BEST PRACTICES WORKING AND LEADING ONLINE

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Lessons learned from an organization born digital

> n a world where online interaction and work has suddenly become the norm, leaders across industries and functions have had to change the way they manage and think about work. But what is different, now that organizations have gone online? What are the major changes, insights, and lessons learned that maintain efficiency as well as motivation?

We are a digital born organization and we have learned several lessons over the past five years—at times painful lessons. The pandemic has meant changes for all, and basic needs such as safety and motivation have come into focus again, just as in the early Industrial Revolution. It has also required the world to accelerate its adoption of many of the practices we have been using for some time, so we figure it is a good time to share what we have learned so far, so you don't have to learn these lessons the hard way!

PRACTICING WHAT WE PREACH

At the outset of our own final shift to 100% online work we had a few hypotheses about important matters to consider. Those hypotheses were based on years of experience working online and developing tools and methods for working online, but nevertheless we felt we needed to challenge those hypotheses. So, we started to collect data about the pandemic's impact on working, asking the world if there were good ideas worth spreading. It turns out there were a lot of insights and ideas out there. A big playing field for data scientists! Based on the data we collected from people all over the world, from professionals to students, we learned that we had to revise our hypotheses: a lesson we often teach our clients that we now had to face ourselves. It is rare that you know the REAL problem from the outset.

WHAT ARE THE ACTUAL PROBLEMS?

We started by posting questions linked to our hypotheses, to collect data from people who were in the actual situation of working online involuntarily. It turned out that working and leading online had three main components: managing yourself, managing your team, and using effective techniques for online interactions, particularly those with video. In all honesty, it is not that different from performing and leading work in an offline world, but there are nuances that make the whole difference. Since managing your team has been well covered elsewhere, here we will focus on managing yourself and working efficiently in your interactions.

MANAGING YOURSELF

When we dived into the data to look for patterns in the three main components, we found we wanted to learn more. And as in many other cases, the real insights are seldom derived from the experts in the industry, because then they would already be known. It is among outliers or in other fields that you often find the really interesting key findings. In the case of managing yourself when working in isolation we found deep insights from a person who really knows what it is to work remotely and alone: astronaut Scott Keeley, who spent a year alone on the international space station. His advice boils down to a few points that are general, effective, and directly applicable to professionals working and leading online.
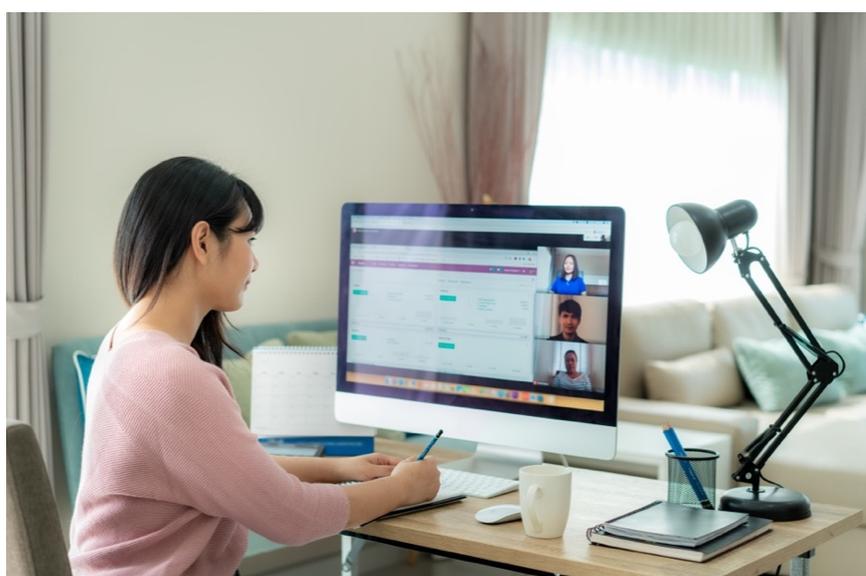
Follow a schedule

It is easy to fall off the wagon when you no longer must follow specific standards. Self-discipline becomes a lot easier when you schedule your time.

Pace yourself

When isolated, it is easy to get too engrossed in the schedule you've set yourself and burn the candle at both ends. By slowing down, you set yourself up for the marathon that is continuous online work.

Go outside

Getting a change of pace—particularly if you can go out in the fresh air—does wonders for your self-motivation. The change of pace is a good way to change your thought patterns, allowing new ideas and solutions to emerge.

Have a hobby

Work and family are not enough for a rich, fulfilling life. Especially when you no longer have a commute, dedicate some time to something you find interesting and fun.

Keep a journal

A journal gives you a long-term picture of your own state of being and helps you stay grounded.

Take time to connect to people

When working online, you spend a lot less time on the natural social interaction that takes place in an on-site workplace. Taking time to connect and socialize will improve your well-being immensely.

SOME LESSONS LEARNED IN OUR OWN TRANSITION

Meeting quality is up!

Meetings overall have become a lot better since we went 100% online. In some regions, such as the US, there was already an adamant belief in online meetings. What prevented full adoption was often a lack of comfort with technology, as well as the technology itself, which often failed to live up to expectations. Failed video calls used to be the norm. As a matter of fact, it was customary to take 10 minutes to set up the video call. Now enthusiasm and acumen for online videoconferencing has been diffused while the reliability of the technology has improved, so meetings are now far more likely to get off to a good start. We have now reached a state where online meetings have become a preferred, more productive option than the classic in-person meeting.

Mixing online and offline attendees is difficult.

Overall, we have observed a lack of understanding about the difficulty of mixing offline and online participation in meetings. This especially pertains to larger group settings. These are our experiences, from having tried to achieve a mix of offline and online participation in large group meetings.

1. Those who attend physically tend to not involve those who are participating online. In cases when they do, the dynamic suffers when the meeting instead becomes entirely focused on the online participants.

2. You need a dress code for online group settings, a requirement that is normally not necessary for face-to-face group meetings. We have seen unfortunate examples where people working from home show

up in pajamas. This can be distracting and therefore should be addressed. One good rule of thumb is to dress as you if you were going to the office.

3. The technology for both video and audio is challenging in a larger space unless you have a full-scale studio, which is typically not the case in a group work setting.

4. Physical whiteboards do not show well in Zoom or similar platforms, although digital whiteboards work very well on Zoom. Hence, unless the meeting space has full digital whiteboards that can be shared online, the online participants suffer.

5. For broadcasting, the lighting you need is different than if you were in a typical classroom or meeting venue. You want to avoid sitting with your back to a window, or a strong lamp, as your camera will continually shift in and out of focus. This is another factor that makes it hard to mix online and offline participants in meetings and workshops.

6. The frequency and cadence of breaks and pauses are different for online and offline. Online you need at least one break per hour (staying focused on a screen is highly fatiguing, so more than 60 minutes and people will zoom out). In an offline setting, for longer engagements in particular, the schedule is generally determined by coffee and lunch breaks and how long the discussions run.

7. In a case where someone is facilitating, they must focus on physical eye contact and handle physical hand raises. If you are running a meeting both in a classroom and online, the facilitator must in addition focus on chats and raised hands from the online participants while reacting to the audience in the physical room. Either way (offline or online) works, but if you were to run a mixed setting, an assistant would be needed to run the online stream to reach acceptable quality.

Good morning, Vietnam!

It's best to start online meetings and workshops with high energy. By doing this simple trick, the session starts off well and tends to run better throughout, especially in situations where the audience has a strong need for high spirits to become engaged., such as a creativity workshop. Online, there are no natural breaks before or between the meeting or workshops for social interaction, so you must compensate when working online. This is what we call the "Good Morning, Vietnam" style-opening (for reference watch the 1988 Hollywood Movie *Good Morning, Vietnam*) to energize and break traditional conventions. And be sure to allot time for socializing. Online meetings tend to run more efficiently than offline, so a recommendation is to allocate more time than what you normally would in the beginning of the call to build trust.

Timing is now crucial.

While time management is always important, it is particularly imperative once you start working primarily online. With people booked into online meetings back to back, it becomes even more important to end meetings exactly on time, or preferably a little before time. When you manage to do this, participants usually walk away feeling like the meeting was a win and they can catch their breath before joining the next one. When running workshops or larger, longer meetings and webinars, it is also important to take some breaks. People's mental energy drains much faster in an online setting. For us, 45 min (session) + 5 min (break)

is optimal, to keep the energy up over the whole segment. Tell the online audience about breaks and timing before you start. This way the audience can plan, and they can remind you that it is time for a break! Ideally you should also schedule down time between meetings. This isn't just for attendees—pace yourself!

Another aspect of time management is that interruptions in online settings are harder than in person. A useful way of working with interruptions is to use timers and put times on slides. This create natural break points. In meetings where you have longer breaks, such as lunch, make sure to specify the timing clearly. This is more important than in physical meetings, since people working from home the timing affects others in the household.

Surveillance is not the way.

Some organizations are implementing rigid surveillance and monitorization of their employees (read more at https://www.washingtonpost.com/technology/2020/04/30/work-from-home-surveillance/). This type of surveillance and monitoring did not work during the Industrial Revolution, and it will not work now. Organizations need to find other ways to ensure performance from their employees. From research we also know that the stronger the psychological contract between the employer and the employee, the less surveillance and monitoring is needed. This calls for trust and a balance between what you give and what you get as an employee and as an employer. When it comes to online work, things to consider might include remuneration for the proper set-up of people's home office, meeting areas where people can gather physically, and more effort spent on onboarding new employees, exit interviews, and preparation for internal rotations. You could say that the pandemic has accelerated what was always needed to build great companies but was not essential, since companies could work reasonably well without these matters, until now.

You need rules of engagement.

Clearly communicating expectations of how online meetings will be performed to all participants helps create a much better experience for all parties. These rules of engagement are not only for employees, but also for suppliers, partners, and customers. With clear expectations of how interactions should be conducted, you avoid outlier behaviors that can harm progress. Examples of rules of engagement can be dress code, Q&A etiquette, and a "camera on during meeting" policy. You must figure out what works for you in your situation, but for your convenience we have compiled a broad list as inspiration.

AN INSPIRATIONAL CHECKLIST FOR WORKING ONLINE

- For aesthetic reasons: arrange your computer/camera so it is higher than it is normally when you are typing. This will display your face at a nicer angle and people won't have to look up your nostrils. You will also look better with light from the side and in front of your face.

- Microphone: cordless microphones usually have much worse sound quality and lag. Use a corded or true microphone.

- Don't sit with your camera facing a window, as your image will go dark to bright to dark. Light should be steady.

- Dress code: dress as if you were in the office.

- Mute yourself if you are not speaking.

- Give yourself permission to take the breaks: it is not a waste of time!

- Take notes on paper rather than using a keyboard (which usually means you lose sight of the meeting and creates annoying sounds). You can, of course, take electronic notes with a pen as well.

- For workshops:
  - Provide clear instructions for what is recommended, e.g., a glass of water, make sure that everyone feels safe when speaking, raise your hand when you want to comment or ask a question.
  - Run a five-minute ice breaker at the start (can be silly, like two truths and a lie, or tell me your superhero) will make everyone feel more personally connected and get creativity going. For us, this has increased engagement and increased trust, especially in situations geared toward creativity for the remainder of the workshop. It helps to abolish the devil's advocate, as well.
  - Make sure to follow the rules yourself, e.g., "this is a 'yes and' space."

- If you are in an office setting and many people are participating in different webinars, plan for them to be able to do this without disturbing each other. Under these circumstances, privacy becomes a hot commodity.

- Use chats and hand raising if you are in a larger setting, especially if there's someone who tends to hijack the conversation. If not, let people break in, especially in a smaller setting.

- If you have 7 or fewer participants, do not use chat and Q&A. You can use hand raising for things like vote counting, however.

- For larger webinars, designate an assistant to keep track of questions, hand raises and the chat.

- When you lead workshops or meetings you need to understand the participants' circumstances, including where they are sitting or their work or home situation. Then bring an empathic perspective to what you learn.

- Camera: People NEED to be on camera. Some organizations have forbidden it, but if you are permitted to, generally it should be on. This creates a much stronger atmosphere of trust and connection.

- At the end of every session, reserve a few minutes to take time to say goodbye.

- Assign prework that does not consist of reading: instead, give the participants a task. Have them think, create a document, or perform some other action to prepare. Here online collaborative tools fill a very important role. Consider engagements as "before," "during," and "after." The "before" should not consist of reading a McKinsey report or other typical nice-to-read handout. It should entail some form of creation on the part of the participant.

- If you are a presenter or facilitator, preparation is more important online. It is harder to "wing it," and you don't have the same tricks available as offline.

- Remind people a week before, a day before, and an hour before you have a major online event such as a webinar. People forget. Use automatic tools to help you with this.

- Voting is a good way to involve people and is easy to implement online. This works well in the tool Zoom, for instance.

- Explain to participants that they shouldn't feel bad about their situation. If they have spouses, children, pets, etc. who may disturb the online interaction, it's OK! We're all in the same boat!

- Ideally, meetings should be ALL ONLINE or ALL OFFLINE.

A note about equipment.

When it comes to equipment, it doesn't always have to be expensive. Often, you already have what's needed. For instance, you might use your old digital camera as a web camera just by connecting it with a USB. Or just use your old HiFi headphones to for audio. Or if you have access to a green screen, you could use a photo from your office as a background, making it real, trustworthy and relevant.

CONCLUSION

Working and meeting online is here to stay. By adapting some of the insights we have shown you here, you have a better chance of succeeding with your goals when working online—as well as offline! Now is the time to embrace this accelerated technology revolution and use it to create a better work experience, with more collaboration, motivation, and innovation, and more space for thinking, privacy, and work-life balance.

ABOUT THE INNOVATION 360 GROUP

The Innovation 360 Group helps organizations establish an adaptable innovation process and foster a culture of innovation. Its data-driven action plans are based on analytics from thousands of innovative projects over many years. In today's intricately connected global marketplace, characterized by extreme competition and the daily appearance of new competitors, disruption is the status quo. Data trends indicate that around 40 percent of the companies thriving today will be gone within the next 10 years. In this new world, innovation is a basic survival skill. Innovation 360 is recognized as a leading international innovation management firm, with a growing presence in 30 countries and operations in nearly all major language groups. From its executive offices in New York and Stockholm, it oversees worldwide initiatives through a network of accredited practitioners trained in Innovation 360's methodology. It has aggregated the world's largest database of concepts in practical innovation and developed Sherlock, the first AI program devoted to deep mind pattern recognition within innovation data. The Innovation 360 methodology includes research in innovation, evidence-based analysis, and recommendations for concrete execution plans to increase innovation capability, profit, and growth. An overview of this proprietary process is published in the Service Provider's five-volume series *The Complete Guide to Business Innovation*. On a global scale, Innovation 360's innovation consultants are currently addressing the world's toughest challenges, including the equitable distribution of food, energy, water, security, global health, education, environmental sustainability, and access to space. Its consultants have been tasked with formulating the upcoming ISO Standardization for Innovation Management. It helps organizations align their operations with these emerging international standards. Innovation 360 specializes in leading enterprises and governmental bodies on original approaches to ideation, codification of creativity, and market strategies linked to developments along three horizons of breakthrough technology. Leaders can learn how to recognize advances in productivity and profitability from the intelligent management of innovation portfolios. The Service Provider can facilitate the design and execution of interactive training workshops (innovation circles) or help transform an organization through proven change management action plans.