Hiring & Managing a Remote Team Checklist

Whether this is your first remote employee or your 50th, hiring and managing a team that spans beyond one office can be a challenge. This checklist is perfect for leaders who are looking to hire a remote employee/team or who have remote employees, but want to boost their program.

Hiring Your Remote Team

As with any employee, hiring the right remote worker is crucial to productivity and performance. Just like all other hires, how that individual is recruited and introduced to your company can also make the difference between a successful hire or a quick turnover. Here's your checklist for doing it right:

☐ **Give Your Job Posting Thought.** This is important in any job opening, but especially for remote work. An applicant should know what the job requirements, expectations and duties are before they even apply. It will be more challenging to train your remote employee on elements like internal process expectations, procedures and tool usage. Ensuring they understand what's expected within the role and as a responsibility of fulfilling it is critical to their success

☐ **Define Your A Players.** Take time to know what makes a successful employee at your organization and look for remote hires with similar qualities.

> **Remember:** There are a few additional traits that any remote employee should possess. For example, strong **communication skills** are pivotal when you don't work face-to-face with coworkers as well as **time management skills**.

☐ **Get the Right Video Interviewing Technology.** When you hire remote, you typically have the option to welcome people states or countries away from one another. This is great news because your next A Player could be anywhere in the world. However, that does pose a bit of a challenge for interviewing. Video interviewing tools provide an avenue for your hiring team to connect with quality candidates, no matter their residence.

> **Consider:** Video interviewing tools are better than basic video chat options because you can collaborate with the hiring team easier and manage candidate files right in the platform.

> **Bonus Points:** Schedule the team or department to join later rounds of interviews so candidates get an introduction to their potential coworkers!

☐ **Put Candidates to the Test.** Assessments are a great way to test the skills and abilities of your candidates. It won't guarantee top performance as a remote worker, but it will ensure they have what it takes to do the job right. Again, it's a little more difficult to know to train remote employees on some of the internal processes and procedures. Using assessments that ensure they have the right skills to do the job will help bridge the gaps in places where a candidate might struggle. In other words, assess their hard skills to ensure they can focus on the learning curve they will feel in working with a team at a distance.

> **Get Creative:** Some jobs require experience in soft skills that are harder to evaluate. For those roles, think about the daily job and how you can mirror it in a test. For instance, create a quick script that allows customer service applicants to perform a mock customer-facing call.

☐ **Communicate with All Applicants.** This is a basic rule that should be followed in all hiring, but can be harder to remember when it comes to remote employees who may have never stepped foot in your office. Do not leave applicants in the dark on your decisions. It's easy to be excited about those amazing candidates, but be sure to gently and kindly let those who didn't make it into the next round know that you appreciate their time and talent. These applicants could be your next great hire, but they won't want to work with you if the candidate experience is poor.

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Managing Remote Workers

After making the right hire, the work is not done. Even the best, most dedicated remote employees can be turned away by a management structure that fails to meet their needs or support their progress. This is everything you need to keep them happy, healthy and productive:

☐ **Get the Onboarding Process Right.** Those first few days of employment can make or break an employee's interest in the job. With remote jobs, this introductory period is just as important. In addition to coordinating training sessions and explaining processes, be sure to provide your new employees with…

- **Swag!** Get your new hires excited about being an employee for your company by providing them usables, wearables and any and all things your brand. (*Think:* pens, notebooks, chargers, t-shirts, stickers, water bottles, etc.)
- **Tools, Tech & Hardware.** Depending on your budget, that could mean sending a standard tech package to their remote office or offering stipends for the new employee to purchase their desired set up. Some organizations even offer desks and chairs to ensure workers have all they need to be their most productive.
- **Communication Guidelines.** How often should an employee check their email? Do they have set hours or is everyone on flextime? How can they contact superiors in emergencies? Expectations like these should be crystal clear on day one.
- **Meet the Team Catalogs.** This isn't necessary, but sure is helpful. Create a digital document of every employee within the organization. Include contact info, time zone info/location and desired form of communication. In fact, ClearCompany's built-in team page feature makes this easier than ever, and it's right within the talent management system.
- **Introduce the Workspace.** Remote workers have a variety of options when it comes to where they work, but that doesn't mean your organization shouldn't set a few ground rules. Will they be required to have a quiet space for frequent calls or will their independent work offer the opportunity to set up outside or at a coffee shop from time to time? Maybe your organization has a shared workspace for frequent or monthly meetings. Be sure to explain the unique structure of your remote options, expectations of remote offices and why they exist.

    Bonus Points: Create a How to Work for [Your Company] Guide that includes everything from the communication guidelines and team profiles to basic rules and employment policies. Also include a list of all your technology and a brief on how each should be used. This should be the cheat sheet to everything an employee needs to be successful at your company, so don't be afraid to explain little-known intricacies of your team. Don't waste paper and postage on printing the file. Instead, make it a digital document that any and every employee can find. That way it can easily be changed as your company grows or adjusts.

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☐ **Get the Right Technology.** Your remote team is going to rely heavily on technology to keep in touch. Be sure all the tools used are necessary and serve their purpose completely. At the minimum, all remote or partially remote teams need…

- Email/Instant Messaging
- A Collaboration Tool/Intranet
- Screencasting & Video Chat
- Cloud File Sharing

☐ **Real-Time Feedback.** Remote employees often work at different times than their teammates and leadership, so if any performance problems or mistakes arise, there's a chance they won't be able to discuss the issue as quickly as necessary if a meeting needs to be scheduled. Instead, have the team practiced in and receptive to real-time feedback. It allows employees to adjust their performance in a more agile and productive way. Real-time feedback should include positive feedback, appreciation and kudos too!
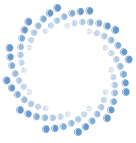
> **Note:** A cloud-based performance management tool will facilitate real-time feedback, goal alignment, performance progress, communication, transparency and so much more.

☐ **Regular One-on-Ones & Reviews.** Use these meetings to check in with employees. In the beginning of employment, have these meetings more frequently to establish a relationship and answer questions and concerns. As they become more comfortable, you can increase the time between one-on-ones. Just be sure they at least happen monthly.

> **Bonus Points:** Solicit feedback from employees too. Ask about concerns or challenges they might be experiencing. They might have suggestions on new tech, upcoming tools or updates to processes that will help the company overall. It will also ensure you retain the A Players you hired.

☐ **Schedule Frequent Team Meetings.** Team meetings should focus on projects, upcoming deadlines and anything that needs to be addressed to keep up productivity. However, these meetings can be a great opportunity to build and maintain culture, so make them as interactive as possible. Make it a video call, invite employees to share inspirational quotes, industry stats or fun facts to get the conversation going.

> **Remember:** Your team is dispersed, so be cognizant of time zones. Try to vary the meeting time slot so that no single employee or locale is consistently inconvenienced.

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