



The importance of setting expectations for your team and direct reports when working remotely

Managing a team remotely? Working from home? Both are growing trends in the workplace worldwide, but not necessarily experiences you were hugely familiar with up until a few weeks ago, when the Covid-19 pandemic shifted every business worldwide into a period of enforced change (and one that keeps on changing!). As an industry, as businesses and as managers, we've reacted quickly to shifting our operations to home, whilst continuing to service our clients and support our employees through this challenging time. To continue doing so we need a healthy, motivated and productive team. So, as we enter this new reality, we want to make sure that you have access to the practical tools and guidance for you as a manager and for your employees.

This article and set of resources aim to support people managers with;

- 1. How to set clear expectations**
- 2. How to measure productivity**
- 3. Effective Communication**
- 4. Avoiding isolation whilst in isolation**
- 5. Resources for you to share with your employees on topics such as explaining Covid-19 to your children and tips to help manage anxiety**

We've seen an increasing trend in remote working over the past few years and for good reason – studies have shown that remote workers can be more engaged and productive as they are afforded more flexibility in maintaining a better work/life balance.

Within brokerages however, remote working has been more complex to implement due to the customer-facing nature of the business and therefore there has been slower, or zero take up. However, the events of the past couple of weeks have forced this change at an unprecedented pace, leaving people managers with a greater variety of responsibilities. Facilitating teamwork, productivity and meeting an increased volume of client demands within a remote and ever-changing environment can be difficult, but below are some tips to help you manage the challenges of managing employees from home.

1. Set clear expectations

Currently employees are operating within an environment of uncertainty therefore it is important to provide clarity and structure where you can.

Under normal circumstances, your employees should know what is expected of them in their role and these expectations should still apply when working remotely. However, this can be more complicated in a remote environment. If someone wants to take a lunch break, for example, they can clearly see that half the team are away from their desks so they know to wait. Or they may know they need to re-prioritise a task based on a conversation they



overhear. An office environment lends itself to unstructured communication, but when your team are remote, you may need to adopt a more direct management style.

To avoid grey areas, clearly communicate your expectations to your team:

- what are their working hours?
- when do you expect them to be available?
- how often should they take breaks and should they let you know when they do?
- how are they expected to communicate and how often?

In an office environment it's normal for employees to pop away from their desk to make tea and coffee or have a chat with their co-workers, so the same rules should apply at home. Encourage regular breaks and social interaction but also set clear boundaries and let them know what behaviours would give you cause for concern.

It might feel like you're stating the obvious but being explicit in your expectations can help your employees feel more secure and alleviate anxiety. It also avoids the risk of anyone feeling like they need to be 'available' over and above their working hours just because they are operating in a different environment.

2. Measuring productivity

The traditional approach of employees being at their desks from 9 to 5 will be difficult to maintain across the board. Many of your team members will have caring responsibilities (either for children, elderly or 'at risk' relatives) and simply won't have the capacity to put in the same hours or may be working in an environment heavy with distractions.

One way to manage this is to switch your focus to 'output' rather than 'time spent'. Agree the tasks that need to be done for the day/week, set goals and deadlines and allow your employees to manage their own time to achieve results.

Goals should always be aligned to the company's overall mission and values, but during this time you may have a specific focus or challenge, such as an increased volume of policy cancellations or clients querying their business interruption cover. Give some consideration to the metrics you want to use when measuring employee productivity – what are the key objectives you need to achieve and how will you measure them? If you need your team to get through high-volume work quickly, then you could allocate each person a daily target, but if your focus is on excellent client service you could ask them to provide examples each week of where they've exceeded a client's expectations. It might also be more efficient for you to set team/group objectives if you are short of time.

Where possible you should give your team the flexibility to do what works for them, such as working early mornings or evenings to free up some time through the day if they need it. In these scenarios, keep an honest and open dialogue to ensure that those trying to balance multiple responsibilities are not burning themselves out through trying to do too much.



It might be the case that your clients' working hours or expectations have also changed as they too try to adapt to the current situation, so there may be scope for flexibility even with client-facing roles.

Assessing vulnerability and potential challenges

The Covid-19 situation will impact each person differently and your team's productivity will be influenced by many factors, such as health, home schooling and caring for vulnerable dependants both within and out-with the household.

By understanding each of your team member's individual circumstances, you can identify any potential pitfalls, challenges and areas in which they may need additional support. What is their home situation and what effect could it have on their health, working hours and productivity? For example, an employee who lives alone with no children may not usually have responsibilities that affect their working life, but may now be the primary carer for a typically self-sufficient individual outside of their household who is required to self-isolate.

In order to help you assess these challenges, we have included an easy template for you to complete for your team. This will allow you to understand each employee's circumstances and keep track of changing events as they unfold to ensure you remain aware of the influencing factors affecting their health, wellbeing and work performance.

Employee situation and vulnerability tracker - [Download template here](#)

3. Communicate effectively

Effective communication is arguably the most important element in managing people, however having all or some of your team members operating remotely makes this key task even more challenging.

Agreeing a schedule of communication for individual and team meetings can be helpful and where possible, try to use video or voice calls rather than emailing. The tone and content of emails or text messages can often be misconstrued, whereas face to face contact allows you to pick up on non-verbal signals such as body language and facial expressions.

Be honest about your own circumstances and the challenges you are facing as this may encourage your team members to be open with you. Ask open-ended questions to seek their input rather than waiting for them to come to you.

During this time, both you and your team may be experiencing 'comms overload'. Company wide emails, instant messages on digital communications platforms, changes to processes and procedures and news updates may be overwhelming. Take the time to discuss any email communications with your team to ensure that they have been read and understood correctly and allow them to ask questions. If there are questions that you can't answer, be as honest as you can, let them know that you'll try to find out and will get back to them. Open



communication is key to building a culture of trust, which we will discuss in more detail in subsequent articles as part of the Working Well Toolkit.

4. Avoiding isolation whilst in isolation

Employers have a duty of care to their employees and, as a line manager, you may feel under additional pressure to ensure the health and wellbeing of your team members during this difficult time.

It may be the case that employees who don't usually struggle with their mental health are experiencing some anxiety over issues such as childcare, the health of family members or the threat of financial insecurity. Try to get an understanding of the challenges that each team member is facing as a result of Covid-19 and consider where you can provide support. An example might be an employee with young children at home who can no longer attend school – you might consider re-distributing work so that they don't need to be on client calls with kids around (e.g. task them only with renewals) or allowing them to work amended or reduced hours. Touch base through regular one-to-ones and proactively seek their views.

You can also make use of digital platforms such as Skype, Teams, Slack and Zoom to ensure your employees still feel 'part of the team' when working from home. Share the load – allocate each team member an 'isolation buddy' and ask them to check in with each other regularly (if you have a large team you can rotate buddies each week). Encourage social interaction within the team – you could allocate 15-20 minutes in the day for 'catch-ups' or circulate quizzes etc. You could even do a virtual team lunch once a week, but be mindful of making any social events mandatory as some employees may not want (or be able) to give up their own time. The best way to seek buy-in for these activities is to ask your team to come up with ideas or suggestions themselves. If you're fire-fighting a heavy volume of work it might be easy to let these elements slide, however taking just a short time each day to make sure everyone feels connected will have a positive impact on overall engagement and productivity.

Additional resources:

- [HSE Stress Risk Assessment \(a tool to help you identify employees who may be suffering with Stress\)](#)
- [Mind's Wellness Action Plans are a useful tool to help you understand and support employees in managing their mental health:](#)
- [Employee situation and vulnerability tracker](#)
- [Talking to children about coronavirus](#)
- [Employee guide - Dealing with anxiety about coronavirus](#)