

Sargent Solutions Inc.

Managing a Virtual Team



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Land Acknowledgement

“I acknowledge that the geographic area I work in is located on the traditional lands of the Ojibwa Chippewa of the Anishnaabe group of Indigenous peoples. As a community, we have the responsibility for the stewardship of the land on which we live and work. We recognize and deeply appreciate the Indigenous historic connection to this place and the agreement with the Crown of Canada to peaceably share and care for the resources around the Great Lakes.”

Agenda

- Introduction
- Keeping the team motivated
- Managing the tasks and workload
- Virtual Interactions with donors/clients and team members
- Question Period

Wendy Smith

Founder & CEO

- Using Blackbaud: 20+ Years
- Founded Sargent Solutions in 2006, working virtually since 2016
- Believe anyone can change the world



Sargent Solutions

- We fill the gaps in the non-profit space by fundraising, finance, and database management in a way that solves problems.
- Work with clients in all Canadian Provinces.
 - Currently in 26 of the 50 United States.
- Recipient of the 2018 Blackbaud Partner of the Year Award and We Give Back Award.



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POLL:

What are your organizations
biggest struggles?



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Managing a Virtual Team

“Leadership should align everyone in the organization with a clear and compelling vision... in the office *and* when working remotely.”



The Challenge

This is an adjustment for your team

- Your team is juggling added responsibilities when working from home... teachers, parents, team members, and more

Government: Work from home
Zookeepers:



The Challenge

**There must be a focus on goals,
not on time spent**



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Keeping the Team Motivated

Set Your Team Up for Success

- Set clear and attainable goals... and get your team's feedback!
 - Goals for the overall organization
 - Goals for specific departments
 - Goals for the individual

KPI's Set Your Team Up For Success

- Are projects completed on-time and on budget?
- Are they utilizing all the tools and resources you have available?
- Is communication clear, friendly and timely?
- Are they working with the donor in mind?

Provide Tools Needed for Success

- Training
- Autonomy
- Budget

Training

- Proper training will make team members feel more confident in their work
- Knowing how to do the tasks will allow them to work more efficiently
- Provide a training timeline for new employees

Autonomy

- Give your team space to achieve goals
- Team members will work better when they don't feel micro-managed
- Do they know what success looks like?

Budget

- Give departments a realistic budget
- Implement budget tracking programs
- If they are part of the creation of the budget they will have more buy-in to achieving it



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POLL:

As offices start to open again,
where would you prefer to work?



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Managing Tasks & Workload

Discuss Expectations

How to handle “from-home” situations

Ex. Their child pops into the zoom meeting

- If they're in a call with a client
- If they're on an internal call
- Go over ways to avoid this situation and/or what to do when it can't be avoided

Discuss Expectations

How to manage added elements in daily work life Ex. Flexible time

- Working from home can bring up distractions –
 - How can your team adjust their time management?
 - Are you still expecting 9 to 5 or are you allowing them to manage their time based on their personal situation and environment

Project Tracking

- Implement a project management tool to keep track of projects and tasks as they progress
- Set clear expectations and deadlines to ensure projects keep moving along

Does It Still Apply Virtually?

- Just because it worked in the office doesn't mean it will work virtually.
 - Is your team running in circles trying to do things the same way even though there are now five more steps involved?
 - Take time to review the processes and ask your staff what is working and what isn't.

Does It Still Apply Virtually?

- Consistency is key
 - Create a consistent strategy for files and folders
 - Get team member feedback on strategy
 - Implement, share, explain
 - Keep checking in

Does It Still Apply Virtually?

- Use Collaboration documents
 - Keep folders in a drive that can be shared across the team when needed
 - Highlight edits, changes, etc. Take revision notes within documents

Having the Right Tools

- Invest in the proper project management software
- Brainstorm ways to keep everyone connected and on top of their work – inspire your team
- What we use (Teamwork)

Work/Life Balance

- Remind your team when to *not* work
 - Encourage to take lunch breaks
 - Allow for vacation time
 - Remind them to have a little fun

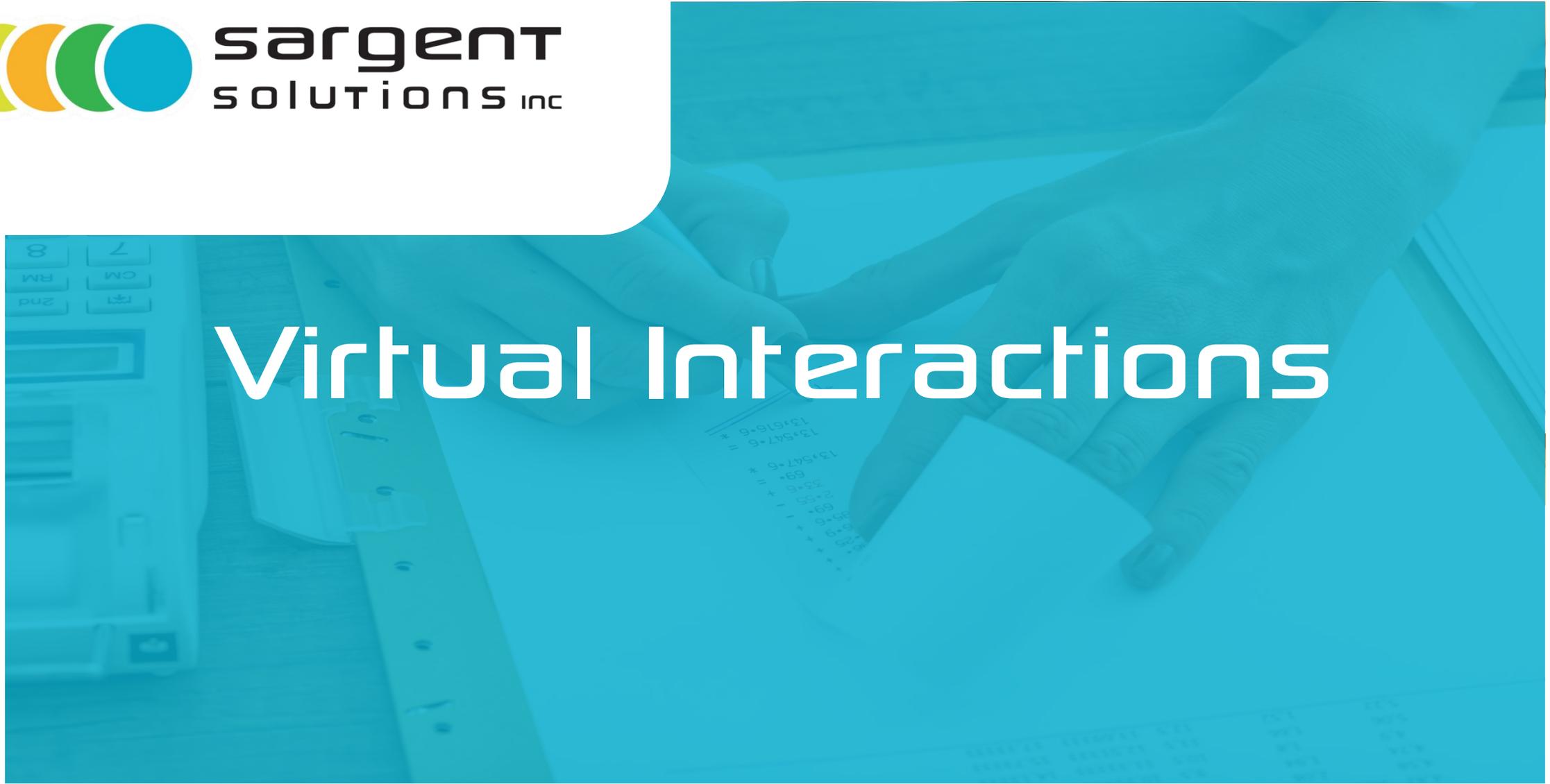
Ask Your Team

- Count on the team to create a system that will work for everyone
- Ask for employee feedback
- Show your appreciation!



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Virtual Interactions



Use the Phone!

- Phone calls allow for conveying more genuine tone
- Turn on video when possible to give the in-person feel

Daily Check Ins

- Touch base with all employees at least once throughout the week
- Don't only focus on work.
- Ask how they are managing and what they need for success

Team Meetings

- Start internal meetings with a joke to maintain positivity and lift morale
- Meet with the team regularly to keep everyone informed

Time Zone Differences

- Virtual work allows for doing business with donors/clients across different time zones!
- Be flexible about this with the team
- Be aware and courteous of all time zones when booking meetings

Maintaining “Office” Culture

- Try to host in-person get-togethers when possible
- Encourage social hours – get everyone together for some virtual fun!
 - Questions
 - Games
 - Breakout rooms



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Questions?





Find out your Leadership Style Today!

LEADERSHIP QUIZ

Find out if Sargent is the right Partner for you!

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CONSULTATION**



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