LEAD ANYONE FROM ANYWHERE

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DISRUPTING THE STATUS QUO:

BE WILLING TO LEAD A HYBRID WORKFORCE – OR GET OUT OF THE WAY

In 2012, Marissa Mayer left Google to become the CEO of Yahoo.

She was brought in as the turnaround guru for the struggling tech giant, and she planned to take the playbook that she had used at Google and simply apply it to Yahoo. This game plan included a move to keep her employees in the office for longer periods.

For employees in the tech world, hybrid workplaces aren't uncommon, but Mayer felt that their physical absence from the office was part of the reason why Yahoo was struggling. She wanted to change that by transforming the Yahoo offices into a place where the employees would want to spend all of their time. Her theory was that if employees wanted to be at work, then their productivity would increase, which would positively affect the bottom line. In part, she was trying to shift the company culture.

It didn't work.

The corn hole and beer fridges weren't appealing enough to keep her employees away from their work, family, and lives that all took place outside of the office. When she realized that her big plan wasn't delivering the results she hoped for, Mayer banned her employees from working from home.

Her decision was shocking.

Mayer's act went against an existing culture of agility and innovation. By forcing everyone to come back to the office, her employees were unhappier and less productive.

In telling her employees they had to be in the office, Mayer and her leadership team were inherently saying that they didn't trust their employees to get work done without being supervised.

So, fully grown adults who were very smart and very capable left Yahoo.

And that shocked *no one.*

Still, many companies hold to the idea that business can only be conducted in an actual brick-and-mortar office.

But at BELAY, we know better.

So if you've ever wondered what it would take to elevate your hybrid leadership, know that we've done this for years – winning countless awards for it, too – and will share what has worked for us — and can work for your organization, too.

Here, we'll share everything you need to know to successfully do the same.

DOING MORE WITH LESS:

THE BENEFITS OF FRACTIONAL HYBRID WORKFORCES

It was estimated that by this year (2022,) **53%** of the U.S. workforce would be remote.

For comparison and perspective, just five years ago in 2017, roughly **5.2%** of the workforce was remote.

We moved an entire decimal place in just five years.

But before the naysayers and in-office fans balk, let us be very clear about our position: Hybrid staffing isn't a *loss* of what we're used to; it's a gain of something new.

There's a positive side to it, and *BONUS:* You can leverage everything you learned in 2020 and beyond.

But first, let's start with what, exactly, a **hybrid workforce** is.

Because maybe you've heard about *'remote workforces.'* And *'virtual workforces.'* Maybe you've even heard of *'distributed workforces.'*

All hybrid workforces are remote and virtual – at least part of the time – and sometimes, they can also be distributed. Clear as mud, right?

Put simply, a hybrid workforce is a flexible working model where employees work partly in the physical workplace, and partly remotely – at home or from another workspace.

It's a little from column A and column B.

To make sense of this burgeoning workforce, AT&T conducted a new **future-of-work study** which included 303 United States-based respondents, 87% above-director level, across five key industries, with more than one-million employees represented and 34% with companies over $1 billion in revenue.

The results revealed that while hybrid is the preferred choice of many businesses, 72% of businesses lack a clear hybrid-work strategy. *(More on that in a minute …)*

HIGHLIGHTS OF THE AT&T STUDY

Hybrid work will be the default by 2024: Half of work will be performed offsite: 81% believe hybrid work will be the foremost working model by 2024, with 56% of work done off site

Vast majority of businesses lack a detailed hybrid work strategy: 72% lack a detailed strategy and 76% don't have the right key performance indicators (KPIs) to support hybrid working models *(Again, More on that in a minute ...)*

100% of respondents believe a hybrid work model will help attract young talent

So most employees and future employees want it, and leaders unanimously agree it's the right move to attract talent, but the majority of organizations don't know how, exactly, to make it happen. *(Talk about reading the right book at the right time.)*
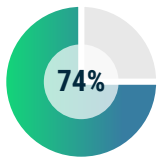
But maybe after all this, you're still skeptical. Maybe this is all too subjective. Too nebulous.

Say no more. Because we've got the data to back it all up.

HYBRID WORKFORCE BY-THE-NUMBERS

Let us consider these statistics as we make our case for the benefits of a hybrid workforce:

NORMS AND EXPECTATIONS ARE SHIFTING

74% 74 percent of respondents said that **flexible working is the new normal** – and not just a desirable perk.

HYBRID WORK IS ATTRACTING AND RETAINING TALENT
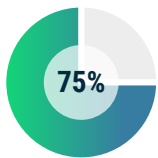
75% More than 75 percent of respondents cited flexible schedules and remote work as the most effective **non-monetary ways to retain employees.**
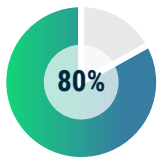
80% Additionally, 80 percent of U.S. workers said they would **turn down a job that didn't offer flexible working.**
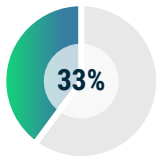
33% More than **33 percent** said they would prioritize work-from-home arrangements over having a more prestigious role.

HYBRID WORKERS ARE BEING MORE PRODUCTIVE
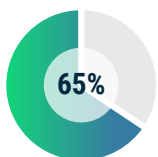
65% 65 percent of respondents are **more productive in their home office** than at a traditional workplace boasting fewer distractions and interruptions, less stress from no commute, minimal office politics, and a personalized, quiet environment.

HYBRID WORK IS GOOD FOR BUSINESS
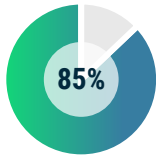
85%
85 percent of businesses confirm that **productivity has increased** in their company because of greater flexibility.
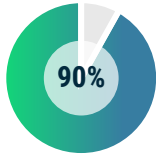
90%
90 percent of employees said allowing for more flexible work arrangements and schedules would **increase employee morale.**
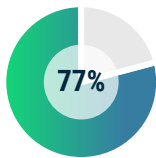
77%
77 percent said allowing employees to work remotely could lead to lower operating costs.

HYBRID WORK IS INCREASING JOB SATISFACTION
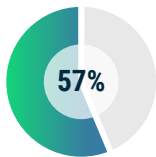
57%
57 percent were found to be more likely than the average American to be **satisfied with their job.**
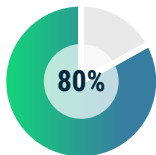
80%
Nearly 80 percent described their typical stress level during the workweek as either "not stressed" or only "moderately stressed."

THE NEW PARADIGM

This then begs the question: How do these statistics inform the new workforce paradigm?

ORGANIZATIONS ARE CHANGING

As we discussed before, organization models were designed to control the worker. Marissa Mayer required her employees to be present because she didn't trust her employees to get their work done.

Now, however, productivity doesn't mean that you have to sit in your seat. Using a computer and phone, employees can be productive from *anywhere.*

ARCHITECTURE IS BEING REIMAGINED

Rows of cubicles and corner offices aren't necessary; in fact, many are already gone.

Many people are free to work from wherever they please because their jobs don't have to be done onsite. The real estate needs of corporations have changed to create a more agile, flexible, and fluid work environment.

LEADERSHIP ROLES ARE EVOLVING

Leaders are no longer tasked with supervising work because they believe it won't get done without their observation.

Visibility – the mindset that *'I can't see you; I can't control you'* – is a depreciating currency.

Now, instead of seeing results from face-to-face interaction, hybrid leaders reap the windfall of benefits from treating people like adults. Coworkers move to more trusting relationships. Often, employee satisfaction is low because they don't feel trusted. But when trusted, employees feel more connected to the mission and the organization.

When employees care, they want to work harder for their leader.

RULES OF ENGAGEMENT ARE CHANGING

How we treat our employees and how our employees treat each other is evolving.

At BELAY, we explicitly tell our employees that when something goes wrong – as it inevitably will – our default is to trust.

We want our employees to address the issue and say, *"Listen, we have a gap. You said X, and you didn't do it."* And they must do so while actively choosing to fill the offending gap with trust.

(More on that to come.)

They must assume that the person who screwed up didn't do so purposefully. Because when there is trust, there is a healthier bottom line, healthier employees, and a healthier culture.

We see how happy our employees are to work at BELAY, and we see how it translates directly to our success, both financially and interpersonally.

VIVA LA (HYBRID) REVOLUCIÓN

Our prediction: In twenty years, almost all employees will be contractors, with most of them working in a hybrid capacity.

Cubicles will be a relic of times past.

Successful employment will no longer be measured by the hours you work, but rather by the results you produce.

A few years ago, Accenture predicted that by 2020, **43 percent** of the workforce would be freelance, and labeled this group 'the liquid workforce.'

Well, the 'future' – 2020, that is – has come and gone.

And if that – and everything that 2020 has dropped at our feet – doesn't sound an alarm in your head, then nothing will.

Why?

Because people of all ages in the workforce see that this type of world is out there. They see a future where they can conduct a meeting from their back deck or meet with a client while sitting on their couch. A world where they can contribute, execute, and have flexibility and autonomy all at the same time.

People on all levels of the organizational chart want to live in this hybrid workplace reality. Front-of-the-line employees want it. Contractors want it. Management wants it. Executives want it. Owners want it.

So in this book, we're not only hoping to encourage you to give them what they want, but we're also equipping you with the four critical skills necessary to execute it successfully.

And trust us when we say: Your culture, your people, and your bottom line will thank you.

THE GROUNDWORK:

BUILDING A HIGH-PERFORMING HYBRID TEAM

As more organizations move toward hybrid workforces, leaders must be adept at modifying the way they lead and delegate to their teams. Creating hybrid teamwork that is successful and extraordinary is possible.

But all too often, leaders can develop a hero complex, thinking they have to solve every problem and be involved in everything that's happening in the workplace. But doing that for too long can cause burnout – and quickly.

Instead, leaders should adopt a mindset of encouraging their team to not come to them with problems but rather solutions to talk through together, empowering staff to solve problems on their own so they can be the hero.

So maybe you're considering taking your team hybrid, whether it's introducing a flex day, moving to two days from a home office, or jumping in with both feet and going 100-percent remote.

"

[Your team] wants to know that the organization that they work for has a bigger purpose. They want opportunities to grow – and they want you to help them do that. They're looking for a remarkable culture.

So if you want to attract great talent, those are the things you're going to talk about and focus on; those are three of the most important things to focus on right now.

Chick-fil-A's purpose is to glorify God by being a faithful steward of all that's entrusted to us, to be a positive influence on all who come in contact with Chick-fil-A.

So everyone who comes through those doors – whether they are a Chick-fil-A staff member, a franchisee, customer, vendor, guest, whoever they are – they know exactly why [Chick-fil-A] exists.

DEE ANN TURNER
FORMER VICE PRESIDENT OF TALENT AT CHICK-FIL-A

But maybe you're not sure how to start laying the groundwork.

Lucky for you, we can help.

Since our inception, we've been 100-percent remote – and our team is 100-percent productive. We believe that's because we set the following relatively simple guardrails – establish, explain and execute – for building a high-performing hybrid team as our standard for how we do business.

ESTABLISH | In this first phase of building a high-performing hybrid team, you lay the groundwork – primarily for yourself as a leader – before the first hybrid employee is onboarded. That way, you know what you'll be handing over and how you'll stay connected, both through communication and culture.

EXPLAIN | In this second phase, you've now onboarded a hybrid employee and must clearly share your expectations, availability, and scheduling.

Admittedly, this phase should really be the 'Communicate, Communicate, And Then Communicate Even More' phase.

EXECUTE | This third and final phase comes full circle and passes the baton back to you, the leader, as you now actively lead your hybrid team.

From this point on, it's imperative to have faith in your leadership, delegation process and people. And while it may be hard to let someone else take the reins, you're primed to lead and delegate effectively and successfully.

> A lot of us are used to being the go-to person. It's nice to be the go-to person. It's nice to be the doer of all of the things.
>
> Which is why I think people can be hesitant to start delegating – because that means that you are not the go-to person anymore, or someone else has more knowledge than you do
>
> But that's actually a gift to both yourself and your organization to have someone better at it than you.

AMY APPLETON
VP OF MARKETING AT BELAY

HOW TO IDENTIFY DEFINING LEADERSHIP MOMENTS (AND WHY THEY MATTER)

TRICIA SCIORTINO

A mere three-hundred billion – that's *billion* with a *'b'* – years ago and *only* 100 miles or so below the surface of the Earth's upper mantle, things got hot.

And the weight of the overlying rock bearing down created immense pressure, so much pressure, in fact, that the combination of high temperature and high pressure caused molten lamproite and magma to expand rapidly, which then caused the magma to erupt, which *then* forced it to the Earth's surface, as well as some rocks.

In these rocks? Diamonds.

That's right. With *only* 1,650-2,370°F and just 45 to 60 kilobars – or around 50,000 times that of atmospheric pressure at the Earth's surface – we get diamonds.

Sounds simple enough, right?

The process of creating a diamond seems to defy every odd in order to create something so precious. So much time. So many extenuating circumstances. So much heat and pressure. Their existence is nothing short of a geological miracle.

And so it is with leadership. But not just any leadership. Not OK leadership. Not good leadership.

Great leadership.

Because if you're a leader, you *know* all those same transformative elements all too well: time, circumstance, proverbial heat and immense pressure.

Oh, *the pressure.*

But it's in those elements where great leaders are forged. It's in those moments – those defining leadership moments – that separate the rocks from the diamonds.

So how do you know if a moment is your *'molten-lamproite-and-magma-expansion-and-eruption'* moment? How do you know if a moment is your defining moment?

THAT WHICH DOESN'T BREAK YOU

Defining moments can help us become authentic leaders and harness what Harvard Business School Professor Bill George calls a leader's **True North.**

George explains that True North acts a leader's internal compass as they strive to become an authentic leader, and is centered on five key areas:

- Knowing your authentic self

- Defining your values and leadership principles

- Understanding your motivations

- Building your support team

- Staying grounded by integrating all aspects of your life

To appreciate this in context, think about a major milestone in your life – challenges, transitions, major influences and pivotal events – with honest self-reflection to identify these pivotal moments.

As it is explained, how you approached that particular challenge matters less than how deeply you choose to dig in to allow it to evolve you and (re-)shape how you define yourself today.

In her book with Wharton Professor of Psychology Adam Grant, 'Option B: Facing Adversity, Building Resistance And Finding Joy,' **Facebook COO Sheryl Sandberg** reflected on the sudden loss of her husband in 2015 – and how that reshaped the meaning in her life.

HOW TO IDENTIFY DEFINING LEADERSHIP MOMENTS (AND WHY THEY MATTER)

TRICIA SCIORTINO

About it, she said, "We plant the seeds of resilience in the ways we process negative events. After spending decades studying how people deal with setbacks, psychologist Martin Seligman found that three P's can stunt recovery: (1) Personalization—the belief that we are at fault; (2) Pervasiveness—the belief that an event will affect all areas of our life; and (3) Permanence—the belief that the aftershocks of the event will last forever."

As she grappled with her profound grief, Sandberg originally believed resilience was a fixed, finite capacity to endure pain.

Grant, however, **explained** that a person has no fixed amount of resilience, so the question instead became: How can someone become *more* resilient?

Resilience, as it turns out, is like a muscle and can be strengthened.

MAKING YOURSELF STRONGER

Life, as we all know well by now, isn't perfect. And as leaders, we know this well, too.

Just being alive is a known-and-assumed risk. Things can – and will – go wrong.

But even with our *years* of experience living an imperfect life, we are still left reeling from that which we should, by now, have come to expect: challenges, obstacles, the *unexpected*.

These unexpected moments, although wrapped in pain and frustration and disappointment, present incredible opportunities. Through the immense pressure, we are afforded the opportunity to …

- Take action and change
- Rise to the occasion
- Reveal our true values and purpose
- Identify the path we're meant to follow

- Discover our true strength and ability to lead *despite* the circumstances

And viewing these moments through the lens of opportunity – choosing to instead view it as something that has **happened for you and not to you** – precipitates the most important step: your transformation.

Simply put: How we choose to react and respond to a defining moment proves paramount.

Ask yourself:

- What's the bigger picture here?
- What am I reacting to?
- What does this situation mean to me?
- What would be the best thing for me to do?
- If this were happening to my best friend, what advice would I give them?

Lens, changed. Opportunity, presented. Growth, inevitable.

MIND(SET) OVER MATTER

Dr. Frances Hesselbein, former Girl Scout CEO and Presidential Medal of Freedom honoree, said it best:

"Leadership is not a matter of how to do, but rather a matter of how to be."

As leaders, we can catalog every defining moment as a touchstone to guide and inform our leadership evolution.

These defining leadership moments should serve as an enduring illustration of who you aspire to *be*, rather than what you aspire to *do*. And that mindset is all that stands between you and your next diamond-in-the-rough.

As featured **here.**

YOUR PEOPLE

Your people are your most valuable asset. They are your lifeblood. Your boots-on-the-ground. The wind beneath your wings. We could go on but … you get the point. And that's not just hyperbole. Your organization would, quite literally, be nothing without them. So here, learn how you can ensure their success.

Establishing, building and nurturing trust in the workplace isn't always easy – and arguably less so in a hybrid workplace – but with intentionality and commitment, it can yield a happier, more productive, and more engaged workforce.

As you've likely discovered, when you make the switch from leading in an office to leading a hybrid team, one of the things that you'll discover is that because you can't see your team and they can't see you, you both have to fill that space with trust.

As a hybrid leader, you must have faith in your ability to hire world-class employees and have faith in those rock star employees to do exactly what they were entrusted to do in the first place.

And here's how to do just that.

FINDING THE RIGHT TALENT

Our biggest piece of advice – one that has informed every hiring decision we've made when it comes to determining if someone is capable of hybrid work?

Never confuse availability with competency.

Beyond that guiding tenet, some traits to look for include …

- Self-disciplined
- Self-motivated
- Strong time management
- Confident working without supervision
- Laser-focused
- Resourceful problem-solver

- Organized
- Strong communicator
- Good working independently
- Good with connectivity tools
- Has a well-equipped, well-designed home office
- Working from home will give them the work-life balance they want

The reality is that you need to expand your workforce to accomplish your business objectives.

That means you need the *right* person in the *right* role – and that starts with focusing on the project or initiative you want to accomplish – rather than worrying about just filling a seat.

"

We're about two miles from the Houston medical center, which is arguably the best gathering of doctors in the world, and I've thought about staffing quite often like an organ transplant.

And … if you talk to transplant doctors – which I've done – and you say, 'So, what really separates the good ones from the best?' they'll all tell you the same thing: It's the tissue match.

It's one thing to find good donors, but the truth is you need a lung transplant. You can put a healthy lung into a healthy body but if they don't match, it's a bad ending for everyone – rejection.

WILLIAM VANDERBLOEMEN
CEO OF VANDERBLOEMEN SEARCH GROUP

Just because someone is available for the time you need them at the rate you can pay and for the tasks you need completed, it doesn't mean they are the best person for the job.

And in an ever-changing global workforce landscape, it proves even more critical to be discerning when hiring on-site and hybrid workers. Why?

Because when hiring, the emphasis should now be on the prospective employee being 'remote-first.'

That means that as you hire, you need to be sure that the candidate can work remotely. If they aren't a good problem-solver, struggle to troubleshoot, or aren't resourceful or independent, then they probably wouldn't do well working from home should your business model – or current events – dictate.

And that isn't sustainable.

When you invest in an employee, you deserve to get the best person. You deserve the best money can buy, and your employees deserve the forethought and consideration that sets them up for success, too.

So here are five tips to help you navigate the process of hiring a hybrid employee remotely to ensure that both you and your new employee succeed.

1 | HAVE THE RIGHT JOB DESCRIPTION & JOB POSTING.

If hiring a hybrid employee is your goal, be sure to include that detail in the job description. Seems obvious, but it's an oft-overlooked detail that is pretty critical. Include detailed language about your expectations and opportunities related to the hybrid nature of the position.

Then, when drafting your job posting, be sure that it emphasizes the need for timely digital communication skills. Further, your job posting should also specify equipment requirements that your hybrid employee will need to provide for themselves, like a laptop, high-speed internet access, a headset, virus protection – and more.

> You want to make sure your job description fits the person you want to hire.
>
> Too many times, people think they need one thing, put it in the job description, then realize too late they need something else.
>
> That's why really thinking about what you need, what gaps you have, and what you can delegate is such an important part of the hiring process.
>
> If that step isn't in place, then it will be really hard to find the right fit.

BROOKE CECIL
DIRECTOR OF CLIENT RELATIONS AT BELAY

2 KNOW WHAT TO ASK.

The right questions will yield the right answers, so make sure you're asking exactly what you need to know.

Standard interview questions just won't cut it here so create a list that includes specific questions about the environment in which the hybrid candidates will work, their time- and task-management skills, and how they handle or avoid distractions.

You'll also want to determine both their verbal and written communication skills as both will prove critical to the success of the partnership.

3 ARRANGE FACE-TO-FACE INTERVIEWS.

Don't be quick to discount the profound importance of body language and nonverbal cues.

According to Psychology Today, hardly anything transpires in our minds that is not reflected in our nonverbal communications. From emotions to bodily needs, to dislikes, to illness, to status displays, to intentions, our bodies are exquisitely equipped to communicate so by carefully studying nonverbal behavior, we stand to gain invaluable insight.

So use video for an interview to not only allow you to observe body language and other visual cues but to also give you a peek into the candidate's workspace. And while this may be an unexpected consideration, your first employee will also need to fit into your company culture, so a little facetime and eye contact will go a long way.

4 ASSESS BOTH SOFT & HARD SKILLS.

Since a hybrid employee will be lone-wolfing it at times, it's important to know that they have all of the skills necessary to succeed before you onboard – that's why soft- and hard-skill assessments are critical.

In fact, The Muse suggests giving them a skills-related test – like giving a candidate for a communications-heavy job a writing test. Such front-end skills assessments – that prove independence, follow-through, and problem-solving – can save you a lot of headaches on the backend by proving that your candidate has the skills and talent required to succeed.

At BELAY, for example, we evaluate things like listening, body language, emotional intelligence, communication, punctuality, business etiquette, attitude, social skills, and more through video interviews.

Then, through the skills assessment phase of our interview process, we measure competency in soft skills, such as communication and attention to detail, while also measuring hard skills through several questions and tasks tied to common administrative tasks our clients often request.

PRO TIP: Be sure to look for evidence of these skills in every step of the hiring process – from the initial application to the interview, to reference checks.

"

Fifteen percent of a person's financial success is attributed to technical skills (hard skills), while 85 percent is attributed to soft skills like communication, negotiation, leadership, etc.

Going back to Kindergarten, we were once graded on our ability to "play nice with others" or "share well" and so on. But not long after that, those types of skills were mostly forgotten about. We grow in education and technical skill and move on through our careers without ever really focusing on relations skills and how we interact with others.

As a result, many of us won't reach our potential unless we begin really doing a self-assessment and becoming more self-aware of how we are perceived.

STEVE HERZ
PRESIDENT OF THE MONTAG GROUP

Personality traits like ambition, passion, drive, and competitiveness will take a person far, but it's not enough for elite levels of success.

Even industry expertise or mastery of effective strategies will not consistently produce results. While basic skills are necessary, emotional intelligence and soft skills, like assertiveness and emotions management, are what enable top [employees] to customize their expertise and strategies.

Self-awareness is the starting point for developing emotional intelligence and empathy.

Becoming aware of ourselves enables us and our team to clearly draw the line between ourselves and others during interactions and respond productively.

"

COLLEEN STANLEY
PRESIDENT OF SALESLEADERSHIP, INC.

5 MAKE ONBOARDING HYBRID-FRIENDLY.

Whenever possible, bring your hybrid employee to your office or place of business for a week or two to get familiar with you and your company. Further, you should also verify that all of the technical equipment they'll need is ready to go before their start date.

But if in-office onboarding isn't possible, make sure you clearly communicate your expectations, encourage and foster relationships to ensure hybrid workers feel included, and always be available to offer help and answer questions. And remember to continually evaluate your **onboarding process**, including asking for feedback, to improve its efficacy.

Thanks to the internet and internet-enabled devices, hiring a hybrid employee is the way of the future – and the future is now. Your very first hybrid employee can execute all of the functions of in-house staff – and at a fraction of the cost (**THINK:** $2,000 saved per year by hiring a hybrid employee on average).

With a clearly defined job description and posting, the right questions, some eye contact, skills assessments, and thoughtful onboarding, you can begin to reap all that you've sown by your lonesome all while – *BONUS!* – creating a culture that will ensure that your first hybrid employee will not be your last.

> "
>
> Make sure you're looking for connections with culture.
>
> Does the person you're interviewing have questions for you? Do they have questions about the company? Are they passionate about your mission?
>
> If not, then you should see a big red flag in those situations.
>
> Few things are more stressful with hiring than bringing someone on, then realizing they are not a fit culturally. You should be getting a better sense of this with each interview. If not, you're probably not interviewing the right person.

KRISHA BUEHLER
CHIEF PEOPLE OFFICER AT BELAY

HOW TO START YOUR HYBRID RELATIONSHIPS RIGHT

When it comes to getting off on the right foot with your hybrid employees, it's mission-critical to be clear when communicating expectations from the onset. In no uncertain or gray terms, explain exactly what your expectations are of your employee and their role, specifically when it comes to answering the following questions.

- How much transparency is expected?
- How frequently?
- What level of detail?

Now, let's dive into common hurdles and obstacles — and how to avoid them.

Here's how to avoid common hurdles so you can start your hybrid employee relationships off right.

BEING WILLING TO TEACH – AND LEARN, TOO.

You can't teach – or effectively delegate – something you don't know and understand yourself. So this is your 'teach a (wo-)man to fish' step.

The best leaders are those who are willing to invest time in proper onboarding and training. Yes, this will require some heavy lifting on the front end but will result in an incredible return. Consider the time it takes to train and onboard your team as the most profitable investment you could make for yourself and your organization.

EQUIP PEOPLE WITH THE NECESSARY TOOLS, SKILLS AND INFORMATION.

"Train people well enough they can leave. Treat them well enough they don't want to."

Sir Richard Branson's got a point.

In business, training is often overlooked because the focus is on other important things, like sales, cash flow, marketing, and more. But there is nothing more critical to the success – or failure – of your business than your people. So as your company continues to grow and evolve, it must turn its attention, dollars, and resources to employee training.

And while training is massively important, you can't expect that all of your team members will value training or your company to the extent that you do as a leader. Again, it's much like parenting. They may not appreciate all that you do now but hindsight will grant them the gift of 20/20 vision. So our approach is to equip them so well that they could leave us if they wanted to – but they won't.

And they'll stay with you for so much more than just great training. They'll stay with you because the culture is consistent with their values. The work environment is fun. They feel a sense of belonging. They feel like the work they are doing is actually contributing to the greater good.

INVEST THE TIME.

Remember this is a marathon, not a sprint.

You and your team could — hopefully — work together for a long time, which means that just like a marathon, you'll need to invest time in training and preparation so you can see long-term success.

So while you may want to start seeing things getting accomplished right away, investing in the right preparation and foundation-building will set your team up for even greater success down the road.

UNDERSTANDING EXPECTATIONS.

Be sure to let employees and teams know from the beginning exactly what your expectations are of them, their role, and the team.

Also explain the shared and measurable objectives in no uncertain terms to eliminate the temptation to micromanage.

DEFINE HOW YOU DISCUSS & ASSIGN PROJECTS.

This is where a project management system – like Asana or Basecamp – works wonders.

Never worry again about the status of anything. It's all there for your review – and peace of mind.

Consider hosting weekly one-on-one calls to proactively discuss delegated projects, questions, or concerns, and hosting bi-weekly or monthly all-calls with everyone on your hybrid team to update each initiative's status. These are your opportunities to address any questions to get – and keep – everyone on the same page.

USE COLLABORATIVE COMMUNICATION TOOLS.

When in doubt, over-communicate.

More is more when it comes to establishing clarity, expectations and directions. Establishing a clear delegation communication plan while working remotely will open the door for conversations, coaching opportunities, and constructive feedback.

We suggest calls, texts, or voicemails for casual conversations, and using collaborative tools, like Basecamp or Slack, to emphasize a deadline or celebrate an accomplishment.
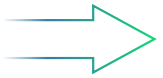
DETAILS MATTER: WHERE DO YOU KEEP THEM?

Small, seemingly inconsequential details add up – big time – when it comes to the successful completion of delegated responsibilities.

To help keep your team organized, document everything – maybe in a collaborative project management platform like Trello or Basecamp – to create a chain of communication that everyone can reference. Upload emails, documents, images, and other files so everyone can access them as needed.

BE INCLUSIVE.

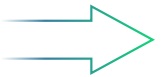It's important to include all involved parties on emails when there are important decisions to make or tasks to complete for a particular project or initiative. Make sure everyone knows what has been completed and by whom, and communicate the status of each project as it's handed off.
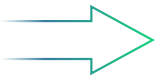
DIVIDE-AND-CONQUER.

When it comes to delegating effectively, it's important to remember that each person on your team plays an invaluable role in the completion of projects, tasks and initiatives.

You can also consider breaking each project, task and initiative into smaller deliverables so people can get in where they fit in, choosing the right tool – or employee – for each job.

RESOURCE

How to Start Your Remote Relationships Right: A Checklist

BUILDING TRUST

Think about the worst leader you've ever had. What words would describe them?

We'll go first: Micromanaging. Manipulative. Dishonest. Opportunist.

OOF.

And those are just the obviously bad ones. But what if you had another blind spot – a not-so-obvious, *seemingly* innocuous one – that interfered with your ability to be the incredible leader you want to be?

Because more often than not, blind spots are not only prevalent among high-achieving leaders but are often viewed through the warped lens as being positive attributes.

Let us be the first to tell you: These are decidedly *not* compliments.

'Few things can help an individual more than to place responsibility on him, and to let him know that you trust him.' – Booker T. Washington

So there is one thing – one oft-overlooked and neglected little thing – that, if cultivated and nurtured properly, can change the course of your business. Think you know what it is?

Here's a hint: It's not synergy. It's not culture. It's not brand identity. It's not foosball in the breakroom.

It's *trust.*

All of the aforementioned things are decidedly and categorically critical, and the foosball table is definitely awesome – don't get us wrong – but all of those can't exist without trust. Trust and just about every other mission-critical element of your business' success are mutually inclusive; they simply cannot exist without trust.

> Micromanaging your team makes it appear that you don't trust them, which will eventually lead to them not trusting you.
>
> If you have a solid, healthy hiring process, trust that process to bring you the right people who will allow you to do what you do best.

TRICIA SCIORTINO
CEO AT BELAY

So we have a guiding philosophy – one seemingly small approach to trust – that yields a *huge* impact: We choose to fill *all* gaps with trust, knowing that we are all here to serve one another. We even encourage filling the gap with trust even *before* you feel like someone has earned it.

Sounds crazy, right? But from day one, if you fill the gap with trust, the momentum will pick up *big time* in your relationships.

But – and this is a relatively big *'but'* – this does come with a big caveat: It comes with recognizing that mistakes *will* happen.

Not if; *when*.

And even then, what do we call on each other to do? We encourage each other to – yet again – fill that gap with trust and really believe the best in that person.

Why? Because we *all* make mistakes. And just as we've been instructed by the Golden Rule, we forgive because we, too, want to be forgiven.

Building a culture of trust is the single most important goal you can have as a leader. Employees in high-trust organizations are more productive, more energetic, more collaborative, stay with their employers longer, and take ownership of their work and the outcomes as a whole.

Think it sounds like new-age, nebulous, nuanced corporate-speak? Think again. Consider that employees in self-described 'high-trust workplaces' **report** that they are …

- 106 percent more energetic at work
- 76 percent more engaged with their jobs
- 74 percent less stressed
- 13 percent less likely to take sick days
- 29 percent more satisfied with life in general*

* *'With life in general'* is important to note as every aspect of our lives is connected and interwoven. Our professional lives and personal lives don't exist in vacuums.

These are remarkable statistics, giving tangible, quantifiable weight to an otherwise abstract *feeling*.

When it comes to trust, we believe one thing to be true: Trust begets trust. And when you make the switch from an office to working remotely, one of the things that you'll find as a leader is that because you can't see people, you'll have to fill that space you've given your team with trust.

Because let's be honest: People don't show up to work to fail. People don't want to let you down. They didn't come to work and say, 'You know what? I think I'm not gonna make my goals today, and I'm just going to mess everything up.'

Sure. Someone fell short of expectations. As a leader, that's your opportunity to create moments where people can share, celebrate each other, and over-communicate while honoring everyone in the process. We will cover how to have those courageous conversations in our chapter on communication.

So take that leap of trust – trust in your ability to hire world-class employees and their ability to do exactly what you entrusted to them in the first place – and be prepared to reap the rewards.

RESOURCES

Evaluating Trust: Worksheet

How To Build Trust: A Checklist

> Trust is the foundation of everything.
>
> If you don't feel like the other person cares about you and is invested in you, then that relationship won't work. That's why communicating in a way that makes people feel connected and trusting of you is so important, whether it's at home or in the workplace.
>
> Sometimes, poor communication can go back to a lack of warmth — something as simple as your tone of voice can affect how others view you.

STEVE HERZ
PRESIDENT OF THE MONTAG GROUP

MAINTAINING TRUST

Trust is a fundamental, foundational building block in any relationship – both professional and personal.

Your employees were hired for a reason, right? So communicate your expectations, give feedback, and then – this is the tricky part – give employees the freedom to leverage their particular strengths.

COMMUNICATE EXPECTATIONS.

Be sure you're clear from the onset exactly what expectations are of your employee and their role, specifically when it comes to availability, productivity, and meetings.

GET FEEDBACK.

Your employees are the only ones who can tell you where you hit the mark and where you fall short of your hybrid culture – so ask them.

Then – and this is critical – listen.

Their insights will be invaluable in helping you decide to stay or correct course. We use company-wide surveys to gauge the health of our culture at BELAY.

Sometimes these aren't anonymous because we want to address them anytime we miss the mark properly. We treat our team like the adults they are, so we expect them to do the same when we ask them to give us feedback in their own words – even when it's not easy.

Accepting and adapting to feedback from your employees is the difference between talking the company culture talk and walking it.

RESOURCE

How To Maintain Trust: A Checklist

INSPECTING WHAT YOU EXPECT:
THE IMPORTANCE OF YEAR-END REVIEWS
TRICIA SCIORTINO

It's just about that time again.

As we round the corner to Q4, the reality hits that it's time for year-end reviews.

Maybe some of you are rejoicing right now because they're your jam. If so, more power to you! But for the rest of you who may have grumbled or let out a defeated-but-knowing sigh, fear not.

But listen. Let's address the elephant in the room.

Year-end reviews are work. They're time-consuming. And sometimes, they're hard. Awkward, even.

But something else they are? Absolutely, non-negotiably necessary. Why? Because experience doesn't make you wiser. *Evaluated* experience makes you wiser.

So my goal today is to help you learn how to conduct a year-end review – one that focuses not just on financial performance but team performance and organizational culture.

I'll outline a few things you can do on your own or with your team to wrap up and review the year to help you maximize what you learned from this year, remind you of all that you accomplished, and give you something to go back and celebrate with your team.

WHY METRICS MATTER.

Metrics help leaders see and understand the greater narrative in business. They help you discover the bigger story through mistakes and successes when we pause to evaluate them.

Put simply, it's hard to clearly see where you're going when you don't know where you've been.

But surprisingly, I've worked with thousands of leaders and business owners and the *majority* of them don't do a year-end review.

Why?

Because they're not organized. They don't have good habits. And they don't have a process in place. Maybe they don't even have goals or they're completely unclear on what they are as an organization.

That's not to suggest they're not good leaders. They're probably good at a certain area of the business. Maybe they were the visionary to create the business but at the end of the day, they fall short when it comes to actually reviewing the metrics and diving down into the lessons and celebrations from a year of success that they had.

But success means measuring, monitoring and reviewing things so that you can continue to grow and make right decisions. It means inspecting what you expect.

Without metrics, you can't make the right decisions if you don't know how you ended up where you are in the first place.

THINGS TO CONSIDER BEFORE YOU REVIEW

So you're feeling motivated. Inspired, even. Let's keep that momentum going – while considering three important factors:

1. Know Your Why.

Start by having really clear goals and a vision for each year.

It's not just about making X amount of profit, but how are you going about making that profit? How do you plan to go from where you are to becoming even better – the best in your industry or community? How many new clients do you want this year?

INSPECTING WHAT YOU EXPECT: THE IMPORTANCE OF YEAR-END REVIEWS

TRICIA SCIORTINO

This is about taking your vision and putting a plan on paper to get there, making sure you continue to review and measure along the way.

If you don't do that, how do you know if you're making progress or faltering?

2. Expect Failure.

Don't be afraid to mess up – because inevitably, you will. We all do.

Spend time each year looking back on what went wrong and what you might need to stop doing. These are the things that provided little to no ROI and maybe sounded great on paper but just didn't pan out.

Don't continue doing the same thing if it isn't working, even if *'you've always done it that way.'*

The key here is to be honest with yourself, your team, and each other in assessing all the different elements of your company, like products, processes, and more.

3. Prepare To Be Transparent.

At our weekly staff meeting every Monday, I share different metrics and give a quick 10-minute 'State of BELAY' address.

Why? Because I choose to treat my team like adults.

When you do, you'll gain their respect and you'll never catch them off guard when there's a big announcement or something changes.

Give revenue updates, hiring news, contractor pool updates, and information about where there might be gaps.

This is also a great time to share positive news and rally the troops. Do all this so when you

get to the end of the year, everyone will pretty much already know whether it's been a good year or not. There will be no surprises.

PUTTING RUBBER TO ROAD

Now, it's time for the next step – finding a review that works for you and your organization.

To start, you'll just need a simple template with key questions to ask and areas of the business to consider as you reflect on the year.

In each section, jot down your thoughts by yourself – and encourage everyone to fill it out and share their perspective, too.

And with that, you're one step closer to gathering the metrics you need to unlock limitless growth and opportunities for yourself, your team and your organization.

DON'T MICROMANAGE.

Are your employees self-disciplined and self-motivated? Can they get it all done without the fear of you catching them scrolling on social media? Because while they can – and will – be tempted to throw a load of laundry in the wash, you'll still need to trust that they will do the job for which they were hired — without your micromanagement.

BE LASER-FOCUSED.

It's hard to resist the siren song of every ding, ping and ring of every email, social media notification and text message that tries to interrupt your flow, so laser focus will be all that stands between you and your productivity.

BE ORGANIZED.

Without face-to-face interaction – and fear of judgment of your messy workspace – it's easy to let things slip through the cracks, literally and figuratively. You'll need to be super organized to stay on task.

TECH SAVVY.

File under: Does Not Compute. Hybrid work isn't compatible with technological ineptitude as audio and video conferencing, instant messaging, and other online meeting tools are mission-critical connectivity tools.

Gut-check time: Ask yourself …

- What are you doing to foster great culture?
- Are you extending trust?
- Are you a micromanager?
- Are you treating adults as adults?
- Are you filling gaps with trust?
- Are you asking about tasks in a way that reflects trust or accusation?

> "Trust isn't something you either have or don't have. You can actively build trust every day.

DAVID HORSAGER
CEO OF TRUST EDGE LEADERSHIP INSTITUTE AND THE BEST-SELLING AUTHOR OF THE TRUST EDGE

THE IMPORTANCE OF MEETINGS

At BELAY, we highly encourage video meetings. Because in the hybrid world, most expect to be heard and not seen.

But when you have video meetings with your clients and colleagues, you add another layer of trust to your relationship and make 'virtual' feel more personal.

Video conferencing is – and always has been – a requisite for us and our clients. We've made it mandatory because, without it, we can't read body language, make eye contact, or forge any sort of a real connection. And a company's productivity is determined by its ability to communicate.

Well-structured video meetings can yield the same productivity as in-person meetings.

RESOURCES
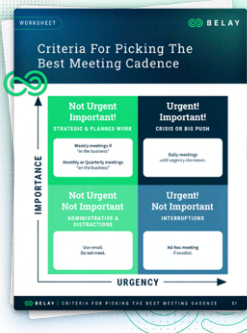
Criteria for Picking the Best Meeting Cadence

Recommended Meeting Cadences for Different Teams

1:1 Agenda: Template

Giving Feedback: Worksheet

WORKING FROM HOME:
WHY ONE-ON-ONES ARE SO IMPORTANT
TRICIA SCIORTINO

We get this one *a lot.* And we get it – in a brick-and-mortar setting, routine one-on-ones aren't common practice.

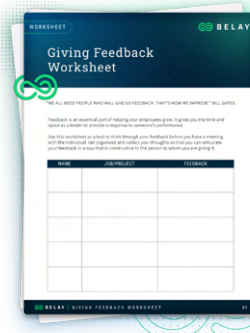But if you *really* think about it, impromptu one-on-ones happen in an office setting *all day long.* As people walk by cubicles. Pop-ins to offices. Chats by the watercoolers. Catching up in the breakroom.

They happen probably far more often than are even ever noticed. But they provide priceless spontaneous communication and connection moments that aren't necessarily afforded to those who work from home.

So what can be done? No worries – I got you!

But first, raise your right hand and repeat after me: *I promise to make one-on-ones with colleagues a priority.*

Seriously, please, please, *please* make one-on-ones with your colleagues standing meetings, or block time *every single week* where you know you're going to get face-time via Zoom, for example.

This is *critical* to the success of a work-from-home engagement. This is our time to ask questions, talk through priorities, get clarity where needed, and make sure that they're moving the ball down the court – and that requires some recalibration.

Some things that were priorities last week may no longer be priorities for this week. And these conversations really help uncover that. Also, you can share feedback with one another because feedback often just doesn't translate well via email or a voicemail or text.

So having those conversations eyeball-to-eyeball is super productive, builds the relationship, and creates a real sense of honesty where you can share and receive feedback.

Make this time a priority for your work-from-home engagement and it will truly help your momentum, that of your team and your organization.

As featured **here.**

YOUR PEOPLE WRAP-UP

By design, hybrid culture is laid squarely on a foundation of trust.

So as more organizations move toward a hybrid workforce, managers must be adept at learning to fill gaps with trust.

Trusting isn't easy – at least it doesn't start that way. It takes practice and commitment and can be the difference between accelerated growth and stalling out.

To recap how to trust your hybrid team, be sure to …

- Delegate to benefit from the powerful, multiplying effects of entrusting others to do that for which they were hired.

- Build trust by believing in the good intentions of all people and leading with good intentions.

- Maintain trust by communicating expectations, giving feedback, and granting employees the freedom to leverage their particular strengths.

- Start your hybrid relationships right by expressing — in no uncertain terms — exactly what your expectations are of your employee and their role.

- Recognize the importance of 1:1 meetings as a time to ask questions, talk through priorities, get clarity where needed, and make sure that they're moving the ball down the court.

YOUR PRODUCTIVITY

What do you, Beyonce, Bill Gates, the Dalai Lama and Tom Brady all have in common?

Bank accounts? Swagger? Elite athletic abilities? The spiritual leadership of Tibet? So close.

Answer: They all – we all – have 24 hours in each day.

And 24 hours just isn't enough to cut it most days. So how can you and those you lead prioritize and guard your time, set boundaries, and be more productive at work?

You've come to the right place.

Because maximizing productivity comes down to — in large part, anyway — strategizing your week by prioritizing your tasks to schedule time for meetings, activities, appointments, deep work, and administrative duties.

It also includes blocking for fundamental items like project work, scheduled days off, and even fitness or other health goals.

And here's how you can do just that.

CREATING YOUR IDEAL WORK WEEK

RESOURCE
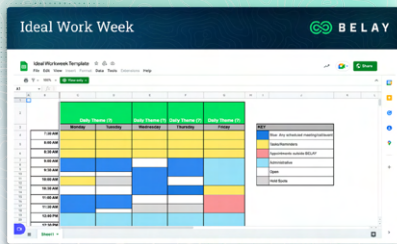
Ideal Workweek: Template

Thinking through your goals and getting an idea of your week-at-a-glance can increase productivity and help you stay on track to meet goals efficiently.

So here, we will work through the jar analogy of filling a jar with rocks, pebbles, and sand that represent all the things a busy leader needs to complete every week.

"

We see very few examples of people who are managing [balance] the right way. With intentionality and planning, you can actually be successful at work and home. It's not a myth.

[So] put hard constraints on your time.

Many of us start with "what do I need to do, and how long is it going to take?"

That cycle will never end. Instead, use the approach of putting hard edges on your day, whether it's working a strict set of hours, not checking your phone and email at home, and advising your team only to contact you at home and on weekends in case of emergency (making sure you define what "emergency" means!).

This isn't just in your best interest, but in your entire team's best interest — because it allows you to unplug, recharge, and focus on your family, avoiding the long-term burnout so many leaders eventually face.

MEGAN HYATT MILLER
COO AT MICHAEL HYATT & COMPANY

START WITH YOUR BIG ROCKS.

Some of you may already be familiar with the rock, pebbles, and sand jar analogy that explains that our time is like a jar.

And in this jar, we must find room for all our rocks, representing the most important projects and things we have going on; the pebbles, representing the things in your life that matter, but that you could live without; and the sand, representing the remaining filler tasks.

At first glance, it seems that all of the things you need or want to do won't fit. But, when placed strategically, starting with the biggest rocks, everything can — and will — find a place.

Here's how it works with your Ideal Work Week.

To create your Ideal Work Week, we are going to start by identifying immovable appointments, like meetings, and top priorities, like family, and place them on the calendar first. These serve as anchors for the remainder of your planning. Beyond meetings, this is where you will also account for activities like dental appointments, scheduled days off, and other previously designated engagements.

In an ideal week, your calendar will have a sprinkling of these heavy-lifters, leaving ample room for everything else that needs to be done. Too many meetings will hinder productivity so schedule sparingly.

When placing these tasks on your calendar, be sure to account for travel or set up time as a part of your schedule. Whether you are walking to the conference room, commuting across town, or setting up a Zoom meeting in your office, the only way to ensure you will start your meeting on time is to plan in a few minutes for travel and set up. And don't forget to reallocate your saved commute time as you see fit!

START WITH YOUR BIG ROCKS.

NEXT, ADD PEBBLES.

Once you have your anchors in place, you will have a much more visual view of the time that remains in your week. Resist the temptation to start filling in the white space with random tasks that need to be completed. Similar to the sand and pebbles, a strategy is still necessary to finish out your week successfully.

Filling out the next pieces of your productivity calendar takes some care and planning. First, determine when you are most productive. Is your brain engaged in the morning when you first start your day? Or do you find yourself getting more work done in the afternoon? Whenever you are most productive, this is the time to work on your pebble projects.

Project work (setting small goals to reach one big one), administrative duties, meeting prep, strategizing, and paperwork all fit into this category. Although no less important than meetings and the previously set tasks, these are a little more fluid. They can be moved around and spread throughout the week as needed.
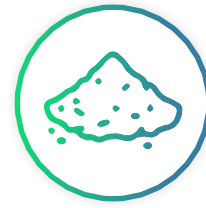
TIP: Think backward by starting with where you want to be at the end of the week and plan accordingly. What are your goals for the week? What needs to be done each day to create a "win" by the week's end?

START WITH YOUR BIG ROCKS.

NEXT, ADD PEBBLES.

FILL IN THE CRACKS WITH SAND

The sand represents all of the small items that fill up your day, some are important and some may be unimportant. This is when you need to get specific about the little bits of time you have remaining.

These tasks include:

- Email
- Phone Calls
- Social Media
- Coffee with a friend
- Self-care activities, like going to the gym

Now that you've created your ideal week, live it out. Communicate to your team that they might see some adjustments to your schedule or meeting times and that you are working to give them your attention when you are at your best.

> "
>
> The key to successfully transitioning to remote work is team members and leaders establishing a new flow for their day and week. Much of the organization's rhythm is dictated by everyone arriving and departing at the same time.
>
> Leaders can help their teams by defining key elements of the workweek, such as times when everyone is expected to be available, when no one is allowed to schedule meetings, and when everyone gathers for company-wide or department meetings.
>
> With just a few constraints, team members can begin developing a new structure and rhythm to their work.

TROY POLLOCK
CHIEF AMBASSADOR AT PUSHPAY

STRUCTURE YOUR DAY AND SPACE

Listen. We won't even bother rhetorically asking if you often find yourself feeling overwhelmed by every ding, ping, and menacing red-number notification on your every device. We already know the answer.

Because if you're anything like anyone else living this side of the 21st century, all of the instant-ness of our digital world is enough to drive you mad.

You need boundaries.

Working remotely certainly has its perks, but often, it's hard to turn work off and turn life on – like fully present 'on' – so here are a few ways you can lead your employees to separate business from pleasure – even when it's all under the same roof.

TRACK YOUR TIME TO FIND YOUR TIME WASTERS.

First things first: Complete at least one day of time logging.

From the moment you wake up to the moment you go to bed at night, list every task and the total amount of time spent on it. This way, you'll have a solid baseline for what occupies your time. Once you know that, you can move on to the next time management skill.

IDENTIFY & ELIMINATE TIME-WASTERS.

Identify what your time sucks are according to your time log.

Then, you need to find ways to avoid them. For example, if you waste too much time on social media, set up a blocker for those sites. If you spend too much time on emails, set a time limit on emails each day.

RESOURCES
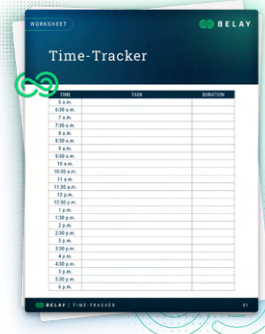
Time Tracker

Minimize Distractions & Time Wasters

TRY THE POMODORO TECHNIQUE.

This technique involves setting a timer for 25 minutes while you focus on one task, then taking a five-minute break before starting the next.

This technique is especially effective if you have trouble focusing, structuring your time, or if you want to make sure you devote enough time to a particular task.

AVOID SHINY OBJECTS.

This phenomenon is also known as 'SQUIRREL!'

Much like a barracuda, we are often – and easily – distracted by 'shiny objects.' Shiny objects — like the allure of a social media notification or a dishwasher that needs emptying — only distract us and pull our time and attention away from tasks that matter. See a shiny object, admire it, if you must … then keep moving forward.

SET A SCHEDULE – AND STICK TO IT.

This is when your Ideal Work Week really pulls its weight.

With it, organize your time based on your set priorities while accommodating specific tasks for that particular day.

DON'T MULTITASK. SERIOUSLY.

Somewhere along the way, *'multitasking'* was exalted on high, right smack dab next to *'busyness.'*

And while we've been led to believe that multitasking is the holy grail for effective time management, it's decidedly not.

The reason is simple — and scientific: Our brains are not designed to work on multiple initiatives at one time. As such, monotasking not only cuts down on silly mental errors but can help unleash your creativity and productivity since you can focus more attention and energy on the task at hand.

So pick one task, and stick with it – and nothing else – until you complete it.

AUTOMATE.

'There's an app for that.' Literally.

For every difficult, time-consuming, or tedious task, there is a seemingly endless number of automation apps, programs, and online services available. Let the 21st-century help shoulder some of the burdens and use automation.

REMEMBER TO REST.

Sometimes, it's in our quietest and stillest moments that our minds breathe and expand – often yielding our most intellectually productive moments.

Think of it like this: If you've ever tried in vain to remember someone's name or the words to a song, you know that it often comes to you when you stop forcing yourself to remember.

With these tips, hybrid organizations can be highly productive during working hours — and really 'off' during their personal time.

RESOURCE

How To Say No Nicely Mad Libs

COMMUNICATE, TRUST, AND CELEBRATE DELEGATION

In business, delegation – effective delegation specifically – is a mission-critical skill. And as more organizations move toward a hybrid workforce, leaders must be adept at delegating.

But delegating isn't easy – at least it doesn't start that way. It takes practice and commitment and can be the difference between accelerated growth and stalling out.

Delegation isn't simply a way of unloading your responsibilities; it's how business owners and leaders can benefit from the powerful, multiplying effects of entrusting others to do that for which they were hired.

As you delegate, you not only free yourself from a busyness mountain of your own creation, but you also, in turn, develop the kind of employees and leaders that allow you, them, and your business to grow.

"

Don't just promote leaders; help [employees] grow into one.

You can do that by helping them understand what it means to be a leader, what it means to be a better person. That takes time. It's an investment. True mentorship isn't just about passing along a book to read. It's about building relationships that foster growth.

LISA ZEEVELD
CFO AT BELAY

IDENTIFY WHAT YOU SHOULD – AND SHOULDN'T – DELEGATE.

The most important outcome of delegation is giving you the time and space to focus on doing what only you can do. The 80/20 rule says that 80 percent of your results come from 20 percent of your efforts, so effective time management suggests that you spend 20 percent on the task(s) that will yield the greatest results.

With that in mind and to help you get started on the right foot, we've created a Delegation tool to help you map out the various things you do each day so you can determine what you keep and what you give away. We'll show you how to use that tool in the next section.

IDENTIFY THE PEOPLE WILLING AND ABLE TO TAKE ON MORE.

This is arguably one of the most mission-critical steps because it can stretch our comfort zone to delegate tasks that are important to someone on your team. How do you know if you're delegating the right tasks to the right person?

ENTER: The 70-percent rule.

Seems like we have a lot of number rules, huh? Well, this rule says that if the person you'd like to perform the task can do it at least 70 percent as well as you can, you should delegate it. By explaining the desired outcome and setting check-ins, you can ensure the result is as good – or even better – than if you completed the task yourself.

RESOURCES

How to Know Who's Ready to Take On More

Delegation: Worksheet

Must. Could. Should.

COMMUNICATE. COMMUNICATE. COMMUNICATE.

A survey found that 86 percent of respondents named communication as their key issue. Try catering communication to the style each employee prefers to help them stay connected in the manner that best suits – and motivates – them. Communicate all necessary information upfront when delegating tasks, such as deadlines, any processes that need to be followed, people to include on communication, and any known roadblocks they might encounter. This sets your team member up to accomplish the task you are delegating successfully.

GIVE A WIDE BERTH.

This is where things can feel vulnerable and maybe even scary.

This step is essential, but also the most challenging. From this point on, it's imperative to have faith in your delegation process and people.

So while it may be hard to let someone else take the reins, fear not! Because if you committed to the first three steps, you and your team should be primed for this very moment.

This is when you fill the space you've given with trust, turning tasks over to your employees once they show consistent decision-making and reliability.

CELEBRATE WINS, BIG AND SMALL.

Not every accomplishment on this journey will warrant ticker tape and a parade. Some wins will be small – but a win is a win and merits recognition.

And thankfully, even the smallest gesture – like saying 'Great job!' – can go a long way in motivating your team. Similarly, never underestimate the power and impact of manners. 'Please' and 'thank you' still go a long, long way.

And listen. We're not trying to sugar-coat anything so we'd be remiss if we didn't mention those times – may they be few and far between – when things don't go as expected. It happens. But do you know what mistakes are?

Diamond-in-the-rough opportunities to continue building trust through open, honest communication and repeated efforts. There's no winning-and-losing here; just winning-and-learning.

YOUR PRODUCTIVITY WRAP-UP

Working and leading from home has its obvious perks: No commute. No weather delays. No chatty colleagues or micromanaging bosses patrolling the hallways.

But what many may not realize is that productivity can actually soar for hybrid employees who work from home. The key to success when it comes to working from home, however, is making sure you establish and then maintain ways to be productive – even when life's most tempting distractions come calling.

To recap how you can lead your team to maximize productivity when working remotely, be sure to …

- Create your ideal workweek to manage your energy, guard your time, prioritize your work for maximum productivity and manage your schedule to work more efficiently.

- Structure your day and space to be able to turn work off and turn life on – even when it's all under the same roof.

- Communicate and delegate to benefit from the powerful, multiplying effects of entrusting others to do that for which they were hired.

"

Clarity is always key, and you can't have clarity without communication. You need to have articulated the right steps, the deadline, and a clear example of the outcome.

The worst situation is when someone has been delegated something but doesn't have any details. There's no way they can be successful. Always communicate.

MATT SEATON
VP OF OPERATIONS AT BELAY

YOUR COMMUNICATION

Communication is critical, but even more so in a hybrid workplace. So establishing clear communication will open the door for conversations, coaching opportunities, and constructive feedback.

And here, you'll learn to do just that.

Because after more than 11 years in business as a 100-percent remote workforce, we believe in over-communicating – and believe that we need to communicate even more.

We've all been there: We say one thing, but the person we're speaking to hears and interprets something else entirely.

And so you really have to be very conscious about how you're communicating – and even more so when working remotely.

HOW TO BE A BETTER COMMUNICATOR

Communication – clear, explicit and thoughtful communication – is, at least for us, the foundation for, well, everything when working remotely. Because regardless of industry, job or even whether you work in a brick-and-mortar office or virtually, how we express our expectations and needs inevitably impacts and affects every outcome.

In some cases, teams are so geographically dispersed that they collaborate while in different countries or continents, let alone time zones. But when traditional, office-

based teams begin to spread their wings and welcome hybrid workers aboard, there can be some learning curves to navigate.

And as discussed earlier, quality onboarding for new employees increases the likelihood of retention. Increased performance, higher productivity and elevated employee engagement also correspond with purposeful introductory experiences.

So for hybrid employees, leaders must be decisive and proactive in following a game plan that heightens the odds of success and satisfaction for all involved.

This calls for open communication, a sense of shared purpose, and a commitment to growth.

After all, the one tie that binds us all is our need to connect. We need to feel seen, heard, and understood. And just how, exactly, do we do that? By continuously asking yourself and those around you: "How can I be a better communicator?"

So here are a few common obstacles to creating open and productive lines of communication – and how you can overcome them.

"

There are three primary categories for internal communication — pre-communication, ongoing communication, and pull-push communication.

Pre-communication is the standards you communicate to team members about how you operate and your expectations of them. Pre-communication typically takes place during onboarding and is outlined in the employee handbook and job description, and it's the most important category of communication as future issues often arise due to lack of pre-communication.

Ongoing communication is your organization's approach to recurring and one-off meetings, specifically your cadence and policy — what meetings happen when, how often, and why. These meetings include all-hands, staff meetings for large groups, project meetings for small groups, and one-on-one meetings for check-ins. However, what's most important is giving yourself and your employees opportunities to connect as an entire staff, as teams or departments, and one-on-one between the leader and their direct reports.

Pull-push communication is your organization's process for bottom-up communication. To do this well, the EntreLeadership team recommend requiring every team member to complete a weekly report for their leader sharing what they worked on and accomplished during the week as well as high points and low points. By doing so, employees know they'll always have an opportunity to communicate their concerns and leaders know they'll always have visibility into their employees' work.

DANIEL TARDY
EXECUTIVE VICE PRESIDENT OF ENTRELEADERSHIP AT RAMSEY SOLUTIONS

UNDERSTANDING ROLES AND FUNCTIONS

Working from home has its positives, but sometimes the very structure of a hybrid position inadvertently triggers distance in one's knowledge bank. The offsite worker may not get a sense of the real ins and outs of people's roles. They may benefit from greater clarity about positions and functions at the outset.

THE FIX Coordinate times for your hybrid team member to talk with onsite staff in their early days on the job. This builds rapport and fosters understanding about different roles and moving pieces within the organization. Create affinity that will help the entire team be more effective, engaged, and extended in their interactions with one another.

PROFESSIONAL DEVELOPMENT

Sometimes offsite workers begin to sense that out of sight is out of mind if they miss out on professional development opportunities. This may occur in the form of casual in-person mentoring by a senior team member to more structured training, such as industry seminars, annual group meetings, or special conferences.

THE FIX Include hybrid employees in your annual professional development budgets. Invite them to travel to attend industry events or conferences, particularly if other staff attend similar occasions as well. Don't forget about other venues for continuous learning, such as webinars and virtual events.

STAY CONNECTED

Remote work has its positives, but a common shortfall is that there isn't a breakroom or water cooler for everyone to recap their weekend. People enjoy connecting. They need it and seek it out. As President Theodore Roosevelt once famously said, *"No one cares how much you know until they know how much you care."*

THE FIX Schedule times at the beginning of team and 1:1 meetings to talk about non-work items to build rapport and foster connections.

AN ATMOSPHERE OF INCLUSION

Another possible hurdle arises when you have people in an office as well as remote workers. Your hybrid team might miss out on in-office conversations about projects or quick decisions made. Additionally, when people work remotely, they can feel excluded or disconnected interpersonally – whether intentionally or circumstantially – from daily activity to which they grew accustomed that would build camaraderie.

To guard against this, use collaboration tools where people can record when a decision is made. Then notifications can be sent to the whole team, regardless if they are onsite or hybrid.

THE FIX Share funny happenings and work highlights with hybrid team members, even if they didn't witness or in any way participate in the episode. Bring them up in watercooler conversations via instant messaging apps. Ask the hybrid employee about any humorous moments on their end or just highlights from their week. This kind of interpersonal sharing can foster an atmosphere of inclusion and intimacy.

BEING SEEN & HEARD

Hybrid workers want to be entrusted and empowered to do their jobs, but that can also lead to isolation from you, their leader. This can result in them waiting until scheduled meeting times to ask an important question or telling you they need help.

Use instant messaging tools or email to check in like you would if you passed them at the office with a quick *"How's everything going?"* or *"Anything I can help with?"* This keeps the lines of communication open without micromanaging.

Embed visual technologies, like videoconferencing and the use of webcams, into your practices. Be careful not to create a culture where hybrid workers feel put "on the spot," designate meetings for which all in attendance are expected to be camera-ready for their close-up.

EXPECTATIONS

Often, hybrid employment can leave an understanding of roles and functions clear as mud. Working from home has its positives, but sometimes the very structure of a hybrid position inadvertently triggers distance in one's knowledge bank and creates silos of productivity.

Coordinate times for your hybrid team members to talk with one another regularly, both as a team and individually. This builds rapport and fosters an understanding of different roles and moving pieces within the organization. It also helps the entire team be more effective, engaged, and intentional in their interactions with one another.

EMBRACE BIDIRECTIONAL FEEDBACK

New hybrid-team leaders often make the mistake of assuming everyone is on the same page. Leaders with hybrid teams need to have regular feedback loops, but they need to be careful to not treat feedback as a one-way street. The best leaders invite all team members to provide feedback, not just receive it.

If delegates are hesitant to do so without being prompted, ask them questions directly.

"Am I being clear enough when giving assignments?"

"Are your professional needs being met?"

"Is there something I can do to improve our working relationship?"

Even if a delegate has nothing but good things to say, the invitation to share is meaningful in itself. It shows that you value the relationship and see your delegate as a collaborator.

COMMUNICATION 101: WHAT TO USE - AND WHEN

Whenever possible, we try to cater communication to the style – or styles – each employee prefers to help them stay connected in the manner that best suits them. While some may prefer video conferencing, others may prefer written communication.

And as an organization, you have to have all the right communication tools, but you also have to set some expectations that go around that, too.

And as we mentioned, we over-communicate – meaning we embrace the 'virtual nod' to let people know we're 'on it.' Here are all the ways we communicate — and when.

EMAIL

We like to say that we use 'email as the pillar, and instant messaging as the glue.'

Let us start by saying that it's such a wonderful tool. Everybody has it on their phone and computer. It's quick and it's easy.

RESPONSE TIME | However, the problem with email is that sometimes you don't get the immediate response you expected – and that's when the 'virtual nod' comes into play.

That means we've set an expectation on how soon we expect somebody to read that email. Often, a 'virtual nod' isn't necessarily an answer but a means of communicating, 'I have this. I'll get back to you.' – and setting that expectation, acknowledging the sender, letting them know that you see them, and expressly communicating when they can expect a response.

The worst is when you send an email – we've all done it – and look at your watch. It's been three days, and you've heard nothing, right?

TONE | Another important email consideration is tone. We're sure you've experienced this, albeit in an email or text. So much can be lost in interpretation when a recipient has to infer the tone of the sender.

So make sure that you're speaking appropriately. Watch the number of emojis that are in there and be direct. Try to leave as little to interpretation as possible.

NECESSITY | This also often gets lost in email but be sure to exercise not only professionalism but also necessity.

Because let's be honest: Some things shouldn't be an email. For some things, you should have picked up the phone. For other messages, maybe we should've been mindful that the contents of an email had some sensitivity to it.

Maybe those could've been a phone call or video conference, too.

Some things just should not be ever put in print. And not necessarily because anything nefarious is happening, but rather out of an abundance of caution or consideration.

INSTANT MESSAGING

We do a lot of instant messaging in Slack. We find that an email works for things that can wait and instant messages are for simple, quick questions or clarity – like those times when you would have gotten up from your desk and walked to someone's office.

'I need an answer pretty quickly so I'm just going to walk around the corner.' That's instant messaging.

VIDEO CONFERENCING

At BELAY, as we've mentioned, we *highly* encourage video meetings.

Video conferencing is – as we already discussed – a requisite for us. And we conduct a vast majority of our meetings – both internal and external – using Zoom video conferencing, which has been awesome for us.

TEXT & PHONE

Our leadership team has a group text, for example – and some of our internal teams do the same. It's easy, quick communication because everyone has a phone.

But just as with instant messaging, it's important to establish policies around someone using their cell phone for sensitive information.

So regarding cybersecurity, you might need to determine how you want your team members to use their phones.

COURAGEOUS CONVERSATIONS

Oh, courageous conversations.

At BELAY, we firmly believe in their importance and impact, but don't get us wrong: They're not always easy. But they are *always* the right thing to do.

A courageous conversation is one with high stakes, is emotionally charged about issues that matter, and involves the perspectives of more than one person.

Courageous conversations are the essence of healthy conflict management – and are the most effective way to avoid conflict escalation. No workplace will be conflict-free, but it is possible to create a non-judgmental, emotionally intelligent environment that allows for hard conversations in a respectful way.

So when initiating courageous conversations virtually, visual contact proves even more important. Facial expressions provide a lot of visual cues about what people are feeling — even small, fleeting changes, called micro-expressions, provide useful information about people's initial reactions to information. And exchanging emails, texts, or phone calls means you're likely to miss momentary changes in people's facial expressions — and the meaning they convey.

It then proves paramount to use video conferencing to create an exchange wherein you can interact effectively and intimately.

RESOURCE

**Courageous Conversations:
Cheat Sheet**

Here's everything you need to know to make them work.

WHAT TO KNOW ABOUT COURAGEOUS CONVERSATIONS

- **They must come from a place of compassion.** No one will have a courageous conversation if they don't care about keeping that person around.

- **They require permission.** It is impossible to have a courageous conversation if the other person does not buy into it.

- **They require foresight.** Plan ahead but remember that the other person hasn't had time to prepare. Give them some space to steel their nerves and show up for you and the conversation.

- **They are not a one-time conversation.** Courageous conversations do not happen in a vacuum, and they require more than one meeting to guarantee changes.

WHAT TO DO BEFORE A COURAGEOUS CONVERSATION

- **Check Your Motives.** Under conditions of stress and threat, our motives may be dictated by whether others will like us, whether we'll look good, be right, win, or avoid conflict.

  Gut-check time. Ask yourself: What do I really want?

- **Evaluate Your Emotions.** Some feelings – like anger, fear, hurt and defensiveness – can be a barrier to a productive conversation.

  Gut-check time. Ask yourself: Have I acknowledged my role in this? Why would a reasonable, rational, and decent person do what he's doing?

- **Collect Your Facts.** Don't start the conversation by sharing your conclusion. Instead, share the facts and present your data.

  Gut-check time. Ask yourself: Did I build my case in a patient, honest, and vulnerable way? Am I prepared to let them challenge my case?

- **Be Curious.** With a blend of confidence and curiosity, you can listen deeply, and, in turn, others will be less likely to resist you to be heard.

  Gut-check time. Ask yourself: Are you prepared to humble yourself and genuinely listen?

HOW TO START A COURAGEOUS CONVERSATION

Remember that the success of any courageous conversation begins with yourself. No matter how well the conversation begins, you'll need to stay in charge of yourself, your purpose and your emotional energy.

Next, start the conversation with these steps:

- **Inquire.** Cultivate an attitude of discovery and curiosity. Watch body language and listen for unspoken energy as well.

   Gut-check time. Ask yourself: What do they really want? What are they seeing, saying, and not saying?

- **Acknowledge.** Demonstrate that you've heard and understood by paraphrasing what you've been told.

   Gut-check time. Ask yourself: What did I hear and understand as their perspective?

- **Advocate.** Once you sense that they've expressed themselves completely, it's your turn.

   Gut-check time. Ask yourself: What can you see from your perspective that you need to clarify your position without minimizing theirs?

WHAT TO DO DURING A COURAGEOUS CONVERSATION

Once you've initiated the conversation, having taken stock in what should come of a courageous conversation and you've done your homework as to how you should approach it, be prepared to offer four actionable items.

- **Action Item #1: What they should keep doing.**

   What's one thing that this person does that is helpful that they should continue doing?

- **Action Item #2: What they should start doing.**

   What's one thing that this person doesn't do that is helpful that they should start doing?

- **Action Item #3: What they should stop doing.**

   What's one thing that this person does that isn't helpful that they should stop doing?

- **Action Item #4: What they should do more.**

   What's one thing that this person does that is helpful that they should do more?

MANAGING EXPECTATIONS WITH EMPLOYEES

We think expectations – and communicating them in no uncertain terms – is mission-critical.

You have your KPIs (Key Performance Indicators), metrics, and goals for your team members. Those are relatively standard, regardless of whether you're brick-and-mortar or hybrid. It's very similar.

Setting expectations is your opportunity to let employees and teams know from the beginning exactly what your expectations are of them, their role, and the team. It is also your opportunity to explain the shared and measurable objectives in no uncertain terms to eliminate the temptation to micromanage.

Here's how.

AVAILABILITY.

Clearly communicate when you expect them to be 'online' by phone, text, email, chat, or otherwise. And when they are not available, explain that they need to communicate this in advance.

And that's going to depend on whether somebody is hourly or salary, and what their job function is. If, for example, you're in a call center, you might have specific shifts and so there might not be quite as much flexibility there.

Ask yourself …

- Do you want everyone to be at their desk by 8 a.m. and clock out at 5 p.m.?
- What does that system look like?
- Are you prepared?
- Do you have the technology to clock in and out?
- What does it mean if they want to take a longer lunch? Is that okay?
- Are you expecting them to eat at their workspace?

PRODUCTIVITY.

Explain the shared and measurable objectives in no uncertain terms to eliminate the temptation to micromanage.

And it goes back to those KPIs and metrics that we shared in the beginning.

Ask yourself …

- Is there a certain number of *insert specific metric or KPI here* that they need to work on?
- Do you expect a certain response time?

MEETINGS.

We believe – again, being remote – to always look to make a connection with somebody.

If there are mandatory meetings for which hybrid employees will be expected to attend, whether weekly, monthly or quarterly, explain these expectations in advance, as well as how you'll meet, i.e. Zoom, Skype, Google HangOut, etc.

Ask yourself …

- Is it going to be a web conference?
- Do you require that they keep their web camera on?
- Do you need to send out an agenda?

YOUR COMMUNICATION WRAP-UP

Communication – clear, explicit, and thoughtful communication – is, at least for us, the foundation for, well, everything when working remotely. Because regardless of industry, job, or even whether you work in a brick-and-mortar office or virtually, how we express our expectations and needs inevitably impacts and affects every outcome.

Those qualities that we consider to be inextricably human – sociability, empathy, compassion, kindness, patience, adaptability, and a willingness to learn – will be the key to the success of your partnership. Unlock those and the sky's the limit!

To recap how to communicate effectively with your hybrid team, be sure to …

- Be a better communicator to get things done, forge connections, and get through this thing called life.
- Know what to use — and when — to communicate, leveraging the style(s) each employee prefers to address each specific need or request.
- Have courageous conversations for the most effective way to avoid conflict escalation to create a non-judgmental, emotionally intelligent environment.
- Manage expectations to let employees and teams know from the beginning exactly what your expectations are of them, their role, and the team.

YOUR CULTURE

Ask 10 different leaders why they've chosen to do things the way they do and you'll get 10 different answers. And that's OK. Why? Because knowing your 'why' is a cornerstone to creating – and fostering – a company culture as a leader.

Because culture is something that is pre-existing in your company's genetic code; it's not something that employees bring with them. Instead, leaders seek out those individuals who they feel would be a good match with their existing vision for the company.

For a buzzword like 'culture,' it's often easier to say what culture isn't, rather than to try and define what it actually is – or at least should be. Culture is not Secret Santa gift exchanges, karaoke contests, Nerf gun fights, catered food-truck lunches, or even a zip-lining outward-bound excursion with your co-workers. While those things are awesome, it is a shared vision – not a shared space – that creates culture. It is about instilling a sense of belonging for your employees and ensuring they identify with the greater mission and values of the company, despite being a hybrid workforce.

Here, you'll learn the importance of creating your own brand of culture — and everything you need to do to maintain it.

> The three great elements to an organization's working environment are purpose, culture, and strategy.
>
> Culture is the linchpin that ties the other two together. If your culture isn't healthy, you can have the best strategy in the world and still have difficulty executing.
>
> That's because you're spending so much time on things like people dynamics – a disgruntled worker, infighting, someone who isn't clear on their job, etc.
>
> Focusing on culture before strategy allows you to be more proactive, rather than reactive, when dealing with your team.

JENNI CATRON
CEO AT THE 4SIGHT GROUP

WHAT IS (AND ISN'T) CULTURE?

We'd suspect that a lot of the confusion surrounding the idea of corporate culture stems from this fundamental difference.

Don't be misled by the shared terminology. In the business world, culture isn't about shared rituals, dress, or cuisine.

It is about the way your employees view and treat one another. It's about how interpersonal conflicts are handled. It's about how you celebrate successes, and how you overcome failures. It's about how (and how often) your team communicates. It's about how officers interact with junior employees. It's about a shared commitment to reaching shared goals in a way that everyone has agreed upon.

At BELAY, we make no bones about our spiritual beliefs.

The very first thing on our list of core values is "God" and we make clear that our faith in The Bible informs our sense of professional stewardship. With that being said, you don't have to be Christian, or even believe in God, to work with us. We believe that all people should be treated with dignity and respect, regardless of their beliefs.

The only thing we ask of our employees is that they share in that mutual respect. And that works as an excellent illustration of what is and isn't company culture — what defines our culture most is the shared respect, not the shared belief.

WHEN CULTURE GOES HYBRID

Across the many studies done on hybrid work, one challenge, in particular, has been consistent – hybrid employees feel more isolated, and less connected to their coworkers.

That's a major issue and one that could potentially undo some of the benefits that hybrid work brings.

The good news, however, is that it can be overcome. And one of the key ways to do so is by cultivating a strong hybrid work culture.

In business, hybrid work culture refers to the shared values, behaviors, and beliefs that unify a geographically diverse team, and guide them towards common goals.

It's an inspiring idea, but it isn't easy to implement. The literal, physical space separating hybrid team members can easily manifest as emotional and interpersonal distance as well.

Because of this, leaders of hybrid workforces must be even more committed to establishing and cultivating a robust culture. To do this, you must remain explicit, vocal, and intentional about your company's identity and culture.

That means you need to be your culture's best spokesperson.

The greatest spokespeople aren't just cheerleaders; they're also educators.

So that means that you must clearly define your hybrid work culture before you can effectively promote it. To bridge the geographical gaps on your hybrid team, you need to communicate your company's culture in both clear and inspiring ways.

Start by creating a "manifesto" – a document that defines your corporate identity, its values, and its guiding principles in the most definite terms possible.

But your involvement doesn't stop there. You also need to be your culture's best model citizen.

A leader can bang the drum of mission statements day and night, but unless they actually march to the beat, no one else will. The best way to cultivate your hybrid culture is to abide by and embody it every single day.

Lead by example, and if the culture is an effective one, it will catch on in no time. Provide feedback, express gratitude, get to know your team on a personal level, and make an effort to humanize yourself in the eyes of your employees.

When you do these things, your team will undoubtedly follow suit. Remember, most people want to feel that they are part of something greater than themselves. And they definitely want to feel connected to their coworkers. They don't need convincing of those things. They need an environment that nurtures and promotes them.

They need a hybrid work culture that allows personal connections to flourish, no matter the distance.

CREATING HYBRID CULTURE

In our 11 years as a remote company, we've proven that a shared vision – not shared spaces – creates a culture. It is about instilling a sense of belonging for your employees and ensuring they identify with the greater mission and values of the company, despite being a remote workforce.

And contrary to what others may – GASP! – still believe, we've proven, time and time again, that culture can be created without an office. And our awards and acknowledgments for culture are living proof of this.

We've won these major culture and business awards from prominent national magazines and outlets despite the fact that not a single one of our team members shares an office.

Why?

Because we understand how culture is really created. Because we instill our mission and values of gratitude, teamwork, vision, passion, fun, and God into every one of our 1,200 remote workforce team members.

So here are a few ways you can do just that, too.

KNOW YOUR WHY, MISSION, VISION & VALUES.

One of the most tactical things to do is to memorize the mission, vision and values.

But it's not just a short-term memory recitation. Weave your mission, vision and values into every corporate event and every team meeting, this way they become a common language for your team and provide the foundation and framework for everything you do. You want to be able to not only talk the talk but walk the walk, embodying and reinforcing each value so that in everything you do, you are your culture. Your people are your culture. And everything else falls perfectly into place.

Here are a few examples from our company.

REFUSING STATUS QUO

To lead a hybrid team, it takes confidence to lead the charge in disrupting the status quo and dismantling the 'way things have always been done.'

This allows your team to question "why" and look for constant areas of improvement.

It is this kind of 'outside-the-box' thinking that will keep you agile and ready to change to make your organization better.

GRATITUDE

If you really want to make a change with yourself, you must first start by being grateful for all of the things that you already have. Therefore, it becomes paramount for a hybrid leader to regularly show gratitude.

At BELAY, we have something we've lovingly named the 'frugal WOW' – and that has drastically impacted our culture for the better.

Our frugal WOWs are not gifts that commemorate milestones; rather, it's our way of showing gratitude to our employees to let them know that we see them, and the brilliant job they're doing.

From BBQ spices for someone who loves to cook to monogrammed guitar picks for someone who loves to play the guitar, gift cards, books, and handwritten notes, our frugal WOWs are a small gesture of gratitude that evokes a big 'warm-and-fuzzy' feeling for the very people who make literally everything possible at BELAY.

RESOURCES

Identify Your Why

How To Define Your Values

"

Remember that showing gratitude might not look the same from one team member to the next. One might appreciate a gift. Another might enjoy a free lunch. And for some, a simple "thank you" note will be enough.

Also, don't assume the way you see gratitude is the same way your team will. Take the time to interact and get to know each team member so you'll be better prepared to show them gratitude when the time comes.

For me, what gets scheduled gets done. In other words, be intentional about your gratitude. As busy as we are as leaders, it's easy to go through a day, a week and even a month without stopping and reflecting on how your team is performing and who is really getting things done. Use calendar reminders to set aside specific times regularly to show appreciation. Don't let your day-to-day busyness cause you to forget some of the daily awesomeness your team is doing.

And even if you're fully remote, you can still get together on occasion to celebrate what the company, and each other, is doing. Depending on your budget, get together quarterly, or at least annually, and throw a party! This isn't about work. It's about appreciation. Invite a guest speaker, give out gifts, provide amazing food, and just celebrate your team. Go over the top as much as your budget will allow. Christmas parties are a great opportunity to do this, but also try to get together during the year 'just because.'

TRICIA SCIORTINO
CEO OF BELAY

TRUST

As we discussed at great length earlier – but always ever repeating – trust is a small word, however, it has a major impact on any and every kind of relationship.

So what we encourage is, that from day one you choose to fill all gaps with trust, knowing that you and your team are there to serve one another.

We would even encourage you to fill the gap with trust even before you feel like someone has earned it.

Sounds crazy, right? But from day one, if you fill the gap with trust, the momentum will pick up exponentially within your relationships.

Secondly, we are all people. So what does that mean? It's not if, it's when. A mistake is going to happen or something is going to go wonky. So, when this happens, we would encourage you to again fill the gap with trust, really believe the best in that person, and lead with questions.

It's amazing that when you lead those types of conversations with questions, it eliminates the negative things that could fill that gap, like accusations. And when you ask questions, more often than not, you will uncover the true underlying issue.

With the underlying issue out in the open, you can now work through it and come out stronger on the other side, which includes stronger leadership abilities.

VULNERABILITY & TRANSPARENCY

When we onboard new hires at BELAY, we require them to read 'Getting Naked' by Patrick Lencioni.

In the book, Lencioni explains his theory regarding vulnerability and presents concrete steps for putting it to work in any organization.

The book explains that being vulnerable and transparent at work can be found in many opportunities as a leader. Getting over the fear of being embarrassed, for example, is an opportunity to give any and all ideas you have to solve a problem. Another is getting over feeling like you need to prove your title and importance and instead taking the opportunity to be a servant to your clients and your team.

The cultural impact? You and those you lead will be bound by a common denominator: You are all human and you are all there to serve each other as you work towards common goals.

HUMILITY

Let's talk about humility.

Why?

Because, much like vulnerability and transparency, humility further compounds the intrinsically human elements of your culture. And really, there is no culture without people, right?

Psychological research reveals that intellectual humility leads to a multitude of other positive – and some surprising – traits, including honesty, fairness, authenticity, openness to new ideas, and even the ability to make better decisions.

But as a great leader – a humble leader – you know that when you're inspired, those you lead are inspired. You know that if you serve, those you lead will serve, too. You know that if you lead with a humble heart, those you lead will be humble.

Time for an honest humility gut-check. Which of these do you believe to be true?

☐ I compliment or praise colleagues and employees without hesitation.

☐ I easily admit to my mistakes.

☐ I am willing to take on lower-level work for the good of the team.

☐ I gladly share credit for team accomplishments.

☐ I readily acknowledge my weaknesses.

☐ I offer and accept apologies graciously

☐ I lead to serve.

☐ I have reserves of inner strength.

☐ I seek input from others.

☐ I know myself.

☐ I am genuine.

☐ I invite trust.

☐ I treat others with respect.

☐ I understand my limitations.

☐ I lead by example.

☐ I acknowledge that I don't have it all together.

☐ I know the difference between confidence and pride.

☐ I live vulnerably.

☐ I believe in a culture of fairness and equality.

And as a follow up, for those you left blank, ask yourself why. What do you think you could do to embody that particular facet of humility?

"

Be transparent and willing to share the good, the bad, and the ugly with your whole team.

At BELAY's weekly staff meeting every Monday, I share different metrics and give a quick 10-minute 'State of BELAY' presentation.

Why? Because I want to treat your team like adults. You'll gain their respect and you'll never catch them off guard when there's a big announcement or something changes.
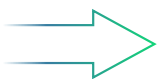
Give revenue updates, hiring news, contractor pool updates, and information about where there might be gaps.

This is also a great time to share positive news and 'rally the troops!'

Do all this so when you get to the end of the year, everyone will pretty much already know whether it's been a good year or not. There will be no surprises.

TRICIA SCIORTINO
CEO OF BELAY

ZERO-TOLERANCE GOSSIP POLICY

Employees are more likely to gossip when they don't feel trusted and/or when leaders don't create a clear enough vision for the business. They wonder, 'What am I even doing here?'

A lack of trust creates a negative environment, and negative environments breed gossip. Gossip can come in many forms but, specifically in this scenario, gossip means taking a problem to somebody who you know can do nothing about it.

When there is no trust, employees will end up gossiping because they feel as though there is no appropriate path to fix their problems.

At BELAY, we have paved a broad path for our employees to take their problems to the appropriate individual. We do not tolerate any sort of gossip because we know that gossip just breeds more gossip.

ORGANIZATION FOR A THRIVING CULTURE

Maybe 'organization' and 'culture' don't immediately connect for you. And that's understandable. But hear us out.

Just as making your bed every day gets you in the mindset of being organized, as a leader, being organized when it comes to your calendar, email, DropBox folders, chart of accounts, Basecamp projects, and more is much the same.

Organization is a must to succeed and sustain in a hybrid team – not to mention what peers, boss, board of directors, and others expect. If you *really* want to develop a meaningful hybrid culture in your organization, you must take organization seriously.

If you're a scattered leader in your office and your on-site assistant is paid to clean up after you and organize your notes, emails, and more, then a solid hybrid culture is likely not on your horizon.

When you're disorganized, it also shows your clients and staff how well they're likely to be cared for. And when you are disorganized, it communicates that systems, processes and work instructions are to be disrespected and not adhered to.

So, begin by looking in the mirror!

As a leader, the way you act and work gives your employees permission to act in the same way (good or bad). Real leaders understand you cannot expect from others what you are not willing to do yourself.

So, if you want a healthy hybrid culture, it must be consistently and completely organized. Getting organized is tough, especially if it's not something you are in the habit of doing.

So, here are seven things to do now to get you on your way to being a better hybrid leader or team member.

1. Get organized in your email inbox and folders.

2. Get organized with calendars (with colors) for both your work and personal life.

3. Get organized in meeting notes and templates.

4. Get organized in file share folders and naming.

5. Get organized in your chart of accounts.

6. Get organized in your projects.

7. Get organized with a list of things you need to organize.

We see it all the time at BELAY, talking with frustrated leaders who will admit they've hit the lid of their leadership capacity.

A consistent theme in their words is their lack of organization. If you desire to build a meaningful hybrid culture, you, as a leader, will need to take 100-percent ownership of your organization before you can expect it from others.

That will set the tone for the hybrid culture you want to establish.

> As we say at BELAY, we're not running an ER here. No one's life is at risk because of what we do. In the middle of a stressful day, be sure to keep everything in perspective. A fun and productive culture can exist at the same time.
>
> Sometimes, leaders can get a bad rap for being unapproachable and distant. And, sometimes, that perception is warranted.
>
> That's why it's important for our team to see us having fun, too. When we're in the middle of it all, or when we're the first one on the dance floor, we communicate that we're approachable and relatable. We're not the boss in the corner office who no one ever sees.
>
> And if you're not as comfortable stepping out, look around your team. Who are the outgoing extroverts? Recruit them to help you come up with some things that will help you build a fun, engaging work culture.
>
> This doesn't have to be expensive and extravagant. You can do small things to recognize your team and their effort. They will appreciate the time to unwind and likely become even more passionate about what they do in your company.

LISA ZEEVELD
CFO AT BELAY

HOW TO KEEP TEAM MORALE HIGH WHEN WORKING REMOTELY
TRICIA SCIORTINO

Listen. Let's start this off with some brutally transparent honesty, shall we?

These are *not* fun times. However …

It can also be argued that just as it's said that only bored people get bored – fellow parents, you surely *know* this adage all too well – it can also be argued that only unfun people can't find the fun in every experience.

This current forest? Not super fun. But the trees? Oh, the trees. There are some *really* fun trees in this dismal forest. You just have to *want* to find them.

And at BELAY, we *always* find them.

In fact, 'fun' is one of our core values. Not in a hollow 'Go team!' kind of way but in a live-it-breathe-it-embody-it kind of way.

Core Value: Fun

'We don't take ourselves too seriously. *Seriously.*'

And how do we create, nurture and foster that very core value to transform it from a two-dimensional statement to a vibrant lifestyle? Culture.

WALKING THE WALK

Our culture is *seriously* impressive. But before you go accusing me of being biased – because I plead guilty as charged, your Honor – we're not the only ones who think so when you consider how many awards that culture has earned us. See for yourself **here.**

We've won these major culture and business awards from prominent national magazines and outlets *despite* the fact that not a single one of our team members shares an office. Why? Because we understand how culture is *really* created. Because we instill our mission and values of gratitude, teamwork, vision, passion, fun, and God into every one of our 1,100-plus remote workforce team members.

We've proven that a shared vision – not shared spaces – creates a culture. It is about **instilling a sense of belonging** for your employees and ensuring they identify with the greater mission and values of the company, despite being a remote workforce.

And contrary to what others may – *GASP!* – still believe, we've proven, time and time again, that culture can be created without an office.

BELAY is living proof of this.

WHY FUN MATTERS

It's been said that people often remember stories with greater impact, ease and recall so I'm going to **lean into science** and tell you a quick fable about two woodcutters.

There were once two woodcutters who wanted to see who could cut the most wood in one day.

Both woodcutters started chopping away. After an hour, one woodcutter suddenly stopped. When the other woodcutter noticed, he smugly assumed that his opponent must've grown tired – and continued to cut down his trees even faster.

But soon, he heard his opponent cutting again. And then stop cutting once more. So he continued to cut, taking advantage of his opponent's 'breaks.'

For the rest of the day, the one woodcutter would stop chopping for fifteen minutes so when the competition ended, the other woodcutter, who had worked straight through without stopping, was confident he would win.

HOW TO KEEP TEAM MORALE HIGH WHEN WORKING REMOTELY
TRICIA SCIORTINO

But to his surprise, the woodcutter who had taken timely breaks won. But how?

Because while one woodcutter was still chopping down trees, the other was taking time to sharpen his ax.

Still with me? Good.

Because I'm about to pull back our curtain and let you in on some of our *fun*-damentals. See? Dads don't get to make all the jokes.

HOW WE SHARPEN OUR AXES AT BELAY

As we mentioned earlier, absolutely *nothing* – we're looking at *you*, COVID-19 – can stop us from finding our forest of fun. In fact, much of what we do in this current climate was established long before any of the headlines were even a seed of possibility.

Some of these fun initiatives include – but are not limited to …

FRUGAL WOWS

We regularly **show gratitude** in our company through something we've lovingly named the 'frugal WOW.'

Our frugal WOWs are not gifts that commemorate milestones; rather, it's our way of *showing* gratitude to our employees to let them know that we *see* them and the awesome job they're doing.

From BBQ spices for someone who loves to cook, to monogrammed guitar picks to someone who loves to play guitar, to gift cards, books, and handwritten notes, our frugal WOWs are a small gesture of gratitude that evokes a *big* warm-and-fuzzy for the very people who make *literally* everything possible at BELAY.

WELLNESS REIMBURSEMENT PROGRAM

We are *passionate* about the holistic wellness of our team. So our Wellness Reimbursement Program is yet another example of us walking-the-walk when it comes to touting work-life balance.

Our employees are our greatest asset. So in an effort to maintain our organizational health and embrace the continued importance of overall holistic wellness, we offer a wellness benefit, which is reimbursable quarterly.

Whether it's staying physically fit, keeping stress levels low with massages or investing in a class to learn something new, we've got our employees covered.

PAY IT FORWARD PROGRAM

Our Pay It Forward Program is a benevolence fund that is bolstered by contributions from our employees to help people through tough times. Our employees, clients and contractors can be recipients from the program.

Through our collective generosity, we have been fortunate to bless hundreds and look forward to many more.

But now, more than ever, we recognized the need for even more fun and gratitude. So we decided to up our own ante recently with …

SCAVENGER HUNTS

We started incorporating quick scavenger hunts on our company-wide weekly meetings. They get the blood pumping, the adrenaline rushing and provide unrivaled entertainment for those of us who get to watch our friends scramble to win – all on a video call.

HOW TO KEEP TEAM MORALE HIGH WHEN WORKING REMOTELY
TRICIA SCIORTINO

GRUBHUB

It's no surprise that food is awesome. It's like a hug from the inside and while we are all actively practicing social distancing, we wanted to find a way to show our team some love – all while maintaining 6-10 feet of safe distance, of course. So we surprised *everyone* with GrubHub gift cards. Food is love you can eat, y'all. #givefoodhugs

TIKTOKS

We recently had to move our in-person Spring One-Day conference to a virtual model – *WOMP WOMP* – so we needed to get creative to find a way to add yet another layer of fun and community.

Enter: TikTok

We challenged *everyone* to submit entries for our first-ever TikTok contest – with a $50 gift card up for grabs. We received 27 *seriously* unbelievable entries and ended the meeting with laughter belly aches. We may have voted for only one winner but really, we were *all* winners after seeing those videos.

ALL ROADS CAN LEAD TO FUN

Fun is out there, you guys. I'd even argue that a lot of it is low-hanging fruit in that fun forest we talked about. It's just there, waiting to be savored.

The headlines? They're rough. Our new reality? *Pretty* sobering. But at BELAY, we've been preparing for this – perhaps unwittingly – since our inception. There is no BELAY without culture, fun, camaraderie, and mood-altering morale – and no virus could ever diminish that.

As featured **here.**

ESSENTIAL PRACTICES FOR MAINTAINING HYBRID CULTURE

Unlike a physical environment, a cultural environment isn't something that you can see, taste, touch, or smell; it is the only environment that you can feel.

It's that feeling in the pit of your stomach when you dread going to work or the excitement you feel when you're actually eager to go to work.

For us – and this may seem contrived – even though we don't go to the office every day, we really, truly have fun working together.

Our vibrant culture is what makes having fun at work possible. It's inextricably linked to our vision and by design, our team willingly – and enthusiastically – embodies that. We leave no margin for 'kinda sorta' cultural commitments; you've got to be all in, contributing to the greater good. It's a hum. A verve. A vibe. An electricity.

TREAT PEOPLE LIKE ADULTS

Give your employees the expected results, not the tasks to get to the results.

ENCOURAGE CULTURE OWNERS

Make sure everyone in your company understands that they are a steward of the company's culture. They are not innocent bystanders.

BE AN ACTIVE PARTICIPANT

When you have surveys, make sure they are not anonymous. When we solicit feedback in our company, your full name has to be on it. Part of treating people like adults is expecting them to own their words.

BE ACCOUNTABLE

Create a "rules of engagement" example for your employees to follow. For example, in our company, this is listed in our Employee Handbook. Our rules of engagement are based on trust when there is a gap in expectation. We choose to fill this gap with trust, then verify.

ACCEPT FEEDBACK

When we get criticism as leaders and employees in our company, we are encouraged to sit back, listen to and absorb the words, breathe, and turn our hands palms up. This puts us in a posture to navigate the criticism without it becoming emotional.

SAY IT ONCE, TWICE.

The default is to over-communicate until we know we have broken the threshold of communication with our employees.

As mentioned earlier, at BELAY, we believe in over-communicating, embracing the 'virtual nod' to let people know we're 'on it,' especially since we rely so heavily on email and instant messaging.

As mentioned earlier, use 'email as the pillar, and instant messaging as the glue.'

Also, leverage video conferencing, company retreats or quarterly face-to-face events to further develop the human ties that bind. There are countless ways to let people know you see them, even if you can't actually see them.

ACCESSIBILITY

One of the quickest ways to lose the trust of a hybrid team is to give the impression that they're 'out of sight, out of mind.'

With the BELAY corporate team spread out all over the greater Atlanta area, and our contractors and clients all over the U.S., we stress the importance of being 'online' from 9 a.m. to 3 p.m.

Since we are founded on the principle of being flexible, team members can flex their hours if they are early risers or night owls, or have personal daytime appointments, but generally, if you need someone, you can get them.

We also have a corporate team PTO calendar and when team members have scheduled time off, it is this calendar that gives visibility across our various teams.

> "
> Working from home doesn't have to be a solo experience. Schedule a lunch or two per week with friends or your spouse. Take the dog for a walk and say hello to neighbors.
>
> And, occasionally, be sure to work outside the home, setting up shop at a coffee shop, community space, library, or somewhere you can get work done while being outside your four walls.

LISA ZEEVELD
CFO AT BELAY

SOCIABILITY

No office? No problem. We enjoy virtual happy hours, virtual coffee talks, Friday highs and lows shared on social media, and more. Basically, we'll slap 'virtual' in front of anything as an excuse to get together. Just because we don't have an office doesn't mean our team can't have meaningful activities and share rich connection points – and yes, here it is again – have fun!

Here are some fun, team-building activities to consider …

"MTV Cribs"

But make it the Hybrid Team Edition. Start an internal video series where team members can show off their homes and personality in quick, self-made videos à la MTV Cribs.

It's a fun, behind-the-scenes (and screens) look into the personal lives of colleagues. Get creative by giving bonus points, such as someone hitting up their StairMaster in stilettos! (We're looking at you, Mariah.)

Reply All

Now before you shudder, try to view this email enemy through a different lens.

Consider sending out an email to the group with an icebreaker question – and be sure to get creative.

Ask everyone to respond to the question via email and – GASP! – reply all so that everyone gets to know each other a bit more.

Create A Private Facebook Group

Think: Instagram-meets-cubicle.

It's really nothing more than a simple 'all-call' page for photos that requires very little effort and maintenance but boasts a big return in team building and culture.

Plus, who doesn't love photos of dogs, vacations, babies and memes?

Video In-Person Events

With hybrid teams, it's important to let people see the real-world impact of their work.

Videos – even crude, un-fussy videos – of in-person activities and events are a great way to keep the team connected to your company's mission and to remind them that what they do is seen and appreciated.

Live Virtual Coworking

Yes, virtual coworking is actually a thing, and it might help your team be more productive.

Create a HangOut video call that's open for anyone to join – every day or maybe one day a week – so anyone interested can set up their 'cubicle' next to yours.

Mixer Calls

Donut is a Slack extension that can pair everyone in your company up for 15-30 minute non-work, one-on-one calls – THINK: a veritable blind date for remote employees – to give them an opportunity to get to know people they normally wouldn't be working with daily.

Virtual Scavenger Hunt

This one is a favorite.

Scavenger hunts send virtual team members to accomplish fun and ridiculous tasks as created by you, or using a scavenger hunt platform such as GooseChase or Actionbound.

Then, share the stories, videos, and photos on your social media platforms and team communication channels.

Themed Video Calls

There is nothing that dictates that meetings have to be buttoned-up and unimaginative – so try picking a theme every once in a while to spice things up. With just a little creativity, a virtual theme party can shake things up with a costume and a virtual background – like a beachy luau, pajamas party, superhero, black-tie – anything. Just show up and show out!

This or That

This-or-that questions are a great way to get to know someone or a great way to just burn some time. And whether you are just asking the questions or making it a game, you can ask for more details if one of their answers surprises everyone.

Think of gently divisive topics – like dog or cat, coffee or tea, Coke or Pepsi, iOS or Android, cake or pie, money or free time – for quick-fire insight into each other.

Picture This

Ask everyone to share a picture of something that reveals something about their life – their pet, their favorite room in the house, their kids, their significant other, a favorite vacation, an award they received – the sky's the limit. In sharing a seemingly small glimpse into who they are, colleagues have a fun, surprising way to get to know one another.

Guess Who

Get every team member to send you a baby photo of themselves and add them to a document or survey. Send it to your team and ask participants to guess who is who within a time limit. Collect their answers and award a prize to the winner who guesses the most correctly.

Three Truths And A Lie

Host a video conference and ask each employee to share three truths and one lie about themselves. The objective is to make the lie so realistic and believable that it won't be easily guessed.

Teammates then need to guess the lie for each coworker and whoever guesses the most right wins – but really, everyone wins because it is a great way to get to know interesting facts about one another, especially things that aren't
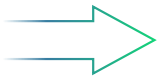
EVENTS

We believe that hybrid teams are extremely effective in accomplishing one's vision and living one's values.

But, we also understand that we have a 100% human workforce. And there's still no replacement for actual in-person contact.

So, we make a point to frequently bring our hybrid team together for in-person events. After years of doing this, we've found that there are five key benefits to in-person events.

People are social beings.

We want our team to enjoy the time they spend together, and a few times a year we host events where spouses and families are invited.

We've seen how this boosts morale and builds happy teams. Happy teams are strong teams.

Having fun connects people.

We've seen this – especially at our bi-annual company events – where we put a heavy emphasis on having a great time.

When you invest in fun, you show your team that they are valued, and that matters to them. Irresistible events yield employees who want to be there and *BONUS!* It helps with recruiting – because who wouldn't want to work for a company that likes to have fun?

Bringing the team together puts everyone on common ground.

When the executives get to share a bowling lane with their assistants, they get to know each other on a much different level.

This, in turn, builds trust and unity. Trust and unity are two ingredients you can't have too much of on a hybrid team.

Putting purpose behind internal events can benefit the organization overall.

Events don't have to be all fun and games.

When we have our entire team together, it's a great time to cross-train and update each department on the various other projects going on.

We mix up where people sit and encourage everyone to find someone they don't know to have lunch with because you never know where the next great idea will come from.

We believe internal events create loyalty.

Of course, we plan events that we all love to attend so it never feels like wasted time or money.

We've learned to leverage these events to build an irresistible culture and a solid team.

HYBRID CULTURE KRYPTONITE: THE TOXIC EMPLOYEE

There is no single greater threat to the success of your hybrid culture than toxic employees.

Toxic employees can be like the black mold growing behind your walls — they fester and flourish, often without you noticing until suddenly everyone around is sick and distressed and no one really knows why.

Toxic attitudes manifest themselves in a host of different behaviors, ranging from passive-aggressive comments and actions to downright rudeness.

These behaviors will sink not only your organization's culture and morale, but will eventually make their way to your bottom line in terms of lost productivity and the time and effort your managers have to exert in dealing with the destruction these toxic employees leave in their wake.

You know, deep down, that toxic employees are costing you. But you might not know how much.

These sobering statistics from the **Harvard Business Review** put a fine point on some of the damage a toxic employee in your midst can do to the rest of your team:

- 80 percent of employees lost work time worrying about the offending employees' rudeness
- 78 percent said their commitment to the organization declined in the face of toxic behavior
- 66 percent said their performance declined
- 63 percent lost work time in avoiding the offender
- 48 percent decreased their work effort

You, as the leader, are the only one who can do anything about toxic behavior in your workplace. And if you don't, you're showing your team that you are sanctioning incompetence.

When you let behavior like this slide, you're telling your team that this behavior is OK with you. You're also compromising your leadership by not acting, and showing your team that they can't trust you to confront this kind of behavior. And that will cost you even more.

If you've got toxic employees on your team, consider these **do's and don'ts:**

Do:

- Talk to the person to try to understand what's causing the behavior.
- Give concrete, specific feedback and offer the opportunity to change.
- Look for ways to minimize interactions between the toxic employee and the rest of your team.

Don't:

- Bring the situation up with your other team members. Allow them to mention it first and then provide suggestions.
- Try to fire the person unless you've documented the behavior, its impact, and your response.
- Get so wrapped up in handling the issue that you ignore more important work and responsibilities.

Take action to defend your team and your culture, and protect your bottom line.

YOUR CULTURE WRAP-UP

Driving a strong company culture without sharing a physical space requires authenticity, support, and engagement to elevate your culture beyond the physical – and lays the foundation for your company to thrive, regardless of zip or area code.

But to achieve that, there's a lot of intentionality that goes into how you create an environment and an organization that feels cohesive, connected, and engaged when you're actually not all in the same building together.

To recap how to create and maintain culture with your hybrid team, be sure to …

- Communicate — even over-communicate — using multiple channels to share celebrations, wins, and stories to connect people back to your mission, your vision, and your values.

- Be accessible by clearly communicating when you expect your team to be 'online' by phone, text, email, chat or otherwise.

- Be virtually social with virtual happy hours, virtual coffee talks, Friday highs-and-lows shared on social media, and more to share rich connection points and have fun.

- Honor work-life balance so your employees work to live, not the other way around.

- Trust your hybrid team to give your employees the freedom to leverage their particular strengths.

CHAPTER 11:

CONCLUSION

When it comes to the hybrid workforce revolution, if you're not leading the pack, you may very quickly be left in the dust. Because at the rate technology and trends advance, if you're not riding the wave at its crest, you'll be crashing down with it as the next wave forms.

So while a sustainable, long-term hybrid workforce will require significant pivots in leadership mindset, practices and communication methods, it is arguably what could ultimately save countless organizations' workforces.

In just a few short years, we evolved from 'Can we make this happen?' to 'It's happening. Can we make it sustainable?'

And we'll state this simply: You can.

When looking at other fully distributed companies, organizations can take plays directly from their books to inform nearly every single decision they make as they evolve what was once a temporary migration to an indefinite or even permanent arrangement.

In fact, we'd go so far as to say that hybrid work could save the global economy. A big assertion, we're aware. But hear us out.

If you consider that, on average, hybrid work is very often cheaper for employers – reportedly $11,000 cheaper – when instituted on just a part-time basis, you'd be hard-pressed to find a single capitalist business model that would turn its nose at healthier margins.

Let's also consider the importance of job security. Hybrid work has proven itself to be the lynchpin for how countless organizations could ensure continued productivity – while keeping employees employed.

And that job security? That job security makes people happy. And when people are happy, they're more engaged. And when they're more engaged, they're more productive.

And that increase in productivity? That adds even more heft to those healthy margins we just mentioned.

Wash, rinse, and repeat.

Organizations don't need four walls, a water cooler, ping pong tables, and a break room to be thriving, values-driven organizations with dynamic company cultures.

What they do need?

For hybrid leadership to be successful, one crucial factor is non-negotiable: No amount of technology or autonomy can replace the impact of having an effective, emotionally intelligent leader.

Our shocking-but-true assertion about hybrid workforces? Productivity does not have to wane. Culture does not have to suffer. Employee engagement does not have to dwindle.

In fact, they can all thrive, and you can have fun, too! Successful hybrid workforces are possible – and it starts with you!

RESOURCES APPENDIX

∞ BELAY

How to Start Your Remote Relationship Right: A Checklist

When it comes to getting off on the right foot with your remote employees, it's mission-critical to be clear when communicating expectations from the onset. In no uncertain or grey terms, explain exactly what your expectations are of your employee and their role.

So here are 12 tips to start your remote relationships *right*.

SET EXPECTATIONS.

Be sure to let employees and teams know from the beginning exactly what your expectations are of them, their role, and the team.

SELF CHECK

- ✓ Do you define the measurable objectives, goals, and deadlines specifically to eliminate the temptation to micromanage?
- ✓ Do you describe how those items will be tracked and measured to help your remote team know they are on track for success?

DEFINE EXPECTATIONS.

Clearly communicate when you expect remote team members to be available by phone, text, email, chat or otherwise. And when they are not available, explain that they need to communicate this in advance and define to whom.

SELF CHECK

- ✓ Do you lead by example, choosing to use an 'available or unavailable' signal, as found in many email programs to communicate your availability?
- ✓ Have you established virtual 'open office' times?

PLAN MEETINGS.

If there are mandatory meetings for which the remote team will be expected to attend onsite, whether weekly, monthly or quarterly, explain these expectations in advance, and send calendar invites as soon as the dates are determined to get – and keep – everyone on the same page.

SELF CHECK

✓ Do you host weekly one-on-one calls to proactively discuss delegated projects, questions, or concerns?

✓ Do you host bi-weekly or monthly calls with everyone on your virtual team to update each initiative's status?

COMMUNICATION IS MISSION CRITICAL.

Written communication comes with subtle nuances that can create major communication failures.

SELF CHECK

✓ Are you careful to overcommunicate?

✓ Do you leverage phone calls to stay in touch and nurture relationships?

CULTURE STILL MATTERS.

Unlike a physical environment, a cultural environment isn't something that you can see, taste, touch, or smell; culture is the only environment that you can feel – and it's just as valuable to a virtual workforce as it is to any other.

SELF CHECK

✓ Do you foster, nurture and promote culture like you would if the whole team were on-site?

✓ Do you look for ways to make your virtual team feel seen, like sending a little gift card to recognize hard work or an accomplishment?

LEAD WITH TRUST.

To lead a remote team effectively, you must trust your team to do that for which they were hired. Remember to focus on what each individual is doing and the goals and objectives you've defined for them. And ask yourself how they may feel about accomplishing the goals you've set for them, and then respond and manage accordingly.

SELF CHECK

✓ Do you recognize that each person on your team plays an invaluable role in the completion of projects, tasks and initiatives?

ASK QUESTIONS, AND LISTEN.

Without in-person contact and its inherent physical cues, you miss important clues. Listening is at the core of emotional intelligence, and great listeners also ask questions. Actively asking questions not only helps you better understand your virtual employees, but makes them feel more valued, too.

SELF CHECK

✓ Do you take the time to address any questions to get – and keep –everyone on the same page?

USE TECHNOLOGY TO CONNECT.

Inarguably, technology has changed the way virtual employees – all of us, really – work and interact on a day-to-day basis. So when you can't walk over to someone's cubicle, take advantage of Zoom, Facetime, Google Hangouts and more to connect with virtual team members.

SELF CHECK

✓ Do you use calls, texts, IMs or voicemails for casual conversations?

✓ Do you emphasize deadlines or celebrate accomplishments leveraging virtual collaboration tools?

BE PREPARED AND SPECIFIC.

You can't teach – or effectively delegate – something you don't know and understand yourself. Take the time to get prepared before giving instructions or expectations to a remote team. It will save your team from muddling their way through something without a clear understanding in order to save face. Provide any necessary training to set everyone up for success.

SELF CHECK

✓ Are you willing to teach – and learn?

✓ Are you prepared to invest time to proper onboarding and training?

USE COLLABORATION TOOLS.

A recent survey found that 38 percent of respondents named communication as their key issue when working on a virtual team. Collaboration tools such as Slack allow for team communication to be simpler to manage than traditional email, phone calls or text.

SELF CHECK

✓ Do you document everything – maybe in a collaborative project management platform like Trello or Basecamp – to create a chain of communication that everyone can reference?

✓ Do you upload emails, documents, images and other files so everyone can access them as needed?

BE INCLUSIVE.

When there are important decisions to make or tasks to complete for a particular project or initiative, be sure to include all involved parties on emails and in meetings. This will serve to not only let everyone know what has been completed and by whom, but will also help remote employees stay aware of the status of each project as it's handed off.

SELF CHECK

✓ Do you include all interested or involved parties on communications when there are important decisions to make or tasks to complete for a particular project or initiative?

NOW...LET GO.

This last step is essential, but also the most challenging. From this point on, it's imperative to have faith in your leadership, delegation process and people. And while it may be hard to let someone else take the reins, you're primed to delegate effectively and successfully.

When you manage a remote team, you can't just aimlessly wander over to someone's desk and breathe down their neck. (Which, really, you probably shouldn't regardless but that's another topic altogether.) Take that leap of faith – faith in your ability to hire world-class employees and faith in those rockstar employees to do exactly what you entrusted to them in the first place. Your organization, your sanity, and your bottom line will thank you.

Evaluating Trust Worksheet

Think about this question: Who am I struggling to trust and why?

Building trust can be tricky; it's not easy to do. Maybe you're unaware of an area or person that you are stuggling to trust. But once you are aware and can address it, you'll be on your way to building a foundation of trust.

Use this worksheet for the next week or so and document where you have questioned trust with your team. Ask yourself why and determine how can you work toward giving it in the future.

SITUATION WHERE YOU QUESTIONED TRUST AND WITH WHOM	WHY	HOW TO OVERCOME THE LACK OF TRUST

∞ BELAY

How to Build Trust: A Checklist

You can tell someone you trust them but if you're not putting your money – and their paycheck – where your mouth is, it amounts to nothing more than lip service. You can tell your teenage child that you trust them to drive your car but if you never hand over the keys, your actions paint a different picture.

At work and in life, trust is a currency. And just like a currency, it can be earned and saved over time – and depleted in seconds. Here are the seven critical elements to building trust.

Ask yourself: Do you demonstrate …

○ **TRANSPARENCY**

Vulnerability and transparency at work can be found in many opportunities. Getting over the fear of being embarrassed, for example, is an opportunity to give any and all ideas you have to solve a problem. Another is getting over feeling like you need to prove your title and importance, instead taking the opportunity to be a servant to your clients and your team.

If you as a leader, for example, are told you and your team must achieve a specific bottom-line performance this year and if you don't, you'll need to cut staff, communicate that to your team. While it can be daunting to express something that may concern people, openly sharing your goals – and concerns – with your team demonstrates transparency and trust.

○ **RESPECT**

Respect is as simple as the Golden Rule: Treat others as you'd like to be treated.

It's recognizing that everyone has rights, opinions, wishes, experience, and competence. It's also recognizing that despite our concerns and insecurities, you all likely share a common goal: wanting to do your job successfully.

So lead by example. If you say your meeting is at 10 a.m., don't be late. If you say you want honest feedback, don't punish those who trust you with an opinion you may not share.

○ UNITY

Pave a broad and clear path for your employees to take their problems to the appropriate individuals – namely up to you and other leaders, rather than sideways or down in the form of gossip – so your remote team has confidence their voices will be heard.

Without that path paved, however, employees will gossip because they feel as though there is no appropriate path to fix their problems, instead choosing to take their problems to someone they know can do nothing about them.

As such, encouraging communication that brings issues and challenges to you demonstrates professionalism that has the power to lift people up – and not tear them down.

Open, honest and direct lines of communication — with no tolerance for gossip — reaffirms your commitment to your team. It says, 'I believe in you. I see you. I trust you.'

○ CLEAR VISION

Ask your team to memorize your mission, vision and values – but it won't be just short-term memory recitation.

Be sure to weave your mission, vision and values into every corporate event and every team meeting so they become a shared language for your team and provide the foundation and framework for everything you do.

You want everyone to be able to not only talk the talk, but walk the walk, embodying and reinforcing each value so that in everything you do, you are your culture. Your people are your culture. And everything else will fall perfectly into place.

OPEN COMMUNICATION

Your team members are the only ones who can tell you where you hit the mark and where you fall short – so ask them. Then – and this is critical – listen.

Their insights will be invaluable in helping you decide to stay – or correct – course. Consider implementing company-wide surveys to gauge the health of your culture anonymously.

Then, address any issues where you've missed the mark properly. Treat your team like the adults they are and, in turn, you can expect them to do the same when asked to give feedback in their own words – even when it's not easy. Accepting and adapting to feedback from your boots-on-the-ground is the difference between talking-the-company-culture-talk and walking it.

FILLING GAPS

Trust is a small word, but it has a major impact on any kind of relationship. And for culture, it is quite literally the tie that binds.

So what we encourage is that from day one, you just choose to fill all gaps with trust, knowing that you and your team are there to serve one another.

We would even encourage you to fill the gap with trust even before you feel like someone has earned it. Because mistakes will happen.

So the best thing you can do for your team is to give grace. Choose to not only assume the best of their intentions despite their mistakes but also try to identify where and how they missed the mark – and make it an opportunity for growth and improvement.

○ HUMILITY

Much like vulnerability and transparency, humility further compounds the intrinsically human elements of your culture. And really, there is no culture without people, right?

Psychological research reveals that intellectual humility actually leads to a multitude of other positive – and some surprising – traits, including honesty, fairness, authenticity, openness to new ideas, and even the ability to make better decisions.

And when you're inspired, those you lead are inspired. You know that if you serve, those you lead will serve, too. You know that if you lead with a humble heart, those you lead will be humble.

Your Turn

1. WHICH OF THESE ELEMENTS CAN YOU IMPROVE ON OR DO YOU STRUGGLE MOST WITH?

_____

_____

_____

_____

2. WHAT STEPS ARE YOU GOING TO TAKE TO IMPROVE IN THIS AREA?

_____

_____

_____

_____

NOTES

_____

_____

_____

_____

_____

_____

How to Maintain Trust: A Checklist

Trust is a fundamental, foundational building block in any relationship – both professionally and personally. Your team was hired for a reason, right? So communicate expectations, give feedback and then – this is the tricky part – give them the freedom to leverage their particular strengths.

So, now that you've learned to build trust, you'll need to learn to maintain it. Here's how:

○ COMMUNICATE EXPECTATIONS

Be sure you're clear from the onset exactly what expectations are of your people and their roles, specifically when it comes to availability, productivity, and meetings.

○ GET FEEDBACK

Your team members are the only ones who can tell you where you hit the mark and where you fall short – so ask them. Then – and this is critical – listen.

Some leading questions can include:

1. Is there anything I can be doing better?
2. Do you have everything you need in order to be successful?
3. Do you have everything you need to do this task?
4. Is there anything else I can get or do for you?

DON'T MULTITASK

Seriously. Somewhere along the way, 'multitasking' was exalted on high, right smack dab next to 'busyness.' And while we've been led to believe that multitasking is the holy grail for effective time management, it's decidedly not. Pick one task, and stick with it – and nothing else – to completion.

DON'T MICROMANAGE

Are your team members self-disciplined and self-motivated? Can they do their job without the fear of you catching them scrolling social media? Because while they can – and will – be tempted to throw a load of laundry in the wash, you'll still need to trust that they will do the job for which they were hired — without your micromanagement.

CONTINUE TO FILL GAPS WITH TRUST

While this was mentioned for building trust, it needs to be leveraged for the duration of your working relationship in order to maintain trust. So when – not if – a mistake happens, you again fill the gap with trust and really believe the best in that person.

BE HUMAN

On the other side of that screen is a person – a person who, incidentally, has chosen to partner with you to help your organization thrive. So those qualities that we consider to be inextricably human – sociability, empathy, compassion, kindness, patience, adaptability and a willingness to learn – are critical to the success of your partnership.

Also, remember that each of your employees has a life outside of work, so demonstrate that you're invested in them as a whole person — not just as an employee. Encourage team banter and listen to what's going on in their lives – a new pet, an upcoming vacation or their new garden – and follow-up with them about it.

Such small gestures go a long way to nurture a meaningful relationship by showing you care.

SELF-CHECK TIME: ASK YOURSELF...

1. Where can you improve?

2. Where and when do you struggle the most?

3. What steps are you taking to improve?

BELAY

Giving Feedback Worksheet

"WE ALL NEED PEOPLE WHO WILL GIVE US FEEDBACK. THAT'S HOW WE IMPROVE." BILL GATES

Feedback is an essential part of helping your employees grow. It gives you the time and space as a leader to provide a response to someone's performance.

Use this worksheet as a tool to think through your feedback before you have a meeting with the individual. Get organized and collect your thoughts so that you can articulate your feedback in a way that is constructive to the person to whom you are giving it.

NAME	JOB/PROJECT	FEEDBACK

BELAY

1:1 Agenda Template

1. CELEBRATE

What's working really well right now? Where are you winning?

2. ROADBLOCKS

What's not working well? What do we need to change for next time?

3. DISCUSS

What can I help you with? What should we consider next?

4. NEXT STEPS

What do we need to do in the next week or two?

5. FEEDBACK

Is there anything I should be doing for you that I am not doing? Anything I should be doing better or more often?

6. PROFESSIONAL/PERSONAL DEVELOPMENT

7. ANYTHING ELSE?

Criteria For Picking The Best Meeting Cadence

IMPORTANCE →

Not Urgent Important!
STRATEGIC & PLANNED WORK

Weekly meetings if "in the business"

Monthly or Quarterly meetings "on the business"

Urgent! Important!
CRISIS OR BIG PUSH

Daily meetings until urgency decreases.

Not Urgent Not Important
ADMINISTRATIVE & DISTRACTIONS

Use email.
Do not meet.

Urgent! Not Important
INTERRUPTIONS

Ad-hoc meeting if needed.

URGENCY →

BELAY
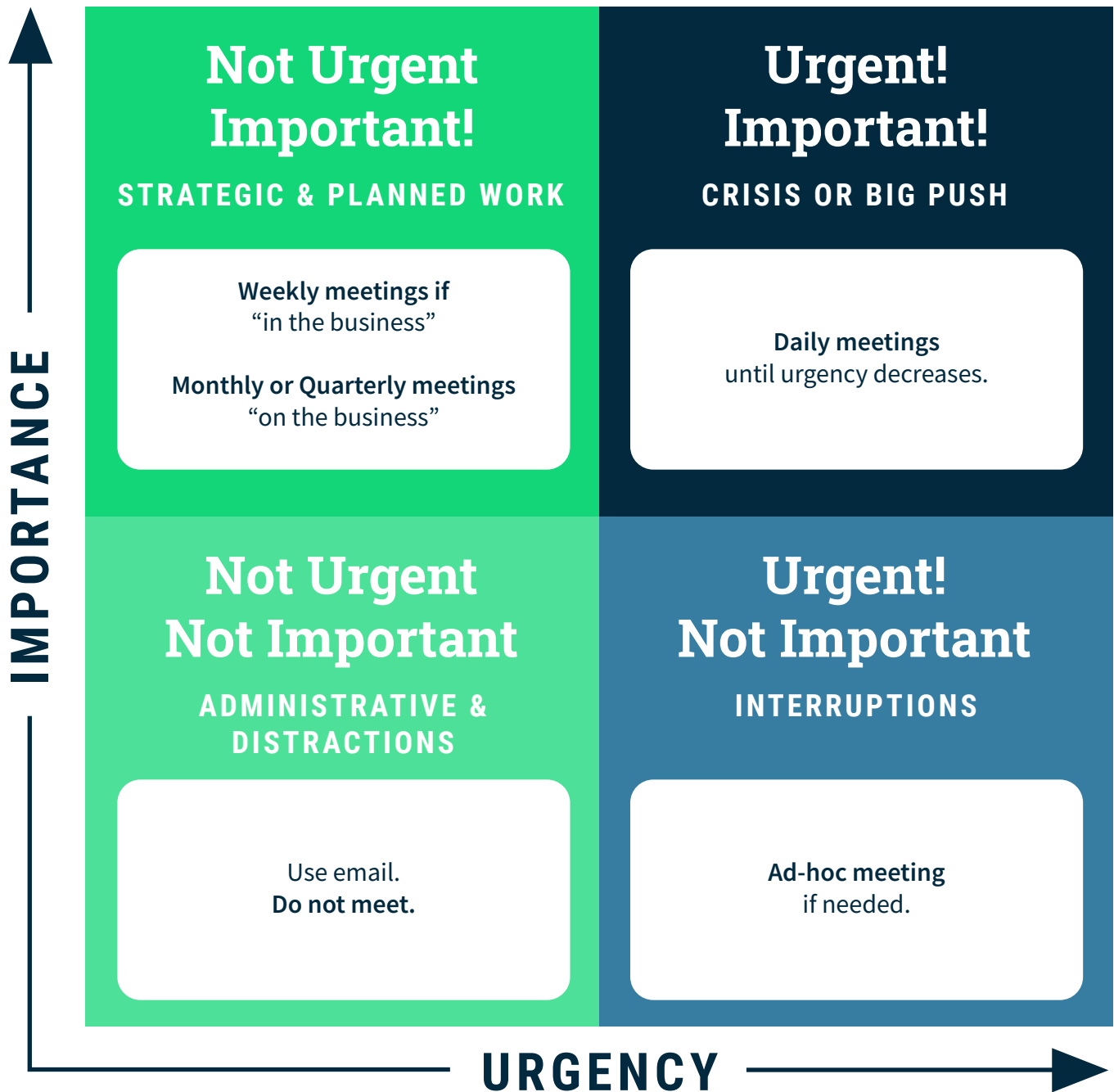
Recommended Meeting Cadences for Different Teams

GROUP/MEETING TYPE	DAILY: 10 - 20 MIN	WEEKLY: 45 - 90 MIN	BI-WEEKLY: 30 - 60 MIN	MONTHLY: 2 - 3 HRS	QUARTERLY: .5 - 1 DAY	ANNUALLY 1 - 2 DAYS
One-on-Ones		YES	MAYBE	MAYBE		
Department Staff Meetings	MAYBE	YES		MAYBE		
Project Teams	MAYBE	MAYBE	MAYBE	MAYBE		
Agile Teams	YES	MAYBE	MAYBE			
Leadership Teams	MAYBE	YES		MAYBE	YES	YES
Customer Success/ Account Management			MAYBE		YES	
All-Hands		MAYBE			YES	
Boards				MAYBE	YES	YES
Committees		MAYBE		MAYBE	YES	

Time-Tracker

TIME	TASK	DURATION
6 a.m.		
6:30 a.m.		
7 a.m.		
7:30 a.m.		
8 a.m.		
8:30 a.m.		
9 a.m.		
9:30 a.m.		
10 a.m.		
10:30 a.m.		
11 a.m.		
11:30 a.m.		
12 p.m.		
12:30 p.m.		
1 p.m.		
1:30 p.m.		
2 p.m.		
2:30 p.m.		
3 p.m.		
3:30 p.m.		
4 p.m.		
4:30 p.m.		
5 p.m.		
5:30 p.m.		
6 p.m.		

BELAY

Minimize Distractions & Time Wasters

WHERE DO YOU SPEND THE MOST TIME?

_____

_____

_____

_____

_____

SOLUTION

_____

_____

_____

_____

WHAT TASKS TAKE YOU AWAY FROM MORE IMPORTANT THINGS?

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SOLUTION

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WHAT DISTRACTIONS TAKE YOU AWAY FROM MORE IMPORTANT THINGS?

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SOLUTION

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How To Say No Nicely "Mad Libs"

IN-PERSON COFFEE/ LUNCH/DINNER

Thank you for thinking of me – that sounds like it would be a lot of fun! Unfortunately, this is a really busy season and I won't be able to at the moment. Can we look for another time that would work better for both of our schedules?

While I could think of few things better than a coffee date, I'm sad to say it will be four months before I could get it scheduled.

What a fun idea to meet for dinner after the meeting! I wish I could join you, but I can't as I have another commitment that evening. Have fun, and hopefully I'll be able to make it next time!

As much as I'd love to, I'm just not sure I'll be able to sneak away in this busy season. But thank for thinking of me!

I'm grateful you'd think of me but as much as I'd love the face time, but it might be hard in this season with current commitments.

Thanks so much for the invitation to your [party/event]. I'm so happy for you and hope you have a great celebration. Unfortunately, I can't make it but please know that I'll be with you in spirit.

(PERSONAL) I'd really like to go, but I can't make it. I've been so busy lately, and have planned some time with the family that evening. Have fun, and please let me know if you do it again! I'd love to join next time!

INVITATION FOR A MEETING/EVENT WITH AN EXTERNAL VENDOR OR CONTACT

Thank you for reaching out to let me know about [product/service]. We currently [are very happy with our provider/don't have a need for product/service], but I'll absolutely reach out if our needs change in the future.

Congratulations on becoming a rep for [multi-level marketing company]. I hear good things about the products. In fact, I think this is my third invitation this month! I appreciate the invitation to the party and hope you have a great turnout. I won't be able to make it but wish you nothing but the best.

It's so nice to hear from you – your organization has a lot to offer. At this time, I don't have any room in my schedule to entertain your services but wish you the best.

It's great to hear from you. I truly appreciate the offer but unfortunately, I won't be able to attend the [meeting/party/event]. I hope it's a big success.

Thank you for [asking/emailing]. I would love to [thing]. I understand we [have common goals/have similar cultures/could be a potential client/could be a potential sponsor]. But right now, it would be better to [meet with [other person]/ find out more if you have some information you can send] -OR- However, we have [a similar product we use/are happy with]. Thank you very much for [thinking of me/thinking of BELAY].

INVITATION FOR A MEETING WITH AN INTERNAL TEAM MEMBER

Thanks for the meeting invite. I appreciate being asked to join this discussion but unfortunately, I'm not going to be able to participate this time. Please reach out to [my assistant] for any additional information you may need. S/he will be happy to help or possibly direct you to someone else on the team who may be of assistance. Thanks again, and best of luck with your project!

Hey! Thanks for the meeting invite. I wish I could attend, but I just can't make it work with my schedule. You're welcome to reach out to [my assistant] to see if s/he can provide any information you may need for your project. I'm excited to hear how this all plays out. I know you're up to great things – thanks!

INVITATION TO JOIN A GROUP TEAM MEETING

Thanks for the invitation! It sounds like you have the best and brightest BELAY leaders on the call. I trust them to make the right decision.

Although I want to know what is going on with this project, I don't think I need to be involved in this particular meeting. I trust that you all can [meet on this topic/make these decisions] without me. Could you please update me after you meet and I'll let you know if I have any questions?

INVITATION OR REQUEST THAT COULD BE HANDLED BY ANOTHER PERSON

Thanks for reaching out about this! I have looped in [other person] and I know they'll be able to help you resolve this. [Other person] – please take a look at the below request. Is this something you can work through with [requestor]? Please let me know if there's anything further I can do to help resolve this.

That sounds amazing, but have you thought about speaking with [other person]?

I can't help you with that right now, but [other person] can.

I would love to help you but can't at the moment. I'd be happy to connect you with [other person] who might be able to assist you.

I'm not available for this [thing], but [other person] might be a better fit.

Thanks for reaching out! I'm sorry to hear you are having [that issue]. [Other person] has dealt with this exact situation fairly recently, so I'd reach out to her for advice. Let me know how it all works out.

Thanks for thinking of me but I don't think I'm the best person to contribute to the meeting. I'd suggest you reach out to [other person] to help. S/he is simply amazing at this type of troubleshooting.

I can't do it, but [other person] might be interested in this [thing].

I'd love to meet, but I really want [other team member] to own this project and will have him/her update me.

I'd love to meet with you as it sounds like you have some great ideas. I think it'd be great if you chatted with [other team member]. I'll have my assistant make an introduction.

Thanks so much for the invite! I don't currently have the bandwidth to meet but let me connect you to [other person], who I think would be a great resource for you.

I'd really like to meet but I think you would benefit more from getting in touch with [other person].

I'd love to meet with you, but [other person] is much closer to that area of the business. I'd be happy to connect you.

Thank you for the invite! I'd love to but with current work and personal commitments, I don't think I'll be able to make it. Let me connect you with [other person] as I think they could help with your [question/issue/project].

Thank you for reaching out – I appreciate you wanting to include me in this discussion. It sounds like you have the start to a great idea and I think [other person] would actually be the best person for you to talk to at this stage. Thanks again, and I can't wait to hear what you create!

Thank you for this invitation! I'm not available to meet at this time, but would be happy to direct you to my colleague, [other person], who could help you get started.

I love this idea and would love to join in on the collaboration. I think this is going to bring a lot of value to the team by [benefit]. However, at this time I'm trying to focus on some specific initiatives with some of my team members, so I'm going to humbly decline joining this one. I'd strongly recommend [other person] to join the conversation though – they've already been showing interest here as well!

INVITATION FOR A MEETING FOR A PROBLEM THAT COULD BE SOLVED VIA EMAIL OR LOOM

Hey, [Name]! I'd love to meet with you! However, I know it's important that we move the ball quickly. My calendar is pretty full. How about we see how much we can solve via email or Loom?

I'd love to meet with you about this but before we set up a time, can we both brainstorm quickly via email and see if we can come to a resolution? If not, I will be happy to schedule a meeting, but think we can both could put some time back in our day by resolving this without a call.

Thank you so much for the invitation. Unfortunately, my time for in-person meetings is limited. How about we Zoom instead?

Can this be covered on our next 1:1?

Can you please send me [the details to review/your recommended solution] prior to our next call?

SAYING NO "FOR NOW"

Thank you for reaching out – I would love to be a part of this discussion! I'm unavailable to meet at that time but could talk [alternate date/time] instead. If that works, please send an invite. I appreciate you including me and if you have additional background information I could look into prior to our meeting, please send it my way. Thanks!

Thank you for asking to meet as I'm grateful to be included in this project. You've got a great start here and I think I could better serve you if I have additional time to prepare. Would you be free at [alternate date/time] instead? If that works, please send an invite and again, thanks for the invitation!

I'm honored you thought of me and invited me to your event. At this time, I don't have any availability on my calendar this quarter. If you have another event later this year, please work with my assistant to get it on my calendar.

Thank you for your email – it's great hearing from you. At this time, I'm not available to meet with you but it's possible we can meet next month. Please work with my assistant to get that scheduled.

JUST SAYING NO IN GENERAL

I wish that I could, but that's not something I'll be able to take on right now.

Thanks for thinking of me, but I won't be able to commit to [thing].

I'd love to do that but in this season, I'm just not able to.

Thank you so much for asking/including me, but I just don't have the bandwidth right now.

I'd love to help but I'm already committed to [thing]. Best of luck!

Thank you so much for including me. Unfortunately, I won't be able to participate in the meeting. Again, thanks for thinking of me.

Thank you so much for the invite. I'd love to but with the number of commitments this season, it would be hard for me to schedule. But thank you!

This sounds like an incredible opportunity. Unfortunately, I won't be able to participate but wish you the best in completing the project.

I'd love to, however, due to commitments already scheduled, I'm going to have to decline.

No, thank you.

Hey [Name],

First, thank you for your email. I'm honored that you think of me in this way and I want to express my immense gratitude.

This is a really busy season for me personally. At the beginning of [year], I vowed to focus my time and energy on [priorities 1, 2, 3]. The piece of wisdom that led me to this important decision in my life went something like this: If everything is a priority, then nothing is a priority. It was a needed shift and the benefits have proven to be invaluable.

That said, I have to decline the invitation but appreciate your understanding. I wish you nothing but the best moving forward!

Gratefully,
[Your Name]

Delegation Worksheet

Many leaders actually lose money because they don't delegate.

If you could delegate just a few tasks like email management, appointment scheduling, travel bookings, meeting planning, and expense reporting, you could save yourself 15 hours every week.

Fill in this delegation worksheet below to find out what you can delegate today!

	YOU	OTHERS
LOVE	**1. KEEP** List all of the things you love doing. These are the things that make you feel alive. They don't leave you drained but fired up. Think of these tasks as things that only you can do for your business. Sure, you may love picking out your favorite pens at the office supply store but if you can ask someone else to do the task, it doesn't belong on this list.	**2. DELEGATE** List all of the things that you also enjoy doing (like buying those fancy pens), but that someone else can do for you. Maybe it's monthly expense reporting or booking travel. Another way to think of this list would be from the perspective of what you should lead, teach, coach, and develop others on your team to do.
HATE	**3. DELEGATE** List all of the things you really don't like doing on a daily, monthly, or yearly basis. These could be tasks that you should be doing but procrastinate completing.	**4. DELEGATE** List all of the things you really don't like doing and know someone else can do for you. Be creative – add things to this list like going to the grocery store or updating content on your website. Doing anything in this quadrant is guaranteed time wasted.

	YOU	**OTHERS**
LOVE	1. KEEP	2. DELEGATE
HATE	3. DELEGATE	4. DELEGATE

How To Know Who Is Ready To Take On More

The heart of effective delegation is solid decision-making. Managers must be able to assess their team and determine how to best effect results.

> Does leadership need to offload critical tasks to be more strategic?
>
> Is the business positioning itself to explore new possibilities?
>
> Or does the operation need to ramp up internal bandwidth for competitive growth?

When faced with such considerations, it can be tough to determine which employees can be entrusted to spread their wings.

So here are the seven factors to weigh when it comes to delegating dutifully and without doubt.

THEIR BASES ARE COVERED.

If an employee consistently does their work, producing expected deliverables or completing core tasks satisfactorily and on time, then they can probably do a bit more. Reliability brings peace of mind. You don't want to dole out more tasks to someone who can't meet deadlines, always has an excuse, submits sub-par products or only periodically does the basics.

THEY HAVE A CAREER VISION.

When you ask employees where they want to be in five years, a select few have a clear answer. Even if they don't name a specific title, they can describe the kind of work they aspire to do and why. Individuals with clear goals and dreams are more likely to be vested in their growth. They won't shy away from the chance to show what they're really capable of.

EVERYONE WANTS A PIECE OF THEM.

If you can't seem to stop the flow of requests from other teams for a specific employee's help, input or time, that's a sign that you've got a good thing on your side. It shows that others trust the guidance, work and results this person contributes. Plus, they probably showcase sound people skills – communication and collaboration.

THEIR PERFORMANCE PASSES THE TEST.

Review your team's performance appraisals. Look for patterns. Is there a track of record of exceeding expectations? A history of improvement? Annual employee reviews provide a great baseline for quantifying who truly has the chops to take on next-level assignments.

THEY ARE FULL OF IDEAS.

Does the employee always seem to have something brewing in their mind? Are they often offering new perspectives, fresh ideas or novel insights? If so, they're probably interested in not only their own growth, but also that of your industry and company. That excitement is a telltale cue that the same enthusiasm will be brought to new duties and tasks.

THEY ARE LIFELONG STUDENTS

You've spotted a team member who subscribes to industry journals, belongs to professional associations and attends career-focused groups in their free time. Maybe they've even earned a new credential or two on their own dime. Such talent is probably ready for what's next – and they may be a flight risk if not given expanded opportunities.

THEY SHINE UNDER PRESSURE.

Your star staffer has never encountered a challenge they couldn't handle. They neither bend nor break (or complains) under pressure. Emergency requests, last-minute client demands, unexpected needs to work late...this go-to player is always up for a challenge. In fact, the seemingly impossible lights a fire under them.

Must. Should. Could.

Use this as an objective plan for what must get done each day – followed by what should get done and then what could get done.

PRO TIP: Start on 'must' — though you may be tempted to skip to 'should' and 'could.'

With this, you'll now have a better idea of what is important in terms of what you must do and what you can potentially give away.

MUST: MISSION CRITICAL

_____

_____

_____

SHOULD: IMPORTANT

_____

_____

_____

COULD: NICE TO HAVE

_____

_____

_____

Courageous Conversations Cheat Sheet

You've learned what a courageous conversation is and what it should look like. Now, it's time to apply what you've learned.

By following these steps and using these tips, you can have courageous conversations with your team and help foster an environment of success and coaching in your organization.

PREPARATION: GATHER THE FACTS AND SEEK TO UNDERSTAND

As you prepare, remember the following:

Anticipate how the conversation may go. Think through the various ways the person might respond and have some ideas about how you will handle each possible scenario.

Make the conversation about the issue or behavior – not the person. What can you use to keep the conversation from being accusatory and negative?

Avoid having a laundry list of grievances that you want to address because you won't be able to effectively coach or find a solution to a long list of issues.

Check your emotions. You might be upset or angry, but if you want a solution or to give productive feedback or coaching, shifting those emotions to curiosity and empathy will result in a more productive outcome.

PREPARATION: QUESTIONS TO ASK YOURSELF

- ☐ WHAT DO YOU KNOW?

- ☐ DO YOU NEED TO SPEAK WITH OTHERS TO GAIN MORE INFORMATION? IF SO, WHO?

- ☐ WHAT EXPERIENCE DO YOU HAVE WITH THIS ISSUE OR PERSON?

- ☐ WHAT MIGHT THE PERSPECTIVE OF THE PERSON YOU ARE GOING TO TALK TO BE?

- ☐ WHAT IS YOUR GOAL OF THE CONVERSATION: IS IT TO GAIN UNDERSTANDING? GIVE FEEDBACK? COACH?

HAVING THE CONVERSATION

- ☐ **Ask Permission.** As you begin, consider asking permission to initiate the conversation, such as:

  'Hey. I have a difficult conversation I want to have with you. Would you mind if I shared it with you?'

  – or –

  'Hey. I have some feedback that I'd like to share with you. Are you open to hearing it now?'

- ☐ **Ask Questions.** The goal here is to gain their perspective, invite ownership, and help solve the issue. Then, give them the opportunity to respond – and you listen.

  Here are some questions to help you get started:

  - What happened with _____?
  - Can you tell me about your thought process around _____?
  - I'm curious about _____. Can you tell me more?
  - Can you explain the situation to me?
  - Can you walk me through what happened?
  - Have you thought about it since?
  - Did this affect anyone else? If so, in what way?
  - In retrospect, what would you have done differently?

☐ **Identify a solution.** If this scenario is something that can be coached and a solution found, ask:

- What needs to happen next time?
- What are some actions we can take that will support that?

☐ **Develop a follow-up plan.**

- Agree on what moving forward looks like.
- Identify what follow up you will take as their leader.
- Identify what they are responsible for as the employee.

☐ **Paint the vision for them.** Paint the vision of what it will look like next time when the new plan is in place and be sure to let them know you are there to support them.

Identify Your Why

Step 1. LIST THE TOP SERVICES YOU PROVIDE.

Service:

_____

Service:

_____

Service:

_____

Service:

_____

Step 2. LIST THE IDEAL RESULTS FOR YOUR CLIENTS.

Result:

_____

Result:

_____

Result:

_____

Result:

_____

Step 3. LIST WHY THAT RESULT IS IMPORTANT TO YOUR CLIENT.

Why Result:

_____

Why Result:

_____

Why Result:

_____

Why Result:

_____

Step 4. TAKE EACH WHY FROM ABOVE AND INSERT IT INTO A SAMPLE WHY STATEMENT

I/we believe:
I/we exist to:

_____

I/we believe:
I/we exist to:

_____

I/we believe:
I/we exist to:

_____

I/we believe:
I/we exist to:

_____

Step 5. ASK YOURSELF 'BUT WHY' FOR EACH STATEMENT UNTIL IT RESONATES

Do this until you come up with an answer that really hits the core of why you exist as a business.

But Why:

_____

But Why:

_____

But Why:

_____

Step 6. RECORD YOUR WHY STATEMENT BELOW.

When you're ready to share it with your team, decide if this is an opportunity for collaboration and feedback or if the statement is set in stone.

FINAL STATEMENT

_____

_____

_____

How To Define Your Values

STEP 1: PLAN

Complete A Brief. A brief describes the purpose and requirements of defining your organization's core values. Ask yourself …

- Why is this worth doing?
- What is the end goal?
- Who is this for?
- Who needs to be involved?
- What requirements do we need to meet?
- What constraints do we need to work within?
- When does this need to be completed?
- What questions need to be answered?
- Where will this appear, and in what format?
- How will we measure success?

Hold A Kickoff and Planning Meeting. Invite people you believe should be involved in the project and use the meeting to finalize requirements, participants, roles, and timeline.

STEP 2: DISCOVERY

Conduct Research Interviews. Speak with a representative sample of employees and leaders. Be sure to explain that there are no right or wrong answers. Ask them …

- What are our strengths as an organization? Why are they strengths?
- What are our weaknesses as an organization? Why are they weaknesses?
- Tell me about an action the organization took, or a decision it made, that you believe was right. Why do you believe the organization chose to do that?
- Tell me about a crisis or challenge the organization faced. How did our team respond to the situation? Why did they respond that way?
- Walk me through a meaningful moment you experienced while working here. What happened? Why was that moment meaningful?
- Choose three words to describe the team at our organization. What are they?
- What one thing will our organization be remembered for?
- Is there anything I haven't asked that you'd like to add?

STEP 3: DEFINITION

Identify Themes. You've collected research. Now, it's time to synthesize that information so it can guide the drafting of your organization's core values.

- **Gather The Comments.** Transcribe them to individual Post-It notes on a whiteboard, or paste them into individual cells in a spreadsheet column.
- **Group The Comments.** Read the comments and look for connections and patterns. Group together comments based on affinities they seem to share. You may also choose to group together groups, creating a hierarchy of categories.
- **Label The Groups.** Write a name or phrase that describes each group's affinity.

Write The First Draft. Don't worry about wordsmithing and refining just yet as this will go through several rounds of feedback and revision. Be sure to …

- **Focus On Strengths:** Don't assign importance to something you're not good at as an organization.
- **Speak To Your Audience:** Who are your values for? Use words that mean something to them.
- **Evoke Emotion:** As humans, we give importance and ascribe meaning to how we feel.
- **Limit The Number:** A long list of values will be difficult to recall. Keep it in the three-to-nine range.

Collect Feedback. Share your rough draft with internal stakeholders and ask for feedback.

Perform Revisions. Make revisions based on the feedback you receive, and share the new draft with stakeholders for new feedback. Repeat the process until a final draft of the values statement takes shape.

STEP 4: DELIVERY

Communicate The Core Values. Share the final values statement with employees and explain its intended use. The reveal should be anticlimactic; though the statement might be original in its wording, the essence of each value should be obvious.

Circulate The Values Statement. Reproduce the core values statement in different formats and circulate far and wide among internal stakeholders.

STEP 5: LIVE OUT YOUR VALUES EVERY DAY

Then – and this is critical – make sure everyone memorizes your values.

But not just a short-term memory recitation. You could even consider incorporating periodic quizzes to ensure everyone has committed them to memory for the long haul.

Be sure to weave them into every corporate event and every team meeting, so they become common language for your team and provide the foundation and framework for everything you do.

You want everyone to be able to not only talk the talk, but walk the walk, embodying and reinforcing each value so that in everything you do, you are that value. Your people embody and personify those values.

Your values don't end once this worksheet is complete. It should inform every decision you and your organization make – and everything else will fall perfectly into place.

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