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Expert Q&A: How to set up a remote work process

- **Jessica Patterson** 🐦 @jesspatterson | 17th Mar 2020 | Features

Over the past couple of weeks, magazine media offices and newsrooms around the world have followed public health guidelines and sent their staff home to work online because of the global coronavirus pandemic. But, what does remote work mean for magazine media companies, and how can we address the challenges?

Working remotely comes with its own benefits and challenges. It can affect morale and spontaneity, as bouncing an idea off a co-worker or brainstorming isn't as easy when there's no one to bounce it off of. It requires a different set of abilities and skills, like time management and communication. "It also requires

proactive communication and an almost hyperfocus on what's happening with team members since you don't have the regular face time with them," wrote Jason Aten, tech columnist at Inc. last year.

We asked Kilian Schalk, founder of PurpleGray Consulting, who has helped magazines work remotely for the past 15 years, a number of questions about best practices.

Kilian Schalk

How do you build a remote workflow?

Think of people first, then the process. Individual tech skills are paramount. Everyone on the team needs to be using (and able to use) the same tools. For example, email is useful for communicating with the outside world; Slack, Google Docs, and Trello-like tools are good for internal correspondence. Make sure that everyone has everyone else's contact information in a shared document.

Everyone on the team needs to have the basics, which for me are Google Docs for editing, Trello for organising, and Slack for communicating. It's important to build a shared work community (water cooler included). Use Zoom for video calls if you don't have the paid version of Slack. Google Docs are a team editing tool and a great place to get everyone facing in the same direction. Once everyone can access Google Docs they can create new shared documents, they will be working in the same space, and they can comment, tag, and share work collaboratively.

That said, there can be an initial learning curve with collaborative work on Google Doc if team members haven't used it before. Individuals may try to hide that they don't know how to do something. That may have been fine at the office, where discreet help is available; in a remote situation it is critical not to hide. You can't fix a problem if you can't see it. Make sure people understand that there is no shame in learning something new.

One way to tackle this head-on is to have two of your least tech-savvy people create a document, then share and co-edit it with everyone commenting at the same time. It's OK if it gets ridiculous – when people can laugh together it becomes easier to ask questions. Also, it can be pretty amazing to see what happens when five to ten people edit the same document in real time.

Once everyone has experimented with group editing in Google Docs, make sure they are all aware of the difference between the Editing and Suggesting modes.

Then repeat the process with Trello. Have everyone build a new Trello board and share it with everyone else.

Then set up a Slack channel that includes everyone. Stick with one channel at first and require everyone to contribute to the conversation. This can be a little like what happens at the beginning of a conference call, where you go around the room and ask everyone to say something.

Run a similar experiment with a Zoom call – have everyone watch how it works and make suggestions. Don't skip this step – it's important that people be able to turn on the video function and see each other.

These exercises will give your team the tools they need and let them see how everything works together.

Once everyone has some experience of using Google, Trello and Slack, move your focus to workflow. Recreate one small, simple production process (for example a blog post or very short article) that happens quickly using the new tools. Ideally, the people who performed these functions at the office will build the new workflow (you may need to have a Slack/Zoom call to coordinate), and ideally it will involve as many (relevant) people as possible… with everyone else observing from the sidelines. Repeat the process with a second team leading the charge. Then review with everyone giving their suggestions. It may get messy, but the buy-in is important because...

Once the team has built a new workflow and learned how to support each other in doing so, they can move forward to build other workflows as well.

The eventual goal is to get everyone participating in creating a remote process, managing a remote process, and using a remote process. It will work best if it comes from the team.

What are some simple solutions that can be put in place that allow employees to transition to remote work?

When everyone is remote, staffers who are not technically savvy may become isolated and they may not know what to do. You'll be able to tell because they will 'go dark'.

Have a meeting up front when you begin working remotely to confirm what kinds of hardware everyone will be using and assess individual comfort levels. (Keep a phone number handy for every member of your team – you never know when wifi will go out or some other local technical disaster could prevent people from contributing.)

Make a skills chart to help you limit time spent on tech support and training. Record the skills each person will need for each tool you're going to use as well as the skill level each person thinks they have. Ask questions such as: 'What is ___?' and 'Do you know how to___?' Expect answers like: 'Well, I can open and modify Google Doc files' or 'I'm comfortable helping someone else get set up' or 'I can build a system'.

Once you have a complete view of the skills situation, enlist the help of those who have more skills to get others up to speed. This is a great example of how a rising tide lifts all boats. Repeat your chart interview process once a day to monitor the inter-team training process until everyone has all of the skills they will need to contribute effectively. Also, celebrate success! It can be a very big deal for someone who's skill level has lagged behind the rest of the team but was afraid to mention it to regain full functionality and an equal ability to contribute.

How do you manage as an individual working remotely? As a manager, how do you manage a team working remotely?

Set up a daily call (10 minutes max) in which everyone shares what they are doing that day. Think of it as a hybrid between a staff meeting and a group training session. It's important for everyone to hear everyone else's voice every day so they feel comfortable calling on each other when they run into difficulty, have questions, or need help. These connections are very valuable.

Have people from different departments lead the daily meeting so the rotating tone reflects the participants.

Critical feedback will be harder to give (and take) in a remote environment. Especially at first, until everyone gets used to the new normal. Stay the course, and be patient – everyone will make mistakes (and everyone will likely have a moment or two at some point) but it will also be almost impossible not to learn from them. Mistakes in a remote setting are a feature, not a bug. Remember that you are managing people. Those people are managing your process. Let them figure out how to do it. Check in with everyone individually at least once a week, and LISTEN. Do whatever it takes to resist the urge to micromanage!

Are there challenges that magazine media might encounter? How do you deal with problems?

An office-based workflow will start to fall apart as soon as it moves to a remote setting. Immediately – on the first day out. It's likely no one will notice, however, because the entire team will be too busy catching up and adjusting. You will start to see actual workflow challenges swing into focus about two-three days after the process goes remote, when the absence of office meetings and face-to-face connections that kept everyone on track under normal circumstances begins to cause strain.

The phrase 'I'll email you the file' is a big red flag. Some people will inevitably prefer the tools they are familiar with (Word comes to mind) and resist using the new remote tools. This is fair, but it hurts the rest of the team. 'Can you put this into __ for me?' is another one to look out for. The Golden Rule of remote work is that everyone must not only use the same tools, they must be responsible for their own input. No passing the buck to more tech-savvy colleagues (this is often code for more junior or younger). Even, and especially, on the sly.

When these kinds of things start to happen, schedule ten minutes on Zoom to review the current process as a team. Make sure everyone understands it the same way. Pick someone at random to talk through the process and explain it to everyone else. They won't be able to. Help them through it, then pick someone else. Don't give up until everyone has explained at least part of the process to everyone else. The goal is a shared understanding.

Do you have tips on software to use to keep in touch?

Make sure you have something that will help you organise and share documents with multiple people, something that will organise and visualise what those people are doing, and something that allows those people to communicate. Those are the three pillars of remote work.

My go-tos are Google Docs, Trello, and Slack. They are all available for free, they are all simple to use, and they can get a team up and running quickly. Zoom helps with communication.

There are, of course, other options. And you may switch to different tools mid-stream if that meets your needs. But whatever you choose, the key criteria should be: cloud-based, simple, and accessible by browser and/or a phone. When this is all over and you no longer have to work remotely, you will probably find your team has grown rather accustomed to editing (in particular) on their phones.

How do you work remotely for team meetings, training or working with clients?

Structure the day. Everyone will need time to work on their own and time to work together. Establish time slots for these very different activities during the day – for example, 9-11:30AM and 2:30-4:30PM are heads-down don't-disturb-me time, and 11:30AM- 2:30PM is when you schedule meetings and encourage people to interact. There may be a team meeting first thing in the morning, and/or maybe you wrap up with a check-in. Experiment with different rhythms (and solicit group feedback) – whatever works for you collectively is fine. The key thing is that everyone is able to work in sync with each other and everyone has been part of the decision-making process. Pick a time (together) when people are available to interact. And pick a time when everyone is heads-down.

It's very similar with regard to working with clients or running a remote training session. Working with clients and remote training (public-facing activities) are heads-down work. Make sure people have the space and support they need to keep your public face looking good.

Remote work basics:

1. Laptop with camera

2. Earphones

3. Wifi

4. Access to a techie (of any age)

5. Boundaries with anyone who shares your living space

Is it possible to over-communicate when you're working from home?

Oh yes! Very much so. It's a balance. You want to share, but you don't want to over-share. It's important not to burden people with disorganised demands, encourage time-sucks, or create confusion. Well-organised communication is key. Spouting off, spewing anxiety, and dumping unexpected work on others is not helpful. Neither is secretive… anything. A good rule of thumb for appropriate remote communication is if it wouldn't fly in an office, it definitely won't fly at a distance. As with emergency exits, keep communication channels free of clutter.

People rely on magazines and news media to stay informed during a crisis. Journalists and reporters and photographers and videographers will be working flat out for the near future. How do you protect against burnout?

Pace yourself. Don't try to do everything at once. Get very, very clear about how you prioritise – not everything labeled 'urgent' actually is – and put boundaries in place with managers and clients; make sure you respect them too. Take regular breaks to let your brain have down-time – focus is a precious commodity – and remember you are a human being who has limits. Respect those limits.

Don't forget to eat and drink. Bathe. Do laundry. This is a marathon. Clean a little bit of your living space every day – the hour you spend engaging with your physical surroundings will balance all the screen time and contribute to your mental health. It might also give your mind space to ruminate in the background about that paragraph you are stuck on or the design element giving you trouble.

Remember your purpose. Remember why you are doing what you are doing. The higher-quality time you spend on what and how you communicate will make a big difference. Speed isn't (always) everything. Doing a good job in these circumstances is bringing your community of readers together and building trust. Stay healthy for them.

How can employees manage their mental health while in isolation?

Once again, balance. Put down the keyboard, leave your phone at home, and go for a walk (away from other people) when you feel stressed. Find a park and check out the crocus. Sit on a bench and watch the clouds go by for a few minutes. If you can't do that, go into a different room and stare out a window. Open it. Find a way to get fresh air. Remind yourself that this too shall pass and the world is still out there.

And then come back inside and call (don't text) a friend. Chances are they could use a friendly voice, too. Ask your friends to read your content and engage with the subject matter (not the form). Talk about something else entirely. Get creative and find human ways to connect with real things. Step away from technology for a few minutes.

Most of all, remember you are not alone. Ask for support if you need it. There are lots of people who can't do their usual work from home and will be looking for a way to support what you're trying to do. Recruit them to make lists and keep them updated for you. Ask if they'll cook dinner. Build a community that meets on Zoom or Slack in the evening to talk about your day. Try to create as much normalcy as you can.

Do you have any final tips for magazine media teams working remotely?

Yes. If you are a boss:

No one on your staff will tell you that using email to send documents, not having an open calendar, or being late to calls is a problem. **But it is.**

Like anyone else on your team, if you don't know how to use any part of the new remote process or you don't understand something, you need to learn quickly, pull your own weight, and be willing to take direction and (appropriate) feedback. This is a time to be humble. You don't want to be the invisible anchor weighing everyone down.

That said, your leadership in these moments will make a huge difference. Trust your team, ask them what they need, and give it to them. Remote leadership can be a challenge, but it can also create huge opportunities for growth. Yours, that of your team, and that of your business.

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