McChrystal Group

Remote Work
Checklist & Best Practices

Working remotely requires excellence in three categories

1 TECHNOLOGY
Necessary tech systems to effectively execute remote operations

2 BEHAVIORS
Participants know what behaviors increase the effectiveness of remote operations

3 STRUCTURE
Meeting structures that provide operational clarity for remote operations

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1 TECHNOLOGY
Check the necessary tech systems to effectively execute remote operations

ORGANIZER CHECKLIST

- ✓ Video of main room
- ✓ Chat function
- ✓ File sharing
- ✓ Archive of chat & files
- ✓ Phone dial-in option
- ✓ Recordable

TECHNOLOGY CHECKLIST

- ✓ Raise-hand function
- ✓ Mobile accessibility
- ✓ Video for all presenters
- ✓ Mic for all presenters
- ✓ Chat function available to all participants

PARTICIPANT CHECKLIST

- ✓ Mute mic; Unmute before speaking
- ✓ Turn on video camera
- ✓ Message moderator if you have an important point to raise
- ✓ Relay other relevant information via chat

2 BEHAVIORS

Know what behaviors increase the effectiveness of remote operations

⊕ CRAFT A PURPOSE

A **meeting purpose** allows all information and conversations to support the desired goal

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🗺 SET RULES OF ENGAGEMENT

- o **Role model** positive leadership behavior
- o **Seek opportunities** to make decisions
- o **Connect** with other teams and leaders, or on cross-functional opportunities
- o **Assume positive intent**
- o **Be physically and mentally present**
- o **Get the big issues on the table**
- o **Ask** direct questions to a team lead or individual

👥 DEFINE ROLES

EVERYONE
- o **Request** information that you need from others
- o **Actively listen and identify what happened, what it matters, and what can be done about it**
- o **Signal to the moderator** by showing your video or raising your hand if your input needs to be raised immediately

BRIEFERS
- o **BLUF:** state a bottom line upfront (BLUF), your main point, before providing additional narrative
- o **Keep your questions open,** you don't know who in the organization has the information you need
- o **Pay attention** to time allocation, volume and tones

3 **STRUCTURE PT. 1**

Support and provide operational clarity during remote operations

GUIDANCE ON MEETING STRUCTURE

DESIGN

Set the Foundation for Information Flow

- Align the team
- Sequence meetings to ensure progress
- Empower operations to manage meeting cadence

Define the Meeting Purpose

- Adapt meetings that you currently have
- Decide the meeting format
- Define meeting purpose

Structure the Agenda to Drive Outcome

- Assign an agenda owner
- Use the objectives to inform the agenda
- Allot time after agenda is set

Ensure that Attendees Know Their Role

- Invite participants who support the purpose
- Define roles in the invite
- Clarify prep needed

LEAD

Nail the First and Last Five Minutes

- Kickoff meeting with focus on objectives
- Define desired outcomes of meeting
- Close with actions required and next steps

Facilitate the Meeting, Don't Drive

- Provide continuity through guided discussion
- Allow participants to play their role
- Engage key voices

Seize Moments to Develop Team

- Reinforce right dialogue through feedback
- Unpack leaders' process

ENGAGE

Focus on the Task at Hand

- Come prepared with objective and role
- Use a camera
- Re-orient to objective when needed

Move the Ball

- Identify the impact and dependencies when speaking
- Answer "What? So what? Therefore?"
- Clarify action items and owners

Use Candor to Connect

- Raise the tough decisions
- Recognize valuable contributions
- Direct discussion to each other, not leader

3 STRUCTURE PT 2
Support and provide operational clarity during remote operations

GUIDANCE ON ROLES + RESPONSIBILITIES

ROLE	RESPONSIBILITES	HOW
SPONSOR	• Set the tone • Communicate importance of forum	• In opening comments, share current progress on major projects
FACILITATOR	• Execute logistics • Ensure accountability • Facilitates conversation	• Remind participants of expectations during forum • Assign and track action items
BRIEFER	• Input information concisely • Connect it to relevant lines of effort	• In 3 minutes or less, communicate "so what" and "therefore"
OTHER PARTICIPANTS	• Push and pull additional information	• Share link to materials on a similar past project