



# REMOTE WORKFORCE PLAYBOOK

**Lead your team from  
virtually anywhere**





**As your team transitions to a virtual environment, the way you work, live, and interact with others has changed. From a team who has been working remotely for 19+ years, this playbook is our guide to leading and succeeding from anywhere, no matter the circumstances.**

## **NAVIGATING THE DAY-TO-DAY**

### **Ditch the PJs**

While lounging in sweats can be tempting, it's best to treat your day as if you're going into the office. Shower, make coffee, get dressed. Develop new routines that kick your body into work mode, not sleep mode.

### **Create a Comfortable Work Space**

Avoid bouncing from spot to spot around your house. Designate a specific work zone based on what you need to be most productive -- whether that's a quiet spot or the one closest to the coffee machine. Set up a makeshift office space that is comfortable and free from unnecessary distractions.

### **Get Extra Engaged**

With less opportunities to talk to your team, proactively let them know your priorities and project timelines. When you are in meetings, make an effort to be engaged and try to be extra responsive to calls and emails. You don't have to feel chained to your desk, but your team should feel like they can reach you in a timely manner.

### **Set Your Limits**

The line between work and life can get blurred when both are in the same space. If you can, set limits with your family so they know when you need undisturbed working hours. Conversely, block your calendar so your teammates know when you need to step away from your desk and when you plan to be done for the day.

### **Give Yourself a Break**

Let your remote work lifestyle mimic the natural pace of office life. Give yourself time in the morning to settle in, take a break every few hours, and close your laptop at the end of the working day.





# INTENTIONAL COMMUNICATION

Without face-to-face interaction, it's more important than ever that you be very intentional in your communication. While you may not use the exact technology solutions listed below, you should have a tool in place to facilitate the following types of interactions. Make sure each tool serves a specific purpose that is understood across your organization.

## INSTANT MESSAGE



Microsoft Teams

The virtual version of dropping by a co-workers desk is an instant messaging platform like Teams. It works best for quick conversations that don't require an email. It seamlessly integrates with your email, calendar, and SharePoint documents. Plus, it lets your team know when you're active on your computer, away from your desk, or in a meeting.

## CLIENT COLLABORATION



It's imperative to have a platform that connects your clients and team members. With Zoho Connect, each client has a designated page where they can collaborate with their team, get feedback, and share updates on activity. You can build out pages for your internal team too to share company updates and more.

## EMAIL

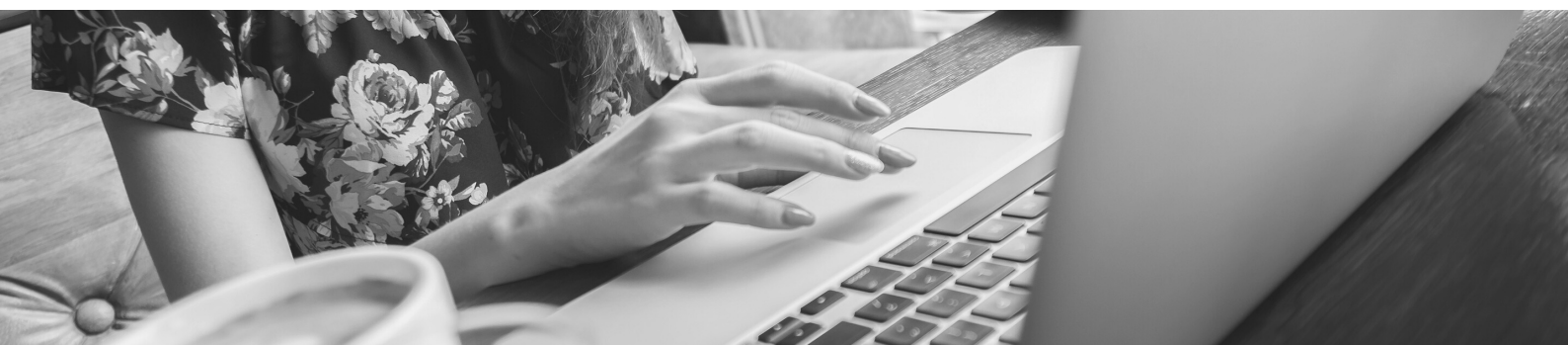


Having multiple communication tools should clear the clutter from your inbox. Email should be reserved for interactions that need a paper trail, contain action items, or are sent to a large group.

## VIDEO CONFERENCING



While some of the tools listed above offer video conferencing capabilities, it's best to have a designated platform for internal and client calls. With Zoom, you can set up meeting IDs for every call and recipients can easily access them from a calendar invitation.





# HOW TO HOLD EFFECTIVE VIRTUAL MEETINGS

Conducting all of your meetings over video may feel out of the ordinary right now, but you may actually find your team to be more productive without the distractions of a meeting room. Being able to share your screen, make changes to documents, and pull up reports during the call ensures everyone is focused on the same thing.

**01**

## AGENDA

If you want your meeting to be productive, set an agenda beforehand and verbally go through the checklist during the call. If you have a lot to cover, it may be helpful to set a time limit for each topic.

**02**

## VIDEO

Face-to-face contact is essential to preserving a human connection and catching those non-verbal cues. Turn your video on for calls whenever possible. It's awkward if you can see others but they can't see you.

**03**

## LIGHTING

Keep your source of lighting in front of you rather than behind you by positioning your desk in front of a window or having a light source behind or to the side of the camera.

**04**

## SOUND

Avoid using the audio from your laptop directly. Get yourself a good headset or earphones to limit background noise. It may be helpful to dedicate a quiet space in your house just for taking calls.

**05**

## BACKGROUND

Try to position your desk so that you have a neutral background that won't be distracting. If there's a chance a person or pet may get in the way, consider some of Zoom's virtual background capabilities -- but don't go too crazy with it.

**06**

## NOTES

The great thing about video conferencing is you can take notes without distracting from the meeting. Even better, Zoom lets you take a transcribed recording of the call that you can refer back to later. You can even record calls of yourself to use as training tools for your team.





# LEADING A REMOTE TEAM

If remote work has become your team's new normal, your focus as a leader should be to maintain your company's vision, build a sense of community, and help your employees adapt and thrive individually and as a group.

- Show empathy for each team member's unique situation. Take extra time to check in and see how each person is being impacted by the current situation and how it may affect their work.
- Over-communicate across multiple channels, and then do it again. As things change day-to-day, you can lessen the ambiguity by regularly updating your employees and ensuring them that you're aware of their needs.
- Focus on outcomes rather than activity. Your team may not have uninterrupted availability during regular working hours. Give them a break and show appreciation for their achievements, not their time.
- Have a little fun and stay positive. With everyone working from home, you'll likely get a little peek into each other's personal lives. Take this time of connection to share stories, introduce a child or pet, start a book club, share a playlist, and lean on your company culture.

## TIPS FROM OUR CEO

**01**

### REACH OUT EVERYDAY

When your team can't physically see you, find other ways to be seen. Post regular state-of-the-company updates on your portal, send good news via email, record yourself on video acknowledging achievements. Communicate through multiple channels so they feel your presence.

**02**

### ASSIGN A CHAMPION OF CULTURE

Appoint someone to bring the fun. At ML, our champion acknowledges every birthday and work anniversary with creative and highly personalized announcements. She also leads virtual holiday celebrations with games on Zoho and laid back video conferences to celebrate the winners.

**03**

### BE SOCIAL

While working remotely, work a little harder to get to know everyone on a personal level. Follow your team members' social media accounts if they are public, but recognize that not everyone is comfortable giving their employer access.

# WE'VE BEEN DOING THIS A WHILE

We took to Zoho to ask the [ML experts](#) how they thrive as a remote team and stay connected with each other and clients.



**Theresa Applegate**

I really love TEAMS. I feel that it is easier to reach out to co-workers more as if they were in the same location rather than in another state or country. We are all spread out in different time zones, and don't work the same schedule. Having that Green AVAILABLE indicator on someone's name to know when they are at their desk is so helpful. Red dot, I know they are in a meeting, and yellow they are away from their desk. The fact that we can call via voice chat from inside the app or share screen/camera instantly is insanely helpful. Being able to instantly see what someone is talking about or show someone something on your computer makes tackling some issues go a LOT faster. When you are relying solely on email there can be a lot of lag time between responses or more back and forth than just hopping on Teams and talking through a problem.



**Jennifer Aldinger**

I think the new "technology package" enables us to put our arms around ML. It is such an effective way for us to interact quickly and fully whether it is via Zoom where we can see and hear each other, through email, Zoho or Teams. All together allow us to be effective and efficient and get more done in less time without sacrificing connecting and collaborating with coworkers or clients. ML has even used technology to have fun and that is very unique!



**Stephanie Kargel**

Being connected to a client on Zoho has been such a positive change. In earlier years, the team did not interact with clients. So, if a question arose, we asked the Client services manager to ask the client and then waited for the response. Zoho communication has streamlined the process, and helped with information sharing as the client response is seen by the whole ML team.



**Leslie La Chapelle**

Being able to get to know the people I work with even if we work in different states. Some things that have helped me are the personal posts we can share on Zoho Connect. Also, the ice breaker questions at the beginning of our monthly operations calls.



**Ariel Rivera**

I actually find zoom meetings to be way more productive than in-person meetings. Not only do we save the time it takes to get everyone in a room, but we're able to share our screens and pull up documents when we need them. Virtual meetings are easier to keep focused on an agenda and makes note taking much easier too!





# ASK US ANYTHING

MarketLauncher is a 100% remote team because we know that top talent has no boundaries. As you transition to a new way of working, we want to help in any way we can. Please reach out if you're looking for additional guidance on how to lead your team from virtually anywhere.

## Get in Touch

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