

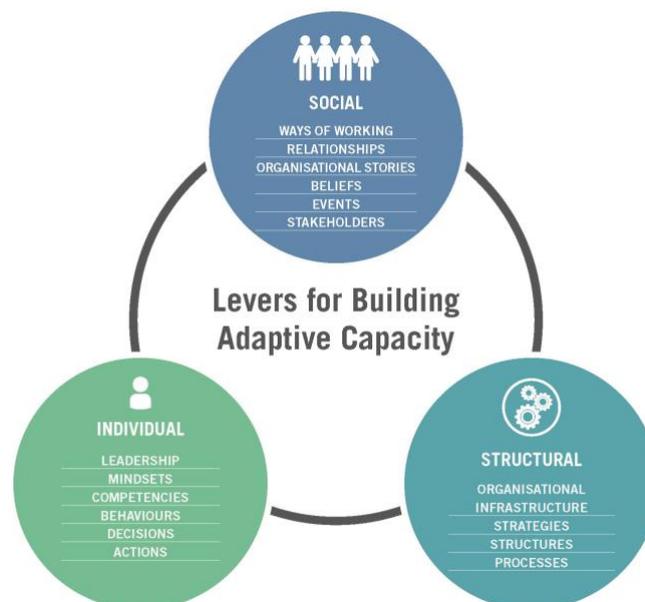
Remote Working and Virtual Collaboration

Working and collaborating remotely can provide wonderful opportunities for creativity and freedom. This happens through disrupting our existing ways of working, mechanisms and structures for sharing and collectively advancing work, and individual ways to contribute or take responsibility.

These disruptions can also be challenging for many, sometimes prompting a sense of disconnection, overwhelm or confusion.

As people and organisations learn to work differently through the time of COVID-19, as with any sustainable transformation, all three levers for building adaptive capacity need to be worked with in cohesion; Individual, Social and Structural. In working with our community and clients across multiple regions, through this time we have found that it is *even more essential* to take into account:

- **Individual needs:** understanding individual ways of working and the structure, connection, direction and development needs of each person.
- **Social alignment, connection and cohesion:** enabling psychological proximity; ensuring people feel close and connected to each other with a deep appreciation of what is important to each individual and the purpose of the group.
- **Structures to support virtual collaboration:** software and other tools that mimic or improve upon the intimacy, order, discussion and decision-making processes that exist in a physically proximate way of working.



Individual needs

Many people thrive on remote working. Being able to work from home can provide a sense of whole-life alignment and bring more of our whole selves to our work. This can create a deeper work focus and energy that has benefits to thinking, relating and productivity (at least in the short term). In our client surveys, we have seen perception of culture and levels of engagement can at times be significantly higher amongst people that have the capacity to work from home.

We have also found that as we all have different needs, life circumstances, skills and capacities, there can be a variety of challenges to remote working and collaboration.

These challenges can be amplified when we move from working remotely occasionally (in a way that suits our whole of life), to extended or full-time remote working.

While certain ways of working are able to be easily adapted to remote working, deeper collaborative work takes more thoughtfulness, intention and adaptive work to achieve.

Challenges of full-time remote working

The joy of choosing to work from home can be eroded over time, by a lack of physically proximate human connection. It is likely that what starts as a novelty can soon become a burden without recognition of individual needs and without paying due attention to deepening purpose and collaboration.

In cultures where hierarchical leadership has been strong, many people may prefer the structure of working face to face. If people haven't yet developed sufficient discipline or personal agency, they may find themselves getting distracted, compromised between other priorities, or feeling lost without the same level of direction or focus a workplace environment provides. This challenge provides an opportunity to develop greater independence and personal agency and yet to do this requires specific support, including personal development.

Even for people who are familiar with remote work and mostly work remotely, the COVID-19 situation is and is likely to have psychological impacts from decreased energy and motivation to more serious mental health challenges. What seemed important and meaningful a few weeks ago, for some may no longer have the same sense of urgency and purpose.

On the other end of the spectrum, those who are flourishing, energised and more purposeful right now, may find that sustaining this energy for a long period is more challenging. Many businesses are urgently attempting to pivot their business model overnight and whilst for some this can be energising and inspiring, there is also a need to pause, reflect and attend to wellbeing needs which can sit underneath adrenaline responses.

Workers on the "frontline" such as health workers will need additional psychological support mechanisms. So too will bankers attending to customers in financial distress and business leaders needing to close down operations or let go of staff. Our exposure to additional

challenges can have massive benefits in building resilience, innovating and building a new and better world, and for many may also come at a physical, emotional and psychological cost.

It is crucial not to judge as right or wrong, good or bad individual responses, and to deeply understand what each person needs in order to thrive. In addition to the social and structural suggestions described in the below sections, there are many things that need to be considered and worked through with people that you support (your teams, peers, friends, family members and broader community). For example:

- What support does the person need to be able to work most effectively?
- What is their current level of skill, will and confidence, and what does that suggest about their needs? For some people, it may be a daily check in. For others, it could be an ad-hoc sounding board for ideas or problem solving.
- How do you balance trust and discernment? For example, each person having space and time to adapt to a different way of working as well as support to check in regarding engagement, productivity and effectiveness?

Need for connection can vary for each individual. Explore specific software or hardware needs with each person to support them in maintaining connection with their stakeholders, customers, community and team.

Pulse Checks

Some of our clients are implementing pulse checks to understand how people are tracking. Some examples are:

- Sli.do
- Menti
- <https://www.qualtrics.com/here-to-help/>
- The poll function in virtual meeting platforms such as Zoom can also be useful for pulse checks

Social needs

Psychological proximity

Over the last weeks, we have seen beautiful examples of deepening human connection despite “social isolation” and remote working. From neighbourhoods singing from their balconies to acts of kindness for those more vulnerable, we have seen the deep instinct human beings have for staying connected.

While this guide shares a number of tools and ideas to support remote collaboration and virtual teaming, we would like to share one principle that we believe solves many of the so-called challenges of physical remoteness.

The principle is that with physical distance, we need a greater focus on deepening psychological proximity.

Psychological proximity is built when we work with and build trust, understanding, alignment, care, and kindness as the foundation for our relationships.

When we started working with global leadership teams, one of our questions was how well the work we did in adaptive leadership and culture would work with teams who weren't physically together very often. Through research, experimentation, and experience, what we realised is that it *can* work and is as essential to enable positive outcomes in remote or virtual working as it is when teams are co-located. We have also realised that without physical proximity, adaptive work requires even greater focus, discipline, and intention to bear fruit.

Culture, leadership and human connection are important when we are working with physical proximity. Without physical proximity, we need to double down on culture, leadership, adaptive work and connection and make this an even greater priority.

As you move towards remote working consider:

- *How can you generate greater psychological proximity, closeness, and connection with your colleagues?*
- *How might you apply the principle of psychological proximity with customers, clients and partners? With your family, community, and world?*

Perhaps as more people experiment with the power of focussing on human connection during the time of COVID-19, we will more deeply understand and pay attention to the power of human connection in situations where we have physical proximity.

Enabling psychological proximity through virtual meetings

Some ways that can be helpful in creating psychological proximity (in our experience) through virtual meetings or workshops include:

Beginning with presence

Provide a space that encourages deeper connection and awareness of self and others. We often invite people to close their eyes and take some deep breaths – slowing down and coming into their center, becoming present with themselves (physically, emotionally, mentally and spiritually) and then checking in with the group on how they are.

We then invite people to share their intention for how they would like to show up to be in best service of this group and meeting – what qualities of being will they be practicing?

Checking In

Check-ins are even more important in a virtual environment to enable psychological proximity. During COVID-19, people working from home may have children or animals with them. Allow them to share that. If kids are in the room, you can sometimes introduce them to the team.

Purposeful check-ins

During busy or disrupted times and especially for support team members who might not be as obviously “close” to purpose, purpose check-ins keep us connected to why we do what we do, deepening engagement, providing perspective and building resilience.

At our regular Adaptive Cultures team meetings our first two agenda items are:

- 1) **Social Check-In** (how are we and what is happening in our world)
- 2) **Purpose Check-In** (how are we consciously connecting our work to the higher purpose for Adaptive Cultures and how are we bringing the purpose to life). How are we seeing the purpose manifesting itself, what is emerging and how is it evolving?

Small groups; longer check-ins

Provide space for each person to check in verbally. The key is for check-ins to be concise yet meaningful. You might like to state a suggested time (1-3 minutes) for discipline.

Large groups; shorter check-ins

Check-ins can be done on the Zoom group chat with larger groups or with shorter check-in times. If you would like to keep verbal check in's with larger groups, consider using the breakout function for check-ins. This enables everyone to connect, listen and feel heard verbally without taking too much time away from other discussions. Key themes can be shared on the group chat after the break.

The difference between habitual and ritualised check-ins

Without presence and intention, check-ins can become formulaic and habituated. Instead consider the check-in as a sacred ritual and an opportunity to become present with self, other and the broader purpose of the group or conversation.

If a check in is becoming formulaic – change the check-in. Use relevant questions, ask people to share more deeply from a personal perspective and ask people what would bring greater presence and meaning to the check-in process. If check-ins go for too long or if time is not shared equally, people might start to check out. Ensure equal time for voices where this is reasonable.

Some examples of check-in questions:

- How are you today and what is happening in your world?
- What would be one word or phrase that could describe how you are tracking in the world right now?
- What is on your mind and in your heart at the moment?
- What are the crucial conversations we need to have today from your perspective and why?
- What are you most challenged by? What are you most inspired by?
- If this meeting was to be truly valuable to you, what would need to happen?
- What have you been reflecting on or learning about?

Reflection and Iteration

Practising ongoing reflection – continuing to iterate meeting effectiveness

As well as setting a clear intention and having a clear agenda ahead of the meeting, ensure you continue to check in using the group chat or verbally depending on time constraints on the technical AND adaptive aspects of the meeting.

Teams that we work with practice ongoing action reflection to iterate the effectiveness of their meetings over time. This requires collaborative muscles to be built, from self-awareness, to true care for the purpose, organisation, team, community and for each other and ability to lean into disagreement as well as “mining for common ground”.

Sometimes in early stages, teams designate one or two “balcony observers” these people ensure regular check ins and reflections throughout the meeting and have the task to take themselves off the “dancefloor” of the conversation and observe the quality and effectiveness of the conversation from a range of perspectives.

Often groups will set a timer for at least mid-way through the meeting to assess the meetings effectiveness, allowing for pivots or re-focusing where required. We suggest not waiting until the end of the meeting for a reflection moment or you may waste valuable time and allow for disengagement.

You can begin the process of reflection in the first part of the meeting (building listening and presence early) by asking the group:

- What are you observing in the shared themes that emerged during the check-in?
- What did you notice about the similar and different experiences that people are having?

Other questions that might support reflection and iteration through the meeting:

- How are we tracking?
- What are we observing about the conversation?
- Is there anything missing from the conversation?
- What other perspectives might we need to consider?
- How are we as a group inviting and encouraging diverse perspectives? How are building on each others' ideas?
- What is changing about our priority areas based on the direction of the conversation?
- Is this a conversation for now or another time?

Other resources:

Many agile ways of working are useful regardless of whether you are adopting “Agile” or not. Consider introducing virtual retrospectives into your team cadence. Basic instructions from Atlassian below:

- <https://www.atlassian.com/team-playbook/plays/retrospective>

Virtual brainstorming and idea generation can be less effective without the use of “sticky notes” and the energy that comes from physical proximity. Web based tools such as Candor can help de-couple idea generation from idea evaluation and enable teams to generate ideas offline and bring them together virtually for discussion and evaluation.

- <https://usecandor.com/>

Creating a virtual agenda

We have a “weekly meeting agenda” on our team collaboration platform with items to discuss at regular meetings. Ideally (we are not always as disciplined as we could be) each team member has added agenda items and assigned them a priority prior to the meeting.

Examples from our collaboration tool this week:

▼ This Weeks Agenda

	People	Priority	
Accreditation Webinars on Portal		Medium	
Webinar schedule		Medium	
People to support (external and internal)		High	
Trademark registering update		Medium	
Website Case Studies on Leadership, Engagement, Culture, Board, Risk etc to replace "pr..."		Medium	
Accreditation Process		High	
Set dates for Adaptive Cultures Team Offsites		High	
b.corp application		Low	

▼ Items for discussion at next Team Meeting

	People	Priority	
COVID-19 Travel response		High	
Offering additional support during COVID-19 - email mail out		Medium	
New Subscribers to Community Portal - process		Medium	
Whitepaper daily lists		Medium	
9lenses Diagnostic - items to discuss		Medium	

We often reconfirm or discuss our agenda at the beginning of the meeting and ensure we highlight key priority items. For example: if we only have one discussion today, what is most critical and why?

If the meeting is large, one person will work to pull a final agenda together, collaborating and seeking guidance from others where necessary.

On most team collaboration tools, questions, challenges or aspirations in regard to agenda items can be added by participants prior to the meeting. This allows discussions and perspective sharing start in the virtual space ahead of the meeting which can move thinking along as a collective in a highly effective way.

You can also add a column into your virtual agenda to indicate the purpose of that part of the agenda. For example:

- Philosophical discussion
- Gaining perspectives
- Make a decision
- Provide update or information

Often information that doesn't require input can be provided in a different format before the meeting.

Virtual meeting etiquette

In-person etiquette applies to virtual meetings and we need to pay even more attention to ensuring this. Many etiquette challenges are symptomatic of deeper adaptive challenges, for example: lack of awareness, purpose or discipline.

Rather than “fixing” symptoms with a technical solution, it may be useful to enquire into what is underneath the symptom. A couple of examples are explored below:

- **Presence is essential (means no multi-tasking).**

If people are not present, or are multitasking, it often means they do not see the value of the discussion (see other work as a higher priority) or are not being appropriately engaged. Ensure that you invite the people who need to be there, and that people are clear on how they can add and receive value from the meeting.

Some questions for reflection:

- How can you create a generative and engaged space?
- How can you enable shared responsibility and ownership for the value and success of the meeting?
- What is essential to discuss in this group and what could be taken on by smaller groups?
- What perspectives can be valuable

Behaviours and mindsets toxic to presence:

- Inviting people or not inviting people for political or self-interest reasons
- Not having a clear purpose for the meeting which all participants can align to
- Too many people or the wrong people
- Meeting too long or too short for purpose
- Lack of clear decision-making process
- Lack of listening and seeking to understand
- Lack of understanding of participatory decision making

Hear all voices

If you have invited someone to a meeting, ensure they have an opportunity to provide value, challenge and discuss. Help the group learn moderate this.

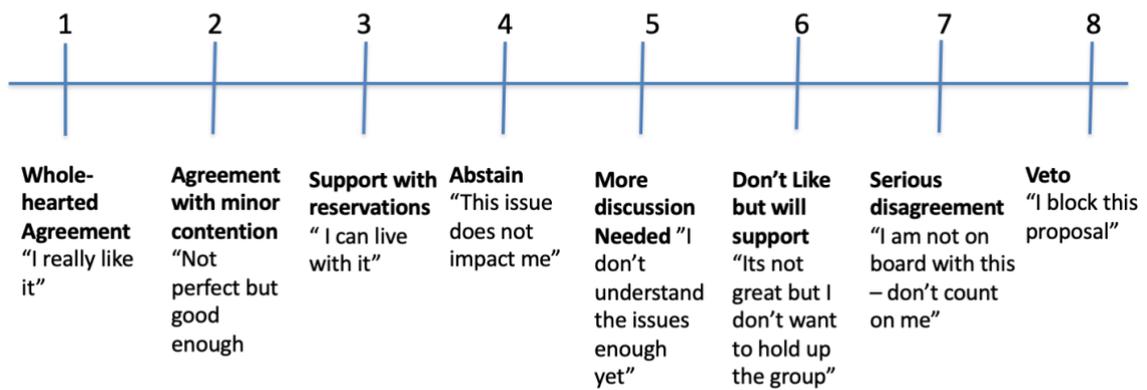
Resources:

You might like to ask one of your team to read *Facilitators guide to participatory decision making* - by Sam Kaner. Lack of discipline or understanding of how to get to good decisions

plague in person meeting and can cause even greater disengagement virtually. Many of the tools in this book are easy to apply virtually.

For example, the gradients of Agreement scale on the following page is a great way to engage people in a *real* discussion on how “bought in” people are to a decision and to prevent false agreement and to effectively work through blocks to agreement.

Gradients of Agreement Scale



Facilitators guide to participatory decision making - by Sam Kaner

Structural Needs

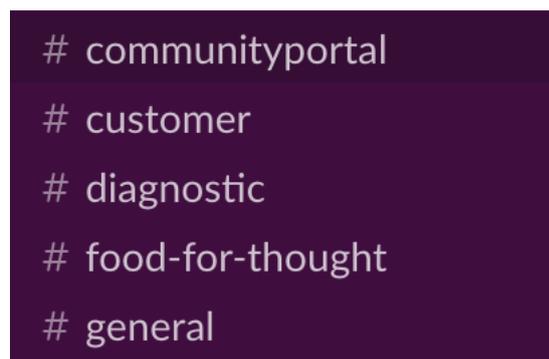
To enable the social intimacy and individual agency to effectively collaborate virtually requires technology that makes interaction straight forward and seamless.

Some ideas include:

Slack and other team communication tools

We use slack for ongoing team communication. Others use Microsoft Teams, Google Hangouts or other similar tools.

We use slack in addition to Zoom meetings, phone calls, text messages and emails to enable instant messaging and an easy environment to create and follow shared threads of thought. We have channels in slack relating to specific projects or day to day BAU aspects and also channels on purpose, our team culture, personal development and one called #random for funny messages, memes etc. The idea behind the channels is they each represent part of daily working lives, including the banter and humour that are so important in creating and maintaining connection and intimacy.

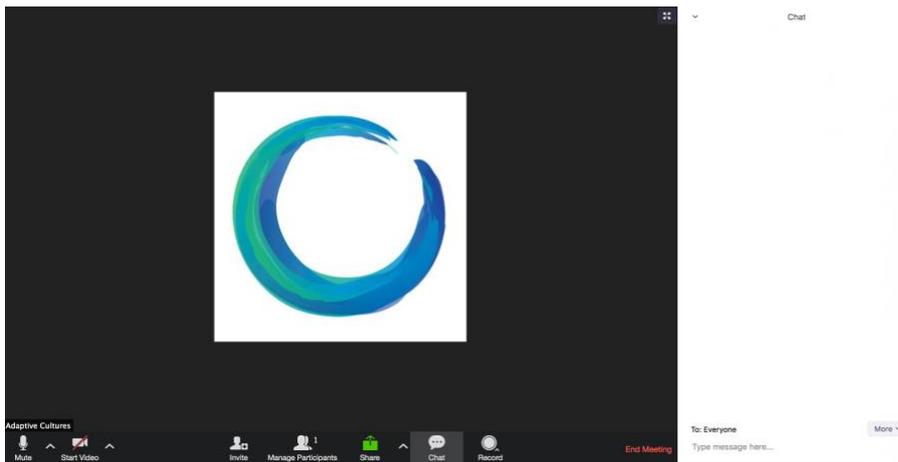


Setting a Zoom meeting up for effective collaboration:

We display a Zoom housekeeping slide at the beginning of group Zoom meetings, conferences and webinars and also include screenshots to show people visually how to access breakout rooms and chat functions.

Our housekeeping for virtual meetings and large virtual facilitations and webinars with Zoom:

1. Keep yourself on mute to ensure good audio quality (*6 if you are on mobile)
2. Any questions or shares in the chat box
3. IT challenges or need to join a virtual breakout? Select the private chat option and discuss with Adaptive Cultures in the chat
4. There will be times on the you'll be invited to discuss in a small group. If you are not physically with a group, you can be assigned into virtual breakout rooms. Please send **adaptivecultures** a message in the chat if you need to be assigned to a breakout room.
5. The slidedeck will be sent to you – focus on faces and discussions more than on slides



Using Virtual collaboration tools

Adaptive Cultures use MONDAY to compile our team agendas, keep track of our work, know where we are up to on each project, and who is taking responsibility for which steps. Any virtual teaming software will do including Trello, Microsoft Teams and others.

Technical Etiquette

There are times when a technical or obvious response is the right one. One of these is when there is too much noise on the call. Housekeeping and diligence regarding the “mute” function is the right response.

Mute and Unmute

Remind people to mute and unmute where necessary and in particular with larger groups or noisy backgrounds. Pay attention to people’s faces so you can see if they are talking while on mute (thinking others are able to hear). This is likely to happen pretty regularly at first.

Technical support person

When we are facilitating large groups virtually, we often ask someone to manage the “technical” aspects of the meeting (breakout rooms, virtual chat comments etc) so that a facilitator or convener can focus on the more adaptive aspects.

Conclusion

Working and collaborating remotely has potential to ignite another level of productivity and vitality. It can provide a space outside of the habitual constraints of organisational life and open up the opportunity for new rituals and ways of working to emerge.

This guide provides some suggested practices and tools – there are no doubt many more that people are using already. Please share with us so we can continue to develop this guide for the benefit of all clients and community members.