

How to Lead Virtually - A Guide for New Practitioners

Now, more than ever before, leaders are tasked with new challenges and barriers when it comes to leading a team in a virtual environment. This environment has forced many outside of their comfort zone and is challenging leaders to lead their team in a new way with a focus on engagement, connection and team culture. This resource is meant to be a guide for new practitioners who are leading in a virtual environment. Please utilize this resource to identify some best practice tips and tricks to succeed as a virtual leader. If you would like more information regarding a specific aspect of virtual leadership, please visit the appendixes below.

Productivity	<ul style="list-style-type: none"> ✓ Clarify team roles and expectations at the beginning. ✓ Maximize technology resources to support various team tasks. ✓ Utilize data and time studies to identify areas of opportunity.
Engagement	<ul style="list-style-type: none"> ✓ Engage your team by maximizing your use of various virtual platforms. ✓ Set virtual meeting norms so your team has clear expectations. ✓ Encourage use of cameras to increase engagement and connection.
Communication	<ul style="list-style-type: none"> ✓ Determine preferred routes of communication. ✓ Develop team “huddles” to engage team members and provide timely information. ✓ Evaluate effectiveness of current communication styles to provide clear and timely information.
Connection	<ul style="list-style-type: none"> ✓ Build virtual breakrooms and time for team-building exercises. ✓ Meet frequently one-on-one with team members to connect with them individually and learn what successes and challenges they have had. ✓ Provide frequent feedback to team members.
Goal-Setting	<ul style="list-style-type: none"> ✓ Identify and create S.M.A.R.T goals as a team. ✓ Determine action items and assign responsible parties for each goal. ✓ Evaluate progress of each goal on a regular basis.
Empowerment	<ul style="list-style-type: none"> ✓ Empower each team member to share their strengths with the team. ✓ Support team members’ ideas and concerns. ✓ Encourage team members to openly and freely express when concerns arise.
Culture	<ul style="list-style-type: none"> ✓ Prioritize the team’s health and well-being. ✓ Celebrate each other’s personal and professional successes. ✓ Create an environment that is free of all forms of discrimination.

Appendix A: Productivity

A productive team is essential. As a leader in a virtual environment, there are many different resources and applications that can be utilized to promote productivity and efficiency. All applications are not for every team, with pros and cons for their use. Please see the table below to review the various resources and applications that can help your team effectively manage their tasks.

Resource Name	Access	Pros	Cons	Who is this resource ideal for?
Asana	Free ¹	<ul style="list-style-type: none"> • Ability to view projects in multiple “views” • Email integration • Able to view all tasks in one place 	<ul style="list-style-type: none"> • Team limited to 15 members with free version • Heavily text-based • No ability to assign multiple team members the same task 	<ul style="list-style-type: none"> • Teams or individual wanting ability to view work in multiple formats • Teams or individuals wanting the ability to easily prioritize tasks
Microsoft Teams	Institutional subscription required	<ul style="list-style-type: none"> • Part of Microsoft Suite- directly compatible with Word, Excel, etc. • Ability to create distinct teams and sub-units • Message board can be followed separately from email • Secure platform for sharing files 	<ul style="list-style-type: none"> • Can be difficult to use if not installed on your laptop • Requires Microsoft Office 365 individual or institutional subscription to access 	<ul style="list-style-type: none"> • Institutions looking for an all-in-one solution which provides instant messaging, task management, secure file sharing, and several other elements
Microsoft To Do	Free	<ul style="list-style-type: none"> • Ability to assign tasks within distinct areas • Can share tasks with other individuals for collaboration 	<ul style="list-style-type: none"> • Microsoft account required in order to share tasks • No ability to gauge progress within each task 	<ul style="list-style-type: none"> • Individual task management

Monday.com	Free ²	<ul style="list-style-type: none"> • Ability to view projects in multiple “views” • Ability to automate repetitive tasks 	<ul style="list-style-type: none"> • Requires some trial and error to determine the most effective way to display information 	<ul style="list-style-type: none"> • Individuals/teams needing to track the progress of numerous tasks and looking to integrate with other programs
Pomodoro	Free	<ul style="list-style-type: none"> • Helps to focus on individual tasks 	<ul style="list-style-type: none"> • Not for team collaboration 	<ul style="list-style-type: none"> • Individuals hoping to focus on specific tasks
Skype for Business	Institutional subscription required	<ul style="list-style-type: none"> • Provides easy way to reach team members which doesn’t clutter email inboxes 	<ul style="list-style-type: none"> • Team members may feel overburdened if they are constantly being messaged when their status is “busy” 	<ul style="list-style-type: none"> • Securely messaging team members without causing additional inbox clutter • Easily communicating personal availability when team members have questions
Trello	Free ⁴	<ul style="list-style-type: none"> • Multiple people can edit the same Trello “board” • Great for project tracking and assignments • Easy to identify project responsibilities 	<ul style="list-style-type: none"> • Limited number of boards for the free version • Requires some trial and error to determine the most effective way to display information 	<ul style="list-style-type: none"> • Individuals/teams needing to track the progress of numerous tasks • Kanban board project viewing to visually depict work at various stages of the process

Legend

1. Basic version is free for individuals and teams. Premium, Business, and Enterprise plans are available.
2. Student version is free for the duration of student studies. Upgraded Standard, Pro, and Enterprise plans are available.
3. Free 30-day trial available. Individual, Business, and Enterprise subscriptions available.
4. Access up to 10 “boards” for free. Subscription required for additional “boards” and add-on features

Appendix B: Engagement

As a virtual leader, engagement is a crucial aspect of leading a team in a new and exciting way. The virtual environment can have its own unique challenges in engaging your team members effectively.



VIDEO ON- SET THE PRECEDENCE
AS THE LEADER



NO MULTITASKING



SET AND KNOW THE
EXPECTATIONS ON WHEN AND
HOW TO USE "VIRTUAL
BACKGROUNDS"



SET MEETING "NORMS" SO
TEAM MEMBERS CAN ENGAGE
EFFECTIVELY

There are a variety of virtual platforms that can be used to engage your team members effectively. Each platform has pros and cons for use. Please see the table below for some examples of different virtual platforms and how they can be used to engage your team members. It is important to note these platforms may not be secure and individuals should use caution if needing to share protected information. The varying levels of security may impact your institution's privacy policies and agreements.

Different Virtual Platforms	Tips and Tricks to Use Effectively
Google Hangout	<ul style="list-style-type: none"> • Very versatile where individuals can use one platform for messaging, video conferencing, or social networking with Google+

<p>Microsoft Teams</p>	<ul style="list-style-type: none"> ● Utilize wide array of add-on features (e.g. Microsoft Planner and polling features) ● When creating meetings within Teams, assign meeting roles (organizer, presenter, and attendee) ● Utilize ability to assign specific groups and “tag” group members
<p>Webex</p>	<ul style="list-style-type: none"> ● Utilize whiteboard sessions for collaboration and brainstorming ● Encourage use of the chat box for larger audiences
<p>Zoom</p>	<ul style="list-style-type: none"> ● Best Zoom Practices Guide ● How to hold effective meetings - ASHP Connect ● Wide array of add-on features (breakout rooms, polling, whiteboard, screen-sharing and chat function) ● Variety of subscription options and costs to allow for varying needs including meeting-time limits and meeting size ● Functionality to record meetings to archive or share with absent team members
<p>Large Audience Virtual Platforms</p>	<ul style="list-style-type: none"> ● Broadcasting Only <ul style="list-style-type: none"> ○ Facebook Live <ul style="list-style-type: none"> ■ Includes the ability for individuals to comment on the video during and after the live video is broadcasted ■ Ability to communicate with video host via chatbox ● Virtual Event Platforms <ul style="list-style-type: none"> ○ Great options for very large group (50-100+ individuals) gatherings and interaction ○ Has the ability to network and interact with other group members in succinct, controlled fashion ○ Requires a fee to utilize service <ul style="list-style-type: none"> ■ Remo Conference ■ Hopin ■ vFairs

Additional Reading:

- **ASHP Connect Article** - [Ice Breakers for Virtual Meetings](#)
- **Harvard Business Review** - [Running a Virtual Meeting](#)
- **Harvard Business Review** - [How to Elevate Your Presence in a Virtual Meeting](#)
- **Hartford Funds** – [Conduct an effective virtual meeting with ease while avoiding the most common mistakes](#)
- **Toastmasters.org** – [Online Meetings](#)

Appendix C: Communication and Connection

Leading virtually requires extra attention in communicating with your team to overcome the lack of in person connection. These challenges can be readily addressed and managed with the following. Below you can find additional strategies, resources, readings, and methods to improve your communication skill set and connect with your group virtually.

Communication Strategy with Team Members	Rationale
<p>Standard Communication Pathway</p>	<ul style="list-style-type: none"> ✓ Establish who to contact with questions or concerns ✓ Promote how concerns are to be addressed and when ✓ Create deadlines and date of next follow up at each point of contact
<p>Frequency</p> <p>How often you communicate should reflect the task</p>	<ul style="list-style-type: none"> ✓ Allow team members to determine which frequency is most productive and update as needed ✓ Utilize regular status updates when active discussion is not needed, use scheduled emails, recorded video messages, or monthly meetings for this purpose
<p>Format</p> <p>The type of communication should reflect the content</p>	<ul style="list-style-type: none"> ✓ Emails are preferable for quick messages ✓ Telephone calls can be used for quick, one on one conversations and updates ✓ Virtual meetings are ideal for conversations with greater than two people
<p>Team Members Discussion</p> <p>Virtual communication strategies require extra attention with larger groups</p>	<ul style="list-style-type: none"> ✓ Avoid messaging all team members when the message doesn't pertain to everyone ✓ Use the smallest possible group needed when having discussions to save the time of non-contributing members and to lead a more efficient discussion ✓ When meeting virtually, utilize breakout rooms in large meetings to allow discussion before converging back into the large group for feedback
<p>Addressing Virtual Apprehension</p> <p>Some 'shyness' or 'awkwardness' with virtual communication is expected. Use these moments to lead your team and speak up for the group</p>	<ul style="list-style-type: none"> ✓ Leaders must engage with their team members through technology difficulties and struggles ✓ Utilize assigning team members to present their roles or updates to keep them engaged with the team ✓ Structure conversations to allow all team members the avenue to share their thoughts ✓ Call on team members directly to update the team or share their thoughts ✓ Connect with team members through group activities and team building resources to improve team rapport and camaraderie while virtual.

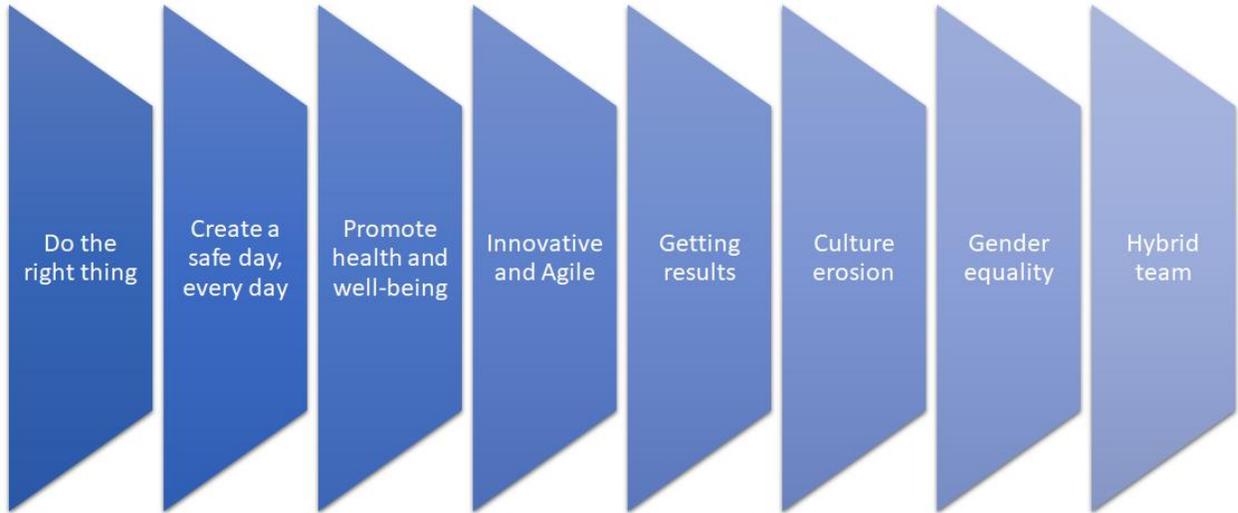
<p>Group Activities and Team Building Resources</p> <p>Use these virtual resources to improve team connection and make up for being unable to meet in person</p>	Teambuilding.com or Teambonding.com	Virtual group activities focused on teamwork
	Airbnb Online Experiences	Light online social group activities
	Virtual Happy Hours	Structured virtual time for casual conversations
	Trivia Games	Virtual multiplayer game activity

Additional Reading:

- **Teambuilding.com** - [51 Fun Virtual Team Building Activities, Games, & Ideas in 2021](#)
- **Psychology Today**- [Virtual Space bias](#)
 - Loss of normal perception can lead to distrust in virtual experiences or cause audiences to become easily detached.
 - [5 Overlooked Virtual Leadership Suggestions](#)
- [“Read This Before Our Next Meeting” by Al Pittampalli](#)

Appendix D: Culture

Creating a positive and welcoming team culture is an essential component for a team leader. Setting the culture of the team can be difficult for any leader but there are new strategies and challenges that can arise in a virtual environment. This resource can help the virtual leader address wellness and burnout as well as ensure that a team’s culture crosses over into a virtual network. Below are some key parts of building the right team culture. Each aspect should be considered to ensure a positive culture within your team.



Checklist for Preventing Burnout and Creating a Positive Culture

- ✓ Set email expectations:
 - No expectation answer emails outside of the work day or on the weekends
 - Use clear messaging in the subject line of emails and instant messages (example: Action required, due dates, FYI, etc.)
 - Use bolded terms to indicate key points
- ✓ Create no-meeting zones
- ✓ Encourage celebrating each other
 - Take some time at the beginning of meetings to share the good things that are occurring or answer a fun question of the week
 - Share kudos with one another
- ✓ Schedule regular breaks for your team

Additional Readings:

This document provides structure and further insight on how to prevent burnout through the development of different wellness resources. It also discusses other key topics such as email courtesy and importance of scheduling breaks.

- <https://www.advisory.com/Daily-Briefing/2021/01/19/exhausted>

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