Building + Facilitating Agile, Remote Teams: An Operating Manual
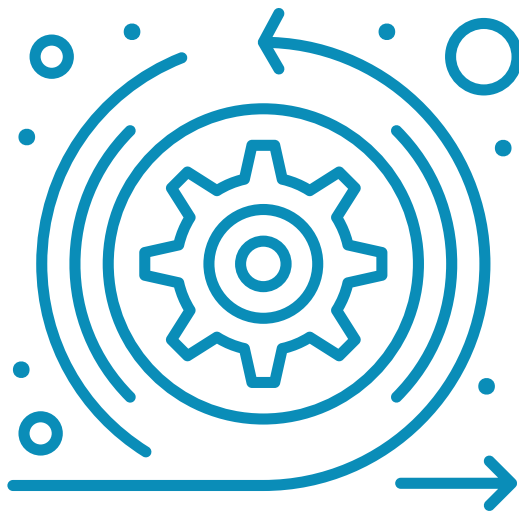
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Contents

Introduction

When a colleague asked about my secret sauce for team-building, I decided to share my experiences to save you time, heartaches, and headaches, and offer a whole-person-centered perspective you might not have considered previously.

I have noted lessons on how to build strong teams for almost two decades. I've worked with fully and partially co-located teams, and with globally-distributed teams, juggling wide-ranging time zones from PST to IST (Indian Standard Time).

Most of what I've read and experienced related to building highly-functioning teams leans heavily on the quantitative and measurable, and focuses less on the soft skills and emotional intelligence (EI or EQ). That said, I have some things to add to the conversation.

Here are my tips for leaders of software development companies, developers, Product Owners and fellow Scrum Facilitators, informed by boo-boos I've made in my career and those I've watched others make. I've also absorbed countless books and podcasts. And, of course, I've collected wisdom from awesome co-workers and mentors along the way.

Communication

Solid communication is a must-have, a make-or-break element.

Communication builds trust.

In organizations where communication is lacking, chances are, so is trust.

Share prolifically.

Be willing to say the hard things (constructively and with empathy).

Be transparent and truthful.

Don't assume all stakeholders/team members are communicating with others in ways you'd expect of them. For example, as a consultant Scrum Master, I often have more interactions with individuals than they might have with their managers. Their managers tell me things they aren't telling their direct reports (but should be). So, for the managers and facilitators reading this, I suggest you do your best to communicate everything you know to those who need to know it (as long as you are not violating the trust of another).

Create an environment where people can speak openly. This means they are not in fear of repercussions for sharing what might be unpopular opinions.

Remind the team that disagreement can be healthy for a project/product when presented in a mutually respectful way. When disagreements arise, honor people's passion and dedication, and redirect them towards solutions.

Avoid gossip. Don't engage in it and don't pass it along. It will come back to bite you and there's nothing productive to come of it.

There's no place for dogma. Anywhere. It alienates people and can diminish one's credibility.

Communicate the why and, if need be, the how. Though, usually providing the why is enough to empower your teams to figure out the how.

Don't forget the introverts. They are the quiet ones in the room who think and listen more than they fight for space to speak. They hold answers to your questions.

Be clear on expectations. When there's a problem, it's likely a misalignment of expectations.

Ask questions to gain understanding, and be mindful that some people find questions threatening. There's a difference between questioning someone and asking them questions.

Be the translator, where needed. If it becomes clear to you that two colleagues think they are saying the same thing and you notice a disconnect, for example, rephrase it and check for understanding.

If working with global or multinational teams, be aware of the use of jargon and other colloquialisms.

Encourage your team members to make their contributions known, and celebrate them. (See more in the Celebrations section below.)

Help surface the knowledge already in the room. You don't have to have all of the answers, and your teammates will feel valued when invited to contribute.

Biases, Allyship, Anti-racism
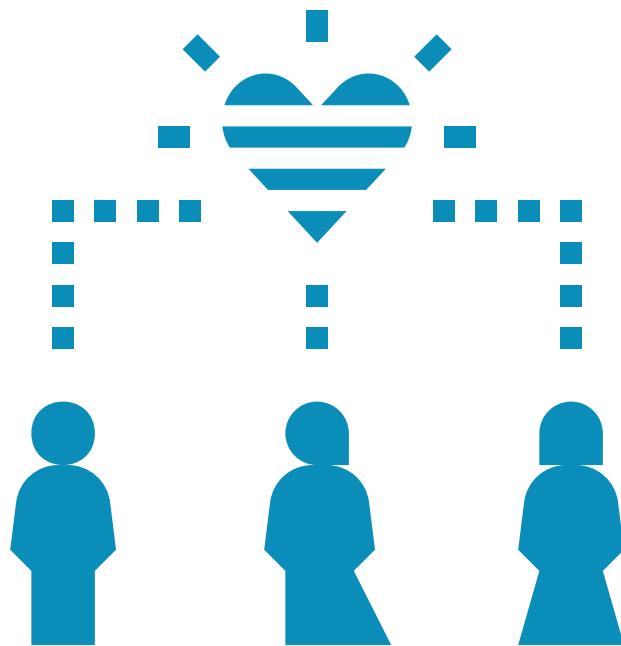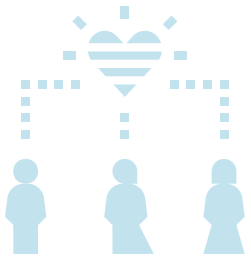
Diversity, equity, and inclusion must not be organizational afterthoughts.

Leaders, you need to be up front, intentional, and willing to have some difficult conversations in order to create a safe place for all of your employees that honors their identities and lived experiences.

Amplify quiet and underrepresented voices.

It's not enough to be an ally. It's about self-educating on systemic racism, active [anti-racism,](#) understanding and recognizing [White Fragility](#), and not remaining silent, none of these as performative allyship but as core to designing and operating an organization that truly values its people and their contributions.
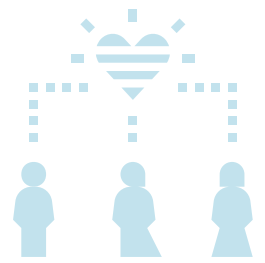
Be aware of whatever biases and privilege you hold, how it shapes the words you speak, and how those words may be received by your colleagues. And better yet, be inclusive in your language. Example: "You guys" is a tired male-oriented phrase that excludes. Sure, we're all used to it … but that doesn't mean we need to keep perpetuating it. Consider something like "you all" or "hey, team" instead.

Don't pretend that you don't have bias. It's better to start paying attention to where your unconscious biases/learned stereotypes lie.

Watch for microaggressions and make sure co-workers know those behaviors will not be tolerated.
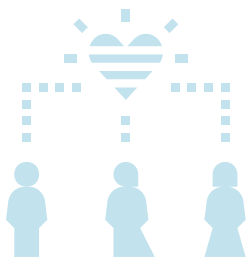
[Share your gender pronouns](#) (she/her/hers, he/him/his, they/them/theirs, etc.) Consider including them in your email signatures, social media profiles, name tags, and in-person introductions to normalize the practice and create an inclusive space for trans and non-binary individuals to feel comfortable doing the same.

Don't assume the pronouns of others based on appearances.

If sharing these at an in-person event, keep in mind that there are likely people in the room who have never shared their pronouns out loud in a group before. You can model what it looks like, explain the purpose, and not force it for anyone who chooses not to share. Ex: "Hi, I'm Becca and my pronouns are she/her." Sam's pronouns are they/them. "They suggested we revisit xyz topic in a separate meeting offline."

Practice using others' pronouns in a sentence correctly and continue using the correct pronoun even when that person is not around.
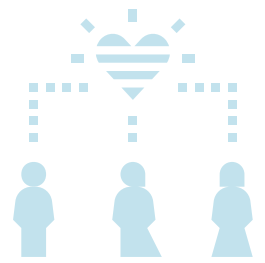
For more on the importance of using correct pronouns:

- [Talking About Pronouns in the Workplace | Human Rights Campaign](#)
- [Signature Samples | UCSF Lesbian, Gay, Bisexual and Transgender Resource Center](#)
- [Why sharing gender pronouns at work matters | Culture Amp](#)

Building Trust

When joining or managing a new team, take time to observe first. Sometimes employees and leaders land in a new organization and feel the need to change everything. This seldom goes down well. Take some time to get a feel for how your team and the organization operate before making sweeping changes.

Come in with a learner's mindset. (See more in the Mindset section below.)

Model positive behaviors to set the tone.

Strive to pronounce your co-workers' names correctly. Ask them how they pronounce their name if you aren't sure.

Bring your authentic and whole self to the team and encourage others to do so (see Authenticity section below).

Look for signs of fear as evidence of faltering/absent trust.

Don't freak out. Whatever the challenge, try to maintain a calm demeanor. It's OK to share your passion and be animated, however, don't resort to yelling, placing blame, or name calling.

Solicit feedback periodically and accept criticism calmly, considering not "Is it true?" but "In what ways is what they are saying true and helpful?"

Consider conducting your own personal 360 evaluation if your organization doesn't have that in place. (I did this with a simple web-based form last year and shared those questions in a [recent blog post](#).)

Encourage others to shoot holes in your theories. Read more about this in [Ray Dalio's Principles](#). Hear organizational psychologist Adam Grant discuss building his "challenge network" on [The Tim Ferriss Show (#399)](#).

It's OK to say, "I don't know (and I'll get back to you with an answer)."

It's also OK (and can even be beneficial) to show your [vulnerability](#). Yep, even in the tech world.

Take time to introduce yourself and new team members to each other.

Make people feel welcomed by highlighting their awesomeness.

Create opportunities for them to bond with their teammates.

1x1s are invaluable, especially if you are a manager with direct reports. Talk to your people. I've also found 1x1s really helpful as a Scrum Facilitator and Agile Coach. I schedule them when I join a new team and ask folks if they want to check in with me periodically.

Whenever co-located, share a meal. And put down the phones and talk with each other.

Compassion and Empathy

Care about the humans behind the work.

Ask how people are doing and mean it, and listen to their answers.

Bring warmth. Your team members – like you – are not tools/resources to be "utilized" or depleted. We all respond more positively and produce better work when kindness is the m.o.

Seek to understand what motivates people and their preferred working styles.

Psychological safety is key (while Google's practices are being challenged lately, and for good reasons, their work in this arena is powerful. See Project Aristotle.)

Most of us are walking around with internal stories of self-doubt and imposter syndrome.

People we work with every day have experienced and are experiencing various life traumas that we know nothing about.

Remember that everyone has a story.

As my amazing yoga teacher, [Jessica Patterson](), says, "everything is either an expression of love, or a need for love." Keeping this in my back pocket has been a game-changer.

We also all have our own perceptions of reality. I can't tell you how many times my husband and I have witnessed the same conversation and walked away with completely different takes on it. I have seen this numerous times in the workplace, as well.

Mission/Purpose

People thrive on having purpose.

Make sure your mission isn't just lip service.

Help your teams understand how their work rolls up to the broader organizational mission. And if there isn't a clearly defined and well-articulated organizational mission, work together to create a team mission.

With Scrum, in particular, sometimes teams get overly focused at the task level and can't see the forest for the trees. Make sure teams know what problems they're solving and why.

Help them surface their ikigai, their reason for getting up in the morning.

Authenticity-Centered Workplaces

Ask about people's weekends at the beginning of a call or check in periodically to ask about their kids/pets/hobbies/significant others.

Get to know each other as whole humans.

Your status-quo-challenging employees -- the ones who bring big ideas and value making an impact beyond "the way it's always been done" -- have the potential to be some of your greatest contributors. Don't be too quick to deny their passions and energy.

They can be misperceived as threats yet often are your most reliable team players. Consider re-framing your own mindset to allow for their full contributions. For example: Why does it feel like they are pushing your buttons? Is it really about their ego -- or yours? And when those status-quo-challenging employees stop making suggestions, dig deep to surface what's really happening in the organization. The organization might be on the verge of losing them.

Find time to play together. This could mean getting together for a recreational activity when you are co-located. Things like bowling, mini-golf, and go-karts can be a blast.

Be sensitive to personal and religious preferences when it comes to alcohol. The bar may not be the best place to meet.

Consider introducing [LEGO® SERIOUS PLAY®](#) as a tool.

Celebrate successes. More on that below.

Inject a little fun and personality. Deely boppers on a video call?!?! (Yes, they still make them. And yes, I have several pairs.)

Post that GIF (as long as it's not offensive).

See Stuart Brown's work on play:

- [Play: How It Shapes the Brain, Opens the Imagination, and Invigorates the Soul](#)
- [How Does Play Shape Our Development | TED Radio Hour on NPR](#)
- [Play Is More Than Just Fun | TED Talk](#)

Change
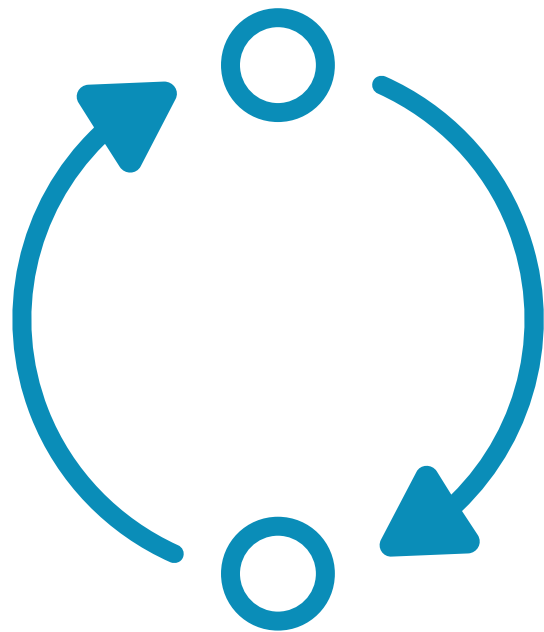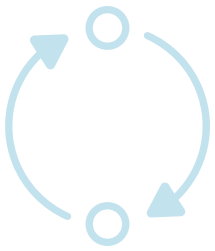
Again, the why matters. Communicate why there's a need for change. It's about communication and building trust.

Be sensitive to the team's working environment and introduce change only when necessary. Also keep in mind when other organizational/leadership changes been recently introduced and the impact additional change will have on your teams.

What is the tolerance level for such change at the individual and team level?

[Nudge](#) toward behavior changes, where possible. Mandates don't set well with independently-thinking humans.
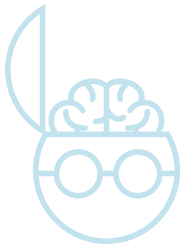If you must issue a decree, communicate a clear why.

Find allies on the team who are willing and ready to jump on board with the change, and to help bring along those who might be more resistant. Ipsita Dasgupta suggests in her TED Talk, [finding "co-conspirators."](#)

Create an environment of experimentation.

Mindset
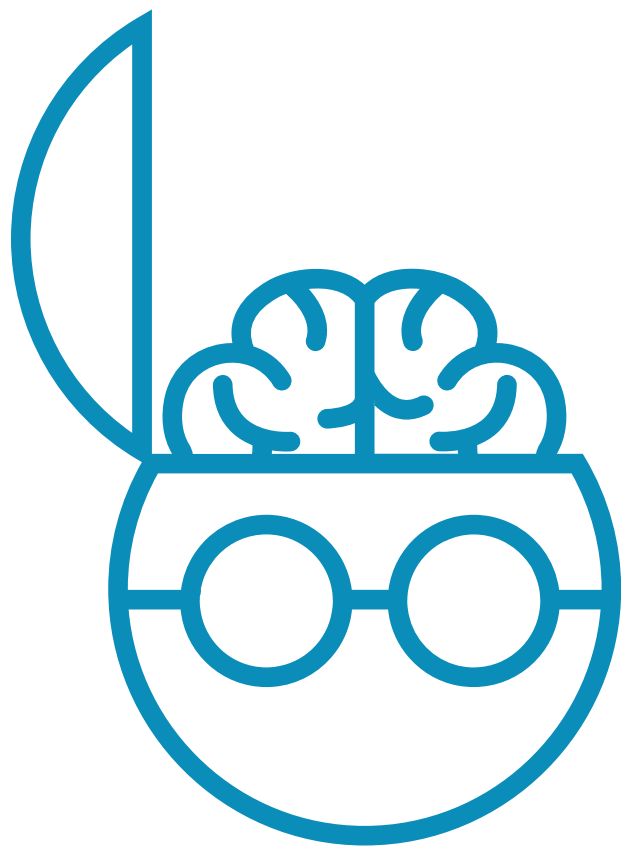
No need to take things personally.

Be open.

Always be learning.

Assume the best of people. If they are not doing their greatest work (and are not experiencing personal trauma that you know of as mentioned above), something may be off in the broader organization. Again, humans not robots.

Potential is not a destination or something to reach. It is neither finite, nor specific. The "finish line" will always be a moving target. Instead of trying to "reach potential," strive to be your best self at any given time and help others to do so, under any given circumstances. Your best self on one day might be different than another day.

Be kind to yourself and others.
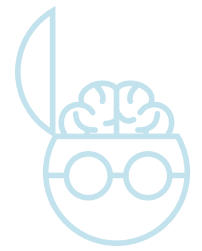
If you feel overwhelmed, [step outside; take a walk](). When you return, focus on your small slice of the pie and making that little slice the best it can be. Progress comes one step at a time. Ex: sometimes there might be organizational/political factors/changes riling you up that you can do nothing about. Focus on your own sphere of influence.

You, ICs, also play a role in shaping how your team jells. If your team is facing challenges, avoid throwing your hands up and saying, "that's above my paygrade" and remember that your attitudes and behaviors affect those around you, too. It's not just a manager/direct report conversation.

Cultivate growth mindsets over fixed mindsets (Carol Dweck) and a sense of abundance vs. scarcity (Stephen Covey).
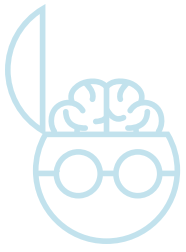
For more on Carol Dweck's work on growth mindsets:

- [What Having a 'Growth Mindset' Actually Means - Harvard Business Review | article by Carol Dweck](#)
- [How Praise Became a Consolation Prize: Helping children confront challenges requires a more nuanced understanding of the 'growth mindset' - The Atlantic | article by Christine Gross-Loh](#)
- [Mindset: The New Psychology of Success | by Carol Dweck](#)

Accountability

Be punctual, and if you're going to be late, communicate that to whoever is waiting for you.

Follow through. Do the things you say you'll do.

Don't make teammates and stakeholders chase you for information. Be proactive in keeping them informed of progress.

Keep an eye out for [learned helplessness](), especially in typically slow-moving industries and/or within organizations that have existed for decades.

Consider an iterative approach. Even if you aren't working in an Agile or Scrum environment, host a [Retrospective periodically]() to review what's working and what isn't, and adjust course, where needed. I especially love the [Speedboat]() exercise and the [4 L's](). (I host both remotely in a tool called [MURAL](). [Miro]() is another great tool.)

Own your mistakes and encourage others to do the same. Once again, it's a communication and trust-building thing.

Approach mistakes with an objective explorer's lens, not a finger-pointing lens. Try to separate yourself and the team members from any personal embarrassment or shame in honor of continuous improvement. Is there anything we could have done to prevent this from happening? How do we mitigate this in the future? How do we fix it to the best of our abilities now? Who needs to know about this?

See Etsy's model, [The Three-Armed Sweater Award](#), where people document mistakes and how they happened, then share them in public emails.

Toxic behavior quickly spreads and can stress out an otherwise high-performing team, resulting in productivity hits, anxiety, general discontentment and, ultimately, loss of talent/increased turnover. If you spot bully-like behavior, do what you can to directly yet calmly nip it in the bud. Don't tolerate it or enable it. (At the same time, remember that bully-like behavior is a sign of distress within that person; try to approach the situation with care for their well-being, as well.)

Celebrations

Give kudos profusely (not artificially).

Be your team's champion.

Celebrate even small wins.

Say thank you, especially when someone has gone above and beyond, but even for the little things.

Make sure team members know they are valued. It can be as simple as a personal note with specific praise, kudos on a Slack channel, or a gift after the go-live of a large initiative, as a few examples.

If celebrating someone publicly, also be mindful of how that feedback is delivered and the message it sends to others.

Are you unintentionally reinforcing negative behaviors? Are you praising someone for long hours worked when what your organization should be doing is praising someone for taking a vacation b/c there are challenges with work life balance/integration?

What behaviors do you want to encourage in others and how can public praise align with those behaviors?

Hiring, Onboarding + Deboarding
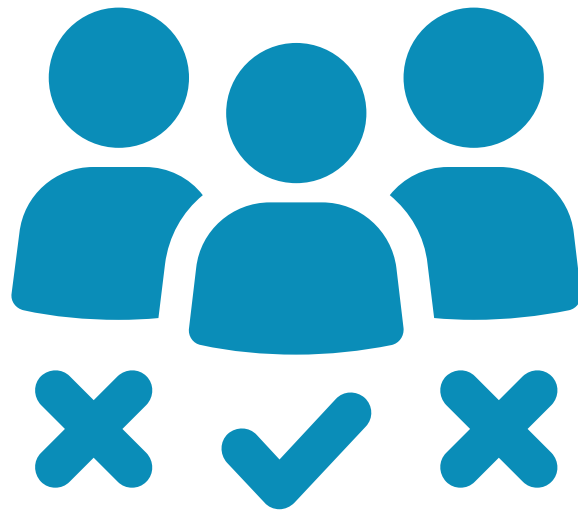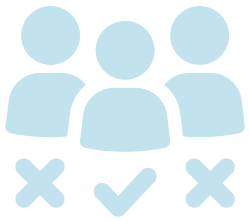
Team-building starts during the recruiting phase.

Where time permits, try to involve existing team members in the hiring process. Don't hire in a vacuum. This also helps the candidate get a sense for who they'll be working with.

Inform the team not involved in interviewing well in advance about the new person's pending arrival.

Good behavior throughout the process with all candidates has value… Rejected candidates could be potential clients later (or referrals).

Once in the door, give the new hire a buddy.
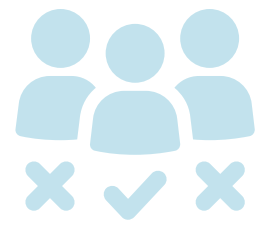
Make sure they know everything they need to get up and running. Checklists work great for this, but also touch base with new folks frequently in their first week. Ideally on video (for face-to-face interactions when distributed). Introduce them to key stakeholders/functions across the organization.

The deboarding process says just as much about your company as the onboarding process, so be intentional here, too. If this is handled well, former employees might also turn into future clients and referrals later on. The outgoing employee should fully understand what happens to their benefits, when their last paycheck will be, how their departure will be communicated to the rest of the organization, etc.

# Work Structure + Other Tactical Items
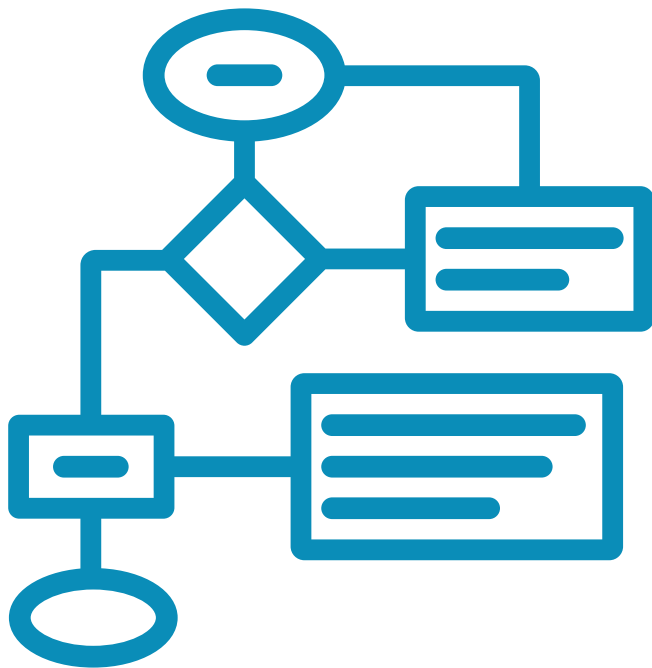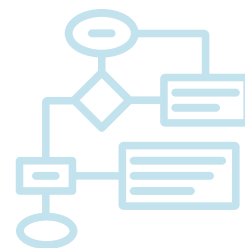
Create shared team PTO calendars and encourage use of out-of-office replies when folks are out.

Make the work (and its progress) clear and visible. Define it in terms of its ultimate value and purpose.

Have a well-articulated definition of done/exit criteria.

If working in tools like Slack or Microsoft Teams, make use of threads and channels to minimize noise.

Internal tools deserve great user experience, too. The "employee experience" is becoming increasingly important. Sometimes organizations only focus on strong UX for external, client-facing tools. When this happens, you are missing opportunities to help your employees do their best work.
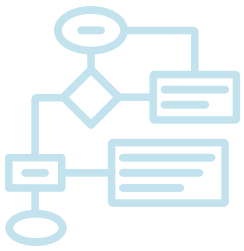
Estimating is hard and humans are terrible at it.

It's easy to fall prey to the [planning fallacy](#) and optimism bias, and underestimate the time it will take to bring a piece of work to completion.

Find a practical approach that works for you and your teams, and re-examine and learn over time.

Avoid getting hung up in the weeds. Make the best guess you can based on the information you have and keep going. If estimating person-hours, try to ballpark an item in terms of bigger buckets, as in, are we talking hours, days, weeks, or months? And then get more specific.

Repeatable tasks you've done before are easier to estimate than net-new items.
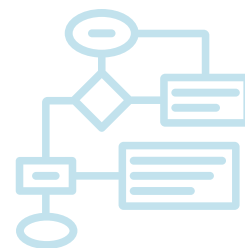
Also know that stakeholders often expect precision, which can make for some uncomfortable conversations and misaligned expectations. Meaning, don't over-commit, especially when details may not yet be clear. When teams commit to a date, that often gets cemented in brains and when that date shifts (it almost always does), be prepared to spend some social currency.

This can be partially mitigated by making the work transparent, and regularly communicating and demonstrating progress through a clear feedback loop as mentioned above.

Look for ways to automate repetitive, mundane tasks.

Don't be afraid to "break the rules." In Agile/Scrum environments especially, Scrum leaves intentional gaps and is not one-size-fits-all.
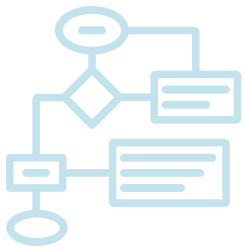
Build in think/create time. This is underappreciated in our culture of busy-ness. Yet top performers throughout history have used it to great value.

I am particularly a fan of [Mihaly Csikszentmihalyi's](#) theory on Flow. According to Flow theory, we feel happiest in the zone of appropriate challenge and skill. We get anxious when the challenge is too high and our skills are too low, and bored when our skills are too high and the challenge is too low. So, be thinking about how to create and cultivate the conditions for Flow state to arise.

Consider creating your own operating manual and sharing it with your team like Jay Desai of PatientPing describes in this [First Round Review article](#).

Context switching (jumping between tasks) is [expensive](#). Be mindful of it.
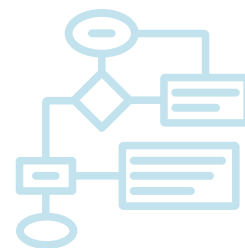
For more on Flow Theory:

- [Flow, the secret to happiness | TED Talk](#)
- [Flow: The Psychology of Optimal Experience](#)

For more on multi-tasking/task-switching:

- [The True Cost of Multitasking | Psychology Today](#)
- [Multitasking: Switching Costs | American Psychological Association](#)
- [How (and Why) to Stop Multitasking | Harvard Business Review](#)
- [Multitasking Damages Your Brain and Career, New Studies Suggest | Forbes](#)

Meetings
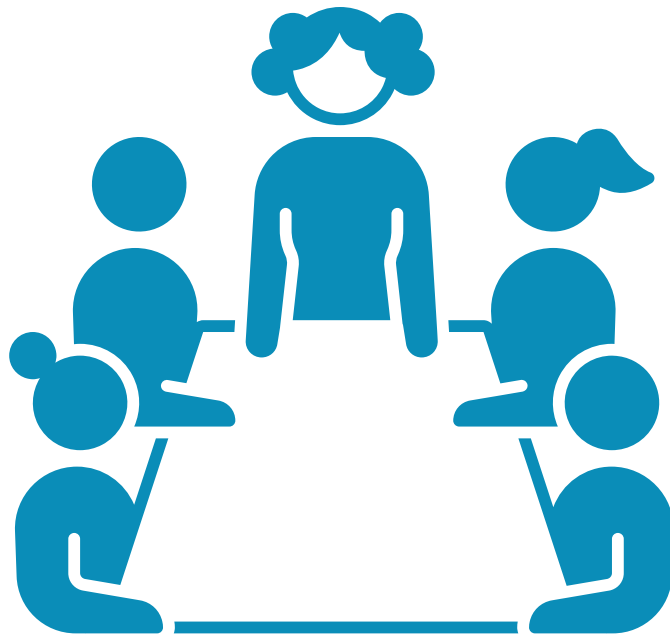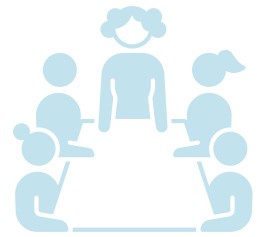
Try not to hold meetings, unless what needs to be addressed can't be handled with a brief email or by similar brief means.

When you must hold a meeting, set clear goals and an agenda so people know what is expected of their participation.

Don't take people's calendars for granted. Reach out prior to scheduling a meeting. Or, [don't share calendars as an organization](), as Jason Fried of Basecamp suggests.

[Consider making meetings optional]().

Be prepared. Have the appropriate windows and files open prior to starting the call.

Account for time zone differences and preferred working hours.
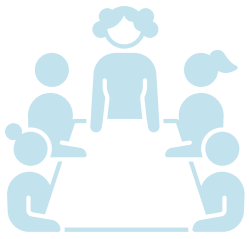
Give yourself a cushion between meetings and avoid scheduling back-to-back where you can. Allowing five minutes to clear your head and get ready for the next one is useful.

And don't accept a meeting just because someone invites you. It's perfectly reasonable to ask what you are expected to contribute and why it makes sense to be there.

Model and enforce good meeting behavior, such as not interrupting each other, being fully present, and [listening intently](). This includes minimizing multi-tasking and distractions.

Stay focused on the topic and redirect conversation, when needed.

Don't allow one person to hijack the meeting.

If someone isn't comfortable speaking in a large group, solicit their feedback in advance (and in writing, if that's the person's preferred mode of communication.)
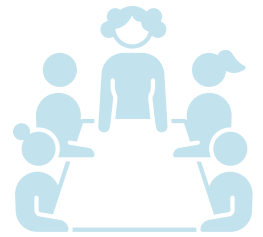
Make sure next steps are clear and [documented](#) by the end of the meeting (why, who, what, how, when). Schedule a follow-up on the spot, if necessary. It's way easier than trying to coordinate through email/checking calendars later.

For long meetings, plan breaks. ([Work for 52 minutes, ideally, and break for 17](#).)

It can be beneficial to occasionally hold video calls for remote teams. So much is lost when teams don't have access to the [non-verbal cues](#). At the same time, we've entered a new period during COVID-19 where [video calls can be especially taxing emotionally](#), so don't force it.

Open group brainstorming is not effective.
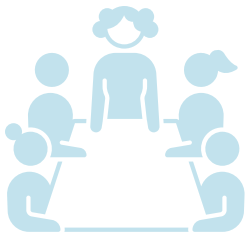
If working in a Scrum environment, try to keep the daily Scrum focused and limited to 15 minutes or less.

[Parkinson's Law](#) says the work expands to fill the time allotted. If the team veers off course (and isn't deriving value from the discussion at hand), it's OK to cut it off and ask them to take it "offline."

I deviate from this by sometimes extending daily Scrum to cover clarification time when working with globally-distributed teams. For example, if the daily Scrum is the only window during the day where teams have a chance to talk before the handoff of the work (in a follow-the-sun model), the teams I've worked with have seen value in that extra time for asking questions. And when there are no clarifications, we wrap in 15 minutes or less.
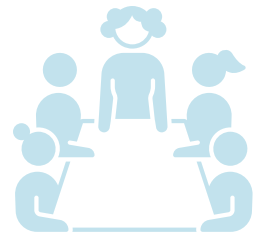
For more on brainstorming:

- [Why Group Brainstorming Is a Waste of Time | Harvard Business Review](#)
- [Brainstorming Doesn't Work -- Do This Instead | Forbes](#)
- [There's a Better Way to Brainstorm | Association for Psychological Science](#)

Summary

Building and maintaining high-performing teams takes effort, intention, an open-to-learning mindset, and ongoing reflection from all of us, regardless of our position in the corporate or entrepreneurship hierarchy.

It requires a foundation of trust, accountability, and strong and transparent communication, along with the ability to cultivate the conditions for people's best work and authentic selves to arise.

What resonates most with you?

About Becca

Becca Williams (she/her) is the Founder and Principal Consultant of [Thought Distillery](#).

As a Certified Scrum Professional, Certified Facilitator in LEGO® SERIOUS PLAY®, and Certified Yoga Teacher, Becca incorporates practices from various disciplines through her work as an independent facilitator, analyst, and Agile Coach.

She has several years of experience remotely setting up teams for success and has been challenging the status quo for as long as she can remember.

[Reach out to schedule a chat](#) about how Becca can help your geographically-distributed teams shine.