they're quick and easy tasks that give us a sense of accomplishment.

**It's important to remember three things:**

- 1)** your day will consist of both deep and shallow tasks,
- 2)** your brain will naturally lean toward shallow work to procrastinate, and
- 3)** you're likely better off if you start your day eating that frog. So, build this time into your routine and make sure you let others know when you're tackling a deep work task and not to be disturbed.

## Example:

Many of our team members block off times in their calendars for deep work. They build it into their schedules and, unless it's an emergency, people respect that. It means we get more work done because we prioritise the work.



## Building Trust & Reliability

Answering your emails or messages quickly can give others the impression that you're reliable and available. But what's more important than instantly answering emails and chats is striking a balance between being reliable and having distraction-free work time.

If you're not working, why pretend to work? It's better for everybody if you measure your value and input, not the hours you've clocked in. We all need to give ourselves regular breaks, physically and emotionally—else we risk burning out from the very same modern working practices that promote and promise a healthier way of working.

### Example:

We did a project in Benelux for a large industrial company, helping their sales team reduce their admin to increase time at customers. They created a team agreement that nobody needs to respond to emails after 6pm. This helped the team achieve better work-life balance because they weren't worrying about letting others down by not responding immediately or that they were losing out on possible advancement by appearing unmotivated.

## Time-chunk Your Day

Think of your day in terms of units and break it up into chunks. You'd be surprised what can be achieved in 15/20 minutes of focused attention or conversation. An eight-hour work day could contain 32 units or chunks of time. Think about your meeting structures and agendas carefully and dedicate shorter periods of time to them. You only really need to dedicate one or two units per meeting, briefing or call.



## Learn Your Tools

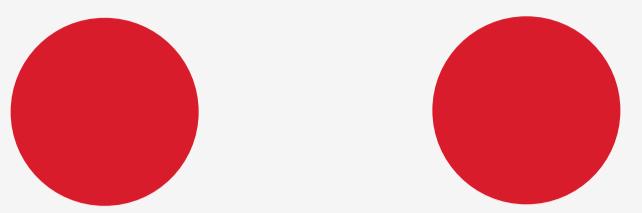
When email first came out, it was used like letters. Secretaries would print them out, the managers would write a response on the document and then it would be recaptured and emailed back by the secretary.

We use new tools in the same ways as the old ones, without really understanding how they do things differently. We naturally stop learning when we master, not what the tool can do, but when we know how to do what we used to do before. This is like getting a cement mixer, not turning it on and mixing the cement by hand inside the drum.

It's important to understand the potential of the various tools you use—even the parts you don't think you will use. Learning everything from inbox automations to using the full functionality of conferencing and collaboration platforms can really increase your productivity.

**“We like to give people the freedom to work where they want, safe in the knowledge that they have the drive and expertise to perform excellently, whether they are at their desk or in their kitchen. Yours truly has never worked out of an office, and never will.”**

- Sir Richard Branson



# we MASTERING REMOTE SOCIAL INTERACTION

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**It's difficult to gather around a virtual water cooler, but remote teams can do a lot to enhance their teamwork and create a good psychological environment that fosters interaction and creativity.**

Part of creating seamless chemistry with your remote team is about learning how to work together.

Some basic guides and collectively agreed upon rules can help the team navigate the tricky waters of virtual team communication. Too many team breakdowns happen over small, avoidable things.

## Stick to Etiquette

Communicating through text, voice and video is hard. You can't really see body language or non-verbal cues and you don't know what's going on in the life of somebody on the other side of the chat window. You have much less insight into someone than if you're around them in an office all day.

An etiquette agreement can help make sure that the message you intend to convey is received the right way. Etiquette addresses things like navigating cultural differences, being on time, acknowledging receipt of information, politeness, and sensitivity toward your colleagues, and most importantly, empathy. Think of it as the “don’t eat other people’s food” rule in the company fridge—small, obvious, but potentially disastrous if not said aloud.



Etiquette agreements can make things clear with guidelines like “don’t respond to your emails while in a meeting”. It can answer questions like “do you start every email asking how the person is or can you get straight to the point in the first line? How about office humour—is it acceptable to make jokes about somebody else’s beliefs? (Hint: it’s never acceptable. Unless they’re saying that Yoda isn’t the best character in Star Wars—in which case, go for it). Are spelling and grammar important to your team? How about rules around the use of exclamation points and capital letters?

These are small issues but they make a big difference when working together in a team especially across age groups and diverse cultures. In order to operate as a team and get things done quickly and smoothly, it’s vital that everybody knows the rules of engagement and sticks to them.

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## Share Your Schedules

Just because you can’t see somebody being busy doesn’t mean they’re slacking off. Team members should be good at sharing calendars—when they’re at meetings, when they’re offline or unlikely to respond, or when they’re working on a deliverable and shouldn’t be disturbed. This helps everybody understand what the team’s availability is. This also means that you should check a member’s calendar before calling them. And if it’s urgent, send them a message and wait for a response.

## Default Meeting Length

Most calendars will default to 1 hour for a meeting, and most people subconsciously book a full calendar hour slot—no matter the meeting type. Most people will then subconsciously fill that time talking.

Be conscious of how long you need to discuss a topic—it may only be 10 minutes. A team can achieve a lot of efficiency just by changing default meeting length to 30 minutes or less.

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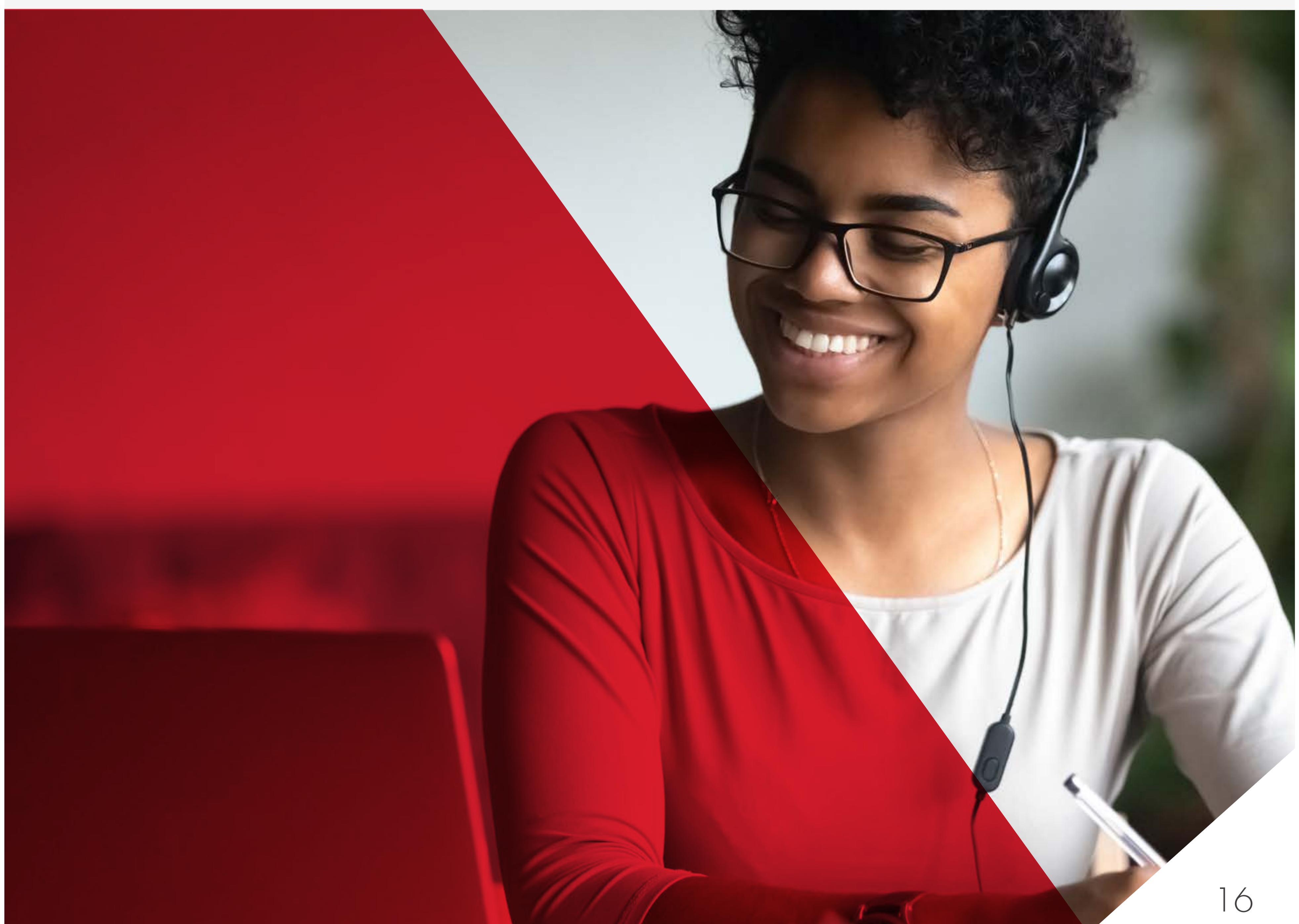
## Not Everything Is a Video Call or Voice Conference

When people start working remotely, the first thing they experience is a big increase in calls and meetings. Just like in an office, there are so many ways to communicate that don't involve setting up a meeting. If what you're after is quick and just needs consensus, try a group message first (if you are on Slack or Teams). If everybody agrees, there's no need for a call. The same goes for input and feedback on a document—move to online collaboration using Office 365 or GSuite and you'll be amazed how easy and more effective it is for people to provide feedback on your documents.

## Facilitating vs Participating in Meetings

Remote meetings can be tedious, especially when they drone on for hours and are poorly facilitated (just like an in-person meeting). You can often get lost in the discussion and leave without a clear sense of next steps or actions, or have key people drop off due to network failure or time constraints.

There are some clear do's and don'ts for facilitating and participating in a meeting, which we listed below. Review our meeting formulas section to see some of the other ways you can collaborate.



## Participant Checklist

- Make sure you have a quiet place for the meeting.
- If you don't have the right software, download it before the meeting starts and learn how to use it.
- Have a good headset that is either plugged into your laptop or phone.
- Identify yourself and that you're present for the meeting.
- Use video if you have the bandwidth or for at least for a couple of minutes to say hi. After that, there is nothing wrong with doing the rest of the meeting in voice only.
- If you agree to a voice only meeting, be sure to check that your camera is off before you join the call.
- Place yourself on mute when you aren't speaking. Background noises can be disruptive and distracting.
- Repeat your salient or important points clearly to make sure people receive and understand what you're saying.
- If you can't stay on the call, let the facilitator know at the start of the call and send a message to the facilitator when you leave, don't disrupt the meeting to tell people you're leaving.

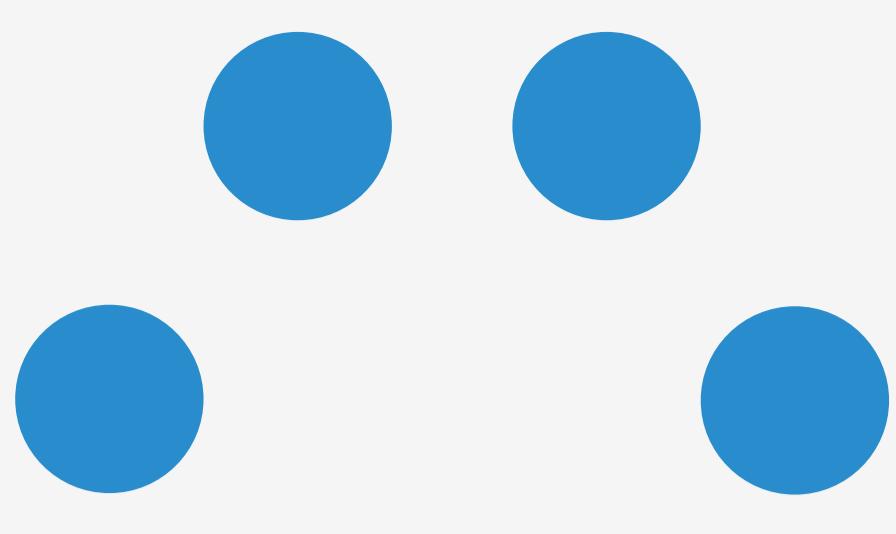
## Facilitator Checklist

- Send a clear meeting invite. Be sure to mention who is needed, who is optional or is receiving this as an FYI. Include the purpose or outcome of the meeting, and think about the time needed for the meeting. Put down the meeting etiquette as a reminder or include any other preparation people need to have done.
- Make sure you have a quiet place to have a meeting.
- Identify yourself at the start of the meeting and greet people as they join.
- Use video if you have the bandwidth or for at least for a couple of minutes to say hi. After that, there is nothing wrong with doing the rest of the meeting in voice only.
- Remind participants of the meeting etiquette
- Not all calls have to follow the same format. You can create different call formats for different types of meetings. For example, a decision making forum could use individual voting to show consensus (many online tools have this) and then a discussion. See our meeting formula section for ideas.
- Allow people to post questions as comments or in a chat window while the meeting takes place to avoid interruptions or people speaking over one another.

- Place yourself on mute when you aren't speaking. Background noises can be disruptive and distracting. Manage participants whose background noise is distracting using the messaging function versus shouting at them on the call. You can also just mute them as the facilitator.
- Repeat your, or others' salient or important points clearly to make sure people receive and understand what you're saying.
- Take thorough notes and create a detailed meeting summary or video recording to share with participants after the call.
- What's done visually after a meeting by looking for discomfort in your colleagues needs to be done more consciously in virtual meetings. Take the time to ensure that everybody's on board by checking in when closing a meeting.
- Ensure that there are clear action points from the call and these are sent to every participant.
- Think about whether you need to record the meeting for others who may have missed the call.

**“Great things in business are never done by one person; they’re done by a team of people.”**

– Steve Jobs



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# BUILDING A TEAM WHEN NOBODY'S AT THE OFFICE

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**Building and managing a distributed team is a daunting exercise that no manager has really been trained for effectively. We blunder through it and somehow make it work—but there really are better, more effective ways to do it.**

Modern team psychology research from Google, Harvard, Forrester and others has revealed a key (but obvious) element about effective teams: Their behaviors towards each other promote psychological safety. (You can read more about how to build psychological safety in our first book, [The Culture Canvas](#)). We won't go into all of the elements that make up psychological safety, but will focus on the importance of communication and working agreements to promote psychological safety and feelings of connection and belonging.



## Setting Expectations

If you have experience leading teams, you'll agree miscommunication is the number one reason things go wrong—and this is especially true for remote teams. Without additional sensory cues, remote communication can be a minefield.

As a team leader, what's obvious to you is often not obvious to everybody else on your team—things like quality of work and deadlines, how to take initiative, or which projects take priority. It's important your team is clear on the goals, timelines and priorities of a project or task, and have a shared area where your team can easily access this information. Where before you could deal with questions during a quick conversation or manage by walking around, these tools aren't as easily available, or quickly become overwhelming when you get too many call requests or messages.

## Creating Context

Unfortunately, as a team lead you need to ensure that task management and task context is at a higher level of quality than at the office. This means better information sharing practices (common folders, clear naming convention for documents, task management tools with clearly understood templates). The admin of ensuring its easy to find information becomes a critical task for the team's success.



## Motivation & Feedback

Good managers not only set the pace for employees but can also motivate their team by helping them set goals and establish benchmarks so they know if they're meeting (or exceeding) expectations. It's a good idea for team leaders to have regular check-ins and one-on-one calls with each member to make sure they're on track and getting the feedback they need.

**If you've led teams before, you'll know you get far better performance from your team members by praising them.**

In a traditional office setting you might communicate praise with a smile, handshake or pat on the back. In a remote work setting this could be a positive @ mention in the group Slack channel, a shout-out in the weekly stand-up or simply comments on the shared document.

Giving critique and feedback is also important. Where you may have delivered this with sensitivity in a meeting, it becomes much harder to do in text or even on a call. Feedback should therefore either be task specific (again, using the right tools it's easier to highlight issues and tasks) or either via Direct Message for small things or in a one-on-one video call format for significant issues.

## Working Agreements

Every team has a unique way of communicating and working together. And each team has a particular combination of personality types. Creating a basic set of guidelines helps to minimise misunderstandings, communication breakdowns and unnecessary frustration.

The purpose of a working agreement is to make sure the whole team shares the responsibility in defining expectations for how they will achieve their common goals. This brings everybody onto the same page and helps those involved stick to the guidelines.



# Urgency

You're used to walking up to somebody to get an answer but now you've sent them a message or an email and... nothing. Reaching an agreement regarding how long people will take to respond before you escalate, and how to deal with urgent requests, helps to clear up a lot of frustration in the team.

## **Example:**

- Our internal agreement is that if it's urgent WhatsApp the person and, if you get no response within the hour, call them. It means fewer WhatsApp messages, and team members know if they are getting an unscheduled call, it's likely to be urgent.

# Stop Doing

Guidelines should include rules around what to stop doing too.

Knowing what not to do can lead us to doing the right thing. If we know not to present a problem without having some kind of solution, the obvious first step when we encounter the challenge is to start investigating some solutions. This simple rule could have a big impact on your team's attitude and how they approach work.

A to-don't list includes things that your team should avoid doing because they're time-wasters, bad habits or things that prevent the team from meeting their goals. This list could include things like: don't speak over one another in calls, don't call someone out on a public forum or don't hit 'reply all' on emails.



## Remote Working Policy

If you need it to, the working agreement you settle on could serve to inform a formal HR company policy around how you work with remote employees or teams alongside other policies like data protection and use of social media.

## Make It Your Own

There is no rule book or formula for creating these agreements however your team decides to address your individual needs is up to your team.

**As long as the agreement is accessible to everybody, easy to maintain, and used by everybody on the team, the power of the working agreement will be a big plus in team performance and culture.**

# TEMPLATES & FORMULAS

## CREATING A REMOTE TEAM AGREEMENT

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**To successfully build work culture remotely, we need to get buy-in from our remote team.**

We've identified 7 aspects all teams face in settling on an agreement. If we resolve the obvious, but often overlooked, challenges from the start, it saves time, energy and frustration further down the line. This makes the team function better, allowing us to get the job done with better results.

The agreements are either small or simple, and often both, and are designed to be actionable right away. There is no need to change everything you do, or to learn a new 'collaboration language' before getting started.

As new members enter a team, as your team grows, or once every few months, it would be a good idea to revisit and review the team's work agreement to make sure it is still relevant and working for your team.

# REMOTE TEAM AGREEMENT TEMPLATE



## ETIQUETTE:

What are the social interaction rules when working remotely?



## RITUALS:

What do you do as a team to feel connected and aligned?



## DECISION MAKING:

How do you make decisions as a team, how are they communicated?



## TASK MANAGEMENT:

How do you ensure everyone knows what they need to do and what the rest of the team is doing?



## TOOLKIT:

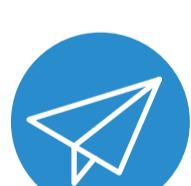
What tools do you use as a team?

## CONFERENCING:

## DOCUMENTS:

## MESSAGING:

## CALLS:



## INFORMATION SHARING:

How do you share information, on which platforms, what formats, naming conventions etc.

## PLATFORM:

## TYPE OF INFO:



## STOP DOING:

Are there any habits, ways of communicating or ways of working that should stop?

# ETIQUETTE

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Have you ever been offended by an email that seems cold, short, too straight to the point—only to learn later that's just how the sender writes? How about those annoying one-word responses from somebody who hit 'reply all'?

Without the natural rhythms and routines developed in an office environment, it can be tricky to figure out how you work together—things like the best time to schedule team meetings or acceptable turnaround times on responses. It helps to have rules to clear up how you and your team engage with one another.

- How late is 'too late' to join a call?
- Do you have to start every email with "hello, how are you?" or can you dive right to the point?
- How do we communicate across different time zones? What are our common hours or which time zone do we choose to work in?
- What channel do we use in case of an emergency?"

## Example:

We don't need pleasantries on internal emails and getting straight to the point is OK on all platforms. Don't use email unless it's for external people, internally we only use Slack. Expect a response to a message within the same day or escalate it if urgent by using WhatsApp. Stay on mute on calls, ask questions via chat and let facilitator do their work.

# RITUALS

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A large part of any culture is built around routines

The same way you might sing and share cake to celebrate a birthday or get together on a Friday afternoon for drinks, it's important to do things together as a virtual team.

- What can we regularly do online together as a team?
- How can we encourage team participation in social activities online?
- How do we represent ourselves as a team to other teams in the organisation?

## Example:

We have a 'coffee break' chat channel open to everybody for one hour every morning dedicated to casual chats. At the end of each project we get together for a team dinner. For birthday celebrations each team chips in for a digital gift and has it sent to the person celebrating.

# DECISION MAKING

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There are unique challenges that come with making decisions as a distributed group.

Discussions are unstructured with a lot of back and forth and no good way to track consensus. Even worse, requests for feedback can go ignored, or with only a few stakeholders raising their voice. What is your process for remote decision making? It's important to know what format to use for your various meeting types.

- Does being remote change the way we make decisions?
- How do we ensure we are being inclusive?
- How do we make decisions on the fly, especially when we want everybody's input on the decision?

## Example:

We build consensus by sharing our work with the relevant people and allowing them to comment (in the doc) or ask for a call if they need more information. If we need to make a group decision, we use a vote. Approval needs to be within the digital tools so we can track feedback.

# TASK MANAGEMENT

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It's harder to keep track of who is doing what, by when, and how far along they are when you can't just pop by somebody's desk.

Using digital task and project management tools are great, but there needs to be a clear understanding of how they will be used:

- Who is responsible for updating the status of their tasks?
- How often do task updates happen?
- Where do you do the updates?

## Example:

We use Asana for task management. You are responsible to update the status of your tasks as you go. Nobody will run after you, so unless the task is marked as done, we assume it is incomplete. We treat deadlines and quality seriously so if you are going to be late on a deadline, let the project lead know as soon as possible.

# TOOLKIT

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Have you ever sat through the first 15 minutes of a call as people struggle to join in?

You can simplify this by agreeing which tools you use and for what purpose. Make this easy to understand so that everyone knows what they should have on their machines and phones to more smoothly manage meetings.

- What features do we need our communication tools to have?
- Do we need tools for project management or socialising or creative reviews or more?
- How can we get everybody on board and excited to use the tool we choose?

## Example:

We hold calls internally on Google Meet. For sharing documents, we use Google Docs. For Messaging, we use Slack (sometimes for small impromptu calls too). For external calls, we use Google Meet or Zoom, but we're always very clear in the invite about which tool we're using and be sure to include the meeting link, too.

# INFORMATION SHARING

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It's frustrating for anyone not having the correct or current version of a document—reduce confusion and get everyone up to speed by making sure everybody has access to the right information at the right time.

- How will we share information and progress?
- Is there a common folder everybody can work in, is there a directory structure? Naming convention?
- How can we ensure the information sent out has been successfully received?
- How do we take notes and share them?

## Example:

We create a channel per project in Slack and only invite the team members. Documents are referenced from Slack via a link but are stored in Google Drive under the project folder (client/project). Where possible we use an online doc so everyone is on the latest version, we reshare the link for convenience. We have short weekly standups per project (no more than 30 min) but otherwise we do work reviews as needed.

# STOP DOING

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It's said that a sculptor creates a beautiful statue through a process of chipping away the parts of the marble that aren't needed.

Consciously or unconsciously, what's holding you and your team back from reaching your potential?

What could you chip away to make your remote team more efficient?

- What do you and your team waste the most time on?
- What bad habits have you picked up as a team?
- What do you wish your team didn't do anymore?

# MEETING FORMULAS

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Nobody appreciates a meeting that could have been an email.

On the other hand, nobody likes to miss important information lost deep down in an email thread. It's important to know what format to use for your various meeting types.

- What kinds of meetings do we regularly have?
- What tools could we use to facilitate these meetings?
- What rules of engagement do we want to follow that makes the meetings more effective?

## **Example:**

We have an active kick-off to do project planning. It's a regular format where the project lead brings the team together. We all have Asana open. The lead explains what needs to be done, the team asks questions and then each person fills in their own tasks during the workshop. Once we have finished, we run through and tweak the tasks to ensure the plan works. Job done!

# HOW DO YOU DO IT?

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**This Remote Team Agreement  
is a roadmap for you and your  
team to build on.**

The blocks are in no particular order but each block is just as important as the others. In each block there is a space for you to fill in your choices and preferences in collaboration with your team.

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Are there any habits, ways of communicating or ways of working that should stop?

# TEMPLATES & FORMULAS

## CREATING TEAM WORK AGREEMENTS

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**This doesn't have to be a cringe-worthy meeting or a virtual fist fight.**

This can be done via a call (for a small team of less than 30) with everyone talking through and agreeing on the guidelines. Or potentially a management team or representative body of staff could build a basic set of guidelines that people can later collaborate on.

In the Remote Team Agreement, we have provided a series of questions and a structure to help you create working agreements with your team. We have found these useful, you may want to add or delete some.

We have also added a 'recipe' for how to run an agreements collaboration, to give you some ideas about how to do this effectively.

# FORMULA NAME: SETTING WORKING AGREEMENTS

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## EXERCISE OUTCOME:

To agree on how the team operates remotely.

### DURATION:

60 min for a team less than 8 people.

### NUMBER OF PARTICIPANTS:

Depends on the size of your team—ideally everyone should attend but possibly just team leads for larger teams.

### TIMING ADJUSTMENT FOR MORE PARTICIPANTS:

Teams of more than 8 people may require 1.5 hours.

## TOOLS REQUIRED:

Web conferencing tool and a collaboration platform that supports stickies and voting.

## PRE-MEETING PREPARATION:

Team should have read ME.WE.US before the meeting. It's helpful to also prepare a collaboration template for your team to use. This Template can either be shared ahead of the meeting or can be put up on any collaboration platform Looks slightly messy - maybe (such as Google Docs, Office 365, Lucid Chart or Slack).

## MEETING PROCESS:

TIME REQUIRED:	ACTIVITY:	DESCRIPTION OF ACTIVITY
0 - 05 min	Start	The meeting facilitator sets the scene for what will be done in the session.
05 min - 15 min	Check-in	What are your concerns about this session?
15 min - 25 min	Participation	Each participant goes to the first block selected and puts down stickies on the shared document with their thoughts.
25 min - 35 min	Discussion	Discussion and selection of agreements.
35 min - 65 min	Finalising	Now you're familiar with the process, the next blocks shouldn't take as long to fill in. Take 30minutes to fill in the remaining blocks and discuss and select your agreements.
55 min - 70 min	Closing	<b>Once you've settled on your agreements for each block, make sure the final version is shared with your team and accessible to them at any time.</b>

# TEMPLATES & FORMULAS

## MEETING FORMULAS

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Sometimes the best way to manage remote work is not to have a call, but a collaboration.

The big context shift is that if people were sitting in a meeting they were away from their workspace, so all they could do was talk—while in an online collaboration, everybody is sitting at their workspace. This means they can do the work DURING the collaboration, not after the meeting.

Changing how you use the meeting time allows you to achieve much more because you can customise the format of the meeting for the outcome you want.

Below are a list of meeting “formulas” or ideas of how you can set up different types of online engagements.

# FORMULA NAME: STATUS UPDATE

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## EXERCISE OUTCOME:

To align the team via updates on progress, challenges, and next steps

### DURATION:

30 min

### NUMBER OF PARTICIPANTS:

Any

### TIMING ADJUSTMENT FOR MORE PARTICIPANTS:

Over 10 add 3 min per participant, or per 10 tasks over 100

## TOOLS REQUIRED:

You need to easily collaborate on a list of tasks with status and short descriptions. This can be done via a report from your project software, excel 365, sheets, airtable or many other platforms.

## PRE-MEETING PREPARATION:

Publish the status report at least a few hours before the meeting so there is no time wasted. Ideally share it with the meeting request.

## MEETING PROCESS:

TIME REQUIRED:	ACTIVITY:	DESCRIPTION OF ACTIVITY
0 - 2 min	Start	The team facilitator starts the meeting reminding everybody to review the etiquette rules and agenda.
2 min - 15 min	Review	Each person reviews the list and highlights what they want to speak about/know more about. Each person's highlight should be clear. Where multiple people want to know about a task use upvotes or comments.
15 min - 45 min	Discuss	Facilitator runs through the most voted on issues, team discussion and decision making as needed. Decisions are documented in a status report on the status report if possible, or in a separate document that can be shared easily and converted into tasks. Each task has a person responsible and next step.
45 min - 55 min	Final issues	Facilitator reviews progress, asks for any pressing issues still not addressed in the meeting to be resolved. Items not discussed but not burning issues can either be dealt
55 min - 60 min	Closing	

# FORMULA NAME:

# CONSENSUS BUILDING

## EXERCISE OUTCOME:

To build consensus within a team by getting early feedback.  
This is aimed at a structured document, creative work or plan.

DURATION:	NUMBER OF PARTICIPANTS:	TIMING ADJUSTMENT FOR MORE PARTICIPANTS:
45 min	Any	None needed

## TOOLS REQUIRED:

Conferencing Tools with screen sharing: Teams/Slack/Skype/Zoom.  
(office 365, Miro, Google Docs)

## PRE-MEETING PREPARATION:

Facilitator sends invite to meeting either with document attached for discussion or to be provided on the day of discussion.

## MEETING PROCESS:

TIME REQUIRED:	ACTIVITY:	DESCRIPTION OF ACTIVITY
0 -10 min	Start	Faciliator provides context but DOES NOT read through or provide the document. Context should provide background and why this is important.
10 min - 20 min	Review	Participants read through the document/presentation and make comments as they proceed. comments should be visible to everybody, upvote or +1 on comments you agree with.
20 min - 40 min	Discuss	Facilitator starts discussion based on most commented on issues. suggestions are logged on document.
40 min - 45 min	Final issues	Wrap up and next steps by facilitator.
55 min - 60 min	Closing	

# FORMULA NAME:

## BRAIN STORMING

### EXERCISE OUTCOME:

This formula is aimed at facilitating a structure brainstorm as a team. The process takes the team through creating multiple options and consolidating into the best few through using “wisdom of the crowd”

DURATION:	NUMBER OF PARTICIPANTS:	TIMING ADJUSTMENT FOR MORE PARTICIPANTS:
70 min	Any	

### TOOLS REQUIRED:

Video Conferencing: a tool that supports breakout rooms like Zoom, or Teams/Slack

### PRE-MEETING PREPARATION:

Send meeting request with attached/links the relevant background information required. Prepare a shared excel/sheets with the selection criteria for the ideas generated in the brainstorm (e.g. market impact, cost to implement, revenue opportunity etc) and the ability for each participant to vote.

### MEETING PROCESS:

TIME REQUIRED:	ACTIVITY:	DESCRIPTION OF ACTIVITY
0 - 10 min	Start	Facilitator provides context to the challenge and explains the agenda for the day. Identifies weak technology users for additional support. Separates the participants into smaller teams to brainstorm many ideas.
10 min - 30 min	Brainstorm	The teams break away into their own sessions and list all of their ideas. This is done onto the same sheet as the other teams (i.e. everybody is adding ideas to the same document).
30 min - 45 min	Present back	The participants return to the same call and vote on the ideas listed under the selection criteria.
45 min - 55 min	Discussion	Any idea which score in the top 25% but had some outlying voting (i.e. somebody thought it was bad, everybody else thought it was good), is discussed in more detail to understand if the dissenting voice knows something the others don't.
55 min - 70 min	Final issues	Top ranked ideas are discussed in more detail and final selection made.
55 min - 70 min	Closing	

# FORMULA NAME:

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## EXERCISE OUTCOME:

DURATION:

NUMBER OF  
PARTICIPANTS:

TIMING ADJUSTMENT  
FOR MORE  
PARTICIPANTS:

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## TOOLS REQUIRED:

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## PRE-MEETING PREPARATION:

---

## MEETING PROCESS:

TIME REQUIRED:      ACTIVITY:      DESCRIPTION OF ACTIVITY:

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