



**Pacific Southwest**  
Minority Supplier  
Development Council

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## **VIRTUAL WORK ENVIRONMENT BEST PRACTICES CHECKLIST/GUIDELINES**

Below is a check list of questions to ask yourself and to discuss with your team so you and your team are appropriately prepared for the new arrangement.

### **1. The Basics - Getting Ready**

- Do you have the necessary IT hardware?
- Do you have somewhere suitable to work?
- Do you have sufficient internet bandwidth?
- Do you have the appropriate software for working remotely?
- Do you require access to test devices?
- Do you need VPN access?
- Do you need any training or guidance on software for effective remote communications?

### **2. Communications Plan – Planned communications**

- Do you have a plan for Stand-ups?
- Do you have a plan for scheduled meetings?
- Do you have a plan for retrospectives?
- Does your team have the means of communicating with you and vice versa?



### **3. Communications Plan – Unplanned communications**

- Do you have a plan for pairing?
- Do you have a plan for turnarounds?
- Do you have a plan for questions and discussions?

### **4. Risk Management**

- Do you have a plan for Webex/Slack/etc downtime?
- How long is this arrangement for?
- How will you know if this isn't working?
- What will you do if this isn't working?
- What if something goes wrong with hardware or software?
- Do you have a plan to check in regularly with your performance manager?

### **Meetings**

Productive meetings are built on trust, and trust is built on effective communication. Which is why we often say that face to face is the best way to interact, but the reality is that it is not always possible or practical to be face to face, and so remote meetings are becoming more and more a part of our day to day lives. But how do we make them *effective and provide a quality experience for everyone?*

### **The Basics**

- **Be Audio Aware** – A microphone often picks up more than you realize. That private conversation you are having with the person next to you when leaning over a microphone is not private. Your chewing may not be private either. Please don't eat or drink while unmuted. Lastly, speaking from the opposite end of the room without a microphone can be disruptive as it excludes remote participants from hearing your thoughts.
- **Use Video, When Possible** - Video can be used to your advantage when collaborating. Please make sure others can clearly see your face and you're usually speaking towards the camera.
- **Mute Appropriately** - If you're not speaking, leaving your audio on only invites unneeded background noise.
- **Do use a "hardline"** internet connection, whenever possible to ensure best connection quality.
- **Use 'Brady Bunch' (Grid) view**, on a Webex unit this is 888 on the dial pad to change the display.
- **"Can you hear me now?"** - Recalibrate & check on your remote set-up frequently! Having a good headset and/or microphone will save you and those meeting with you, a lot of pain.

## Etiquette & Inclusivity

We want everyone to feel heard and appreciated during remote meetings. Some of the etiquette outlined below will assist with remote participant inclusivity.

- Make Introductions at the Start - Matching faces with names is something all larger organizations struggle with. When remote it can be even harder to identify who is talking.
- Intentionally Pause to Combat Connection Lag – Sometimes, there are seconds of audio lag. Intentionally pausing or specifically ask others for input at the end of your thought assists with meeting flow.
- Indicate a Desire to Speak Next - This can be done with your hands, using written chat functionality within the remote tool of your choice, or by using non-verbal 'cue cards' or Post it! Notes.
- In larger meetings, consider only turning on your video & audio when you are speaking.
- Remote Facilitation - Remote meetings generally should have a facilitator and/or a designated person leading the meeting, this helps with flow and they can watch for indications of who wants to talk.
- Say 'No' to Side Conversations - Typically, having three different conversations occurring at once only confuses everyone involved.
- Intentionally Encourage Remote Participants to Engage - At times, several people will want to respond. When you are done speaking, encourage others to share their thoughts before moving to the next topic.

### Taking Remote Meetings to the Next Level

1. Consider mandating remote-only participation, regardless of location, as an experiment. Ask typically remote participants to discuss what they liked and disliked about the experience.
2. Consider using non-verbal 'cue cards' to indicate agreement without distracting, let people know you need to step out without interrupting the conversation, or quickly poll all remote participants.
3. Ask remote participants about where they are geographically as an icebreaker. This is very powerful because location is very evocative and emotionally bound so helps build bonds. E.g. "I always wanted to visit there", or "I used to live near there".

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