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How to Scale Your Business with a Virtual Team

A step-by-step guide for entrepreneurs and small business owners

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Introduction



The era of virtual teams has begun. With a growth rate of 140% since 2005¹, remote working has transformed from a techie perk to an operational standard. In fact, you would be hard-pressed to find a corporation that has not adopted some form of flexible work policy for its workforce.

Why the buzz? Businesses around the world are seeing that the benefits of remote work aren't just for workers. While the employee might enjoy the comfort of being in flip-flops at home, leadership benefits from reduced overhead costs, diversified

recruiting pools, and agile scaling. Moreover, 65% of full-time employees believe a remote work schedule would increase their productivity².

Companies around the world are learning how to capitalize on virtual tools and processes in many different ways. Some still maintain a centralized workspace, allowing team members to work from home once or twice per week. Others are jumping into the deep end of the pool by eliminating office spaces altogether, and converting to a 100% distributed model with employees clocking in virtually from around the globe.

What about you? Is a virtual team a good fit for you and your business? If you're unsure of your answer, consider the following questions:

Are you facing cost-pressure but still need to hire talent to bring your company to the next level?

Do you need people with specific skills that are difficult or too expensive to find in your area?

If you answered “yes” to either of these questions, you may benefit from a virtual team member. Hiring virtual team members may give you the agility, flexibility, and cost-saving measures that are so crucial during the early stages of your company's growth.

As two remote-friendly companies, Nomad City and Evernote have over a decade of experience working and growing virtual teams and know exactly what it takes to make remote work *work*. That's why we have put together a simple, 4-step guide that will help you build your first well-prepared and well-connected virtual team.

¹ <https://globalworkplaceanalytics.com/telecommuting-statistics>

² <https://www.forbes.com/sites/andrealoubier/2017/07/20/benefits-of-telecommuting-for-the-future-of-work/#7343131016c6>



— Preparing Yourself as a Leader

Virtual teams don't have a clear black-and-white definition. Each virtual team and its members sit somewhere on a continuum—between low- and high- virtuality. Some employees may work from home once or twice a week and still keep regular fact-to-face interactions with colleagues. Others are located in completely different countries with zero opportunity for face-to-face communication. Therefore, it is crucial that you are ready to lead and inspire others in ways which are effective virtually— even if you don't have a fully virtual team member.

Mentor Instead of Manage

The number one concern that most managers have in converting to a virtual model is, “How will I know that my team is working if I can't see them?” The answer is simple: you don't. Location-independence often means an independent schedule and self-management, so productivity may not be happening when and how you expect. But as long as the work gets done, does it really matter? This is where trust comes into play. You will need to fight off the urge to micromanage and trust that your team will follow the rules. The more you empower your team, the more they will feel that you value and rely on their abilities. When this happens, they will work hard to meet your expectations.



Put it into practice

Set an OKR or two

Set clear goals and measurements for your goals so that everyone is working on the right thing. We recommend a method called Objective and Key Results (OKRs).

What are the benefits of OKRs?

1. Make the goal setting process more disciplined.
2. Clarify expectations employees so they're working on the right things.
3. Enable better communication and conversations through transparency.
4. Establish indicators for measuring progress and success.
5. Align goals throughout the organization.

To keep track of OKRs, use a tool such as Betterworks, which also has step-by-step guides to help you get started with your first OKRs: www.betterworks.com/okr

Nurture Trust

Trust is a two-way street and requires action from both parties.

Be trustworthy. We can't ever set an expectation for others that we aren't willing to fulfill ourselves. If you want your team to do their best work without supervision, then that is exactly what you need to do. It also helps to prove that you can be trusted to hear and value their opinion, so initiate conversations about trust with your team. Together, set goals and conduct evaluations about consistency, dependability, and accessibility so that you all know what trust looks like at your company.

Trust others. Doubt is poison to trust. If you are skeptical that your team will complete their assignments, or if you fail to ask for their input because you don't think the perspectives of others will be valuable enough, then you are dooming your project to fail before it ever begins. In remote work, it's helpful to maintain an "innocent until proven guilty" stance. Until you have evidence that someone is not meeting their goals (OKRs), that worker (and his or her autonomy) deserves your uninhibited praise, support, and confidence.



Put it into practice

The Powerful Personal Development Plan (PDP)

Trust is a multidimensional concept and it's not as simple as it sounds. Trust is slowly built by a combination of task-based trust (keeping agreements and deadlines) and interpersonal trust (personal connection)³.

Most leaders only focus on task-based trust but neglect interpersonal trust. Good leaders help their employees develop not only professionally, but also personally. To help your team develop personally, use a method like the Swiss Personal Development Plan (PDP) approach. Having a personal development plan helps team members grow in every aspect of their lives.

Evernote evaluates employee engagement with a survey software called Glint (www.glintinc.com). Within a year of introducing the Swiss PDP approach, Evernote Zurich became the highest-scoring Evernote office in terms of employee satisfaction.

See **Appendix 2** for more detailed information on the Swiss PDP approach and what it is.

³ <https://evernote.com/intl/de/virtual-team-management>

Conduct 1-to-1 Meetings

To build trust in a virtual team, make sure you are completely transparent in your communication and set regular meetings with your team. While most leaders conduct frequent structured meetings (e.g. purposeful meetings with a clear agenda such as progress updates or decision-making meetings), they often forget the importance of unstructured meetings (e.g. meetings that have no clear agenda and no specific business topic).

At Evernote, leaders conduct unstructured 1-to-1 meetings every two weeks with all of their direct reports. 1-to-1 meetings help build interpersonal trust. The focus of these meetings may be about business, but it doesn't have to be: it is an opportunity to further your working relationship with your team members and check the pulse of how they are doing both professionally and personally.

Take Your Time and Have Patience

Going remote can be a bit of a shock to the culture and operations of your team. So, take it slow in the beginning. You don't have to eliminate all office spaces immediately or scatter your workforce to virtuality. If you have a small team that is all located in one place, you can start to test whether or not you are ready for a virtual team setup by allowing your team to work from home a few days out of the week. Then, gradually roll out the transition process, working together to adapt processes as they change. By changing in small steps, you limit the risk involved and can still revert to the previous step if things quickly don't go as planned.

Source: www.betterworks.com/okr



Put it into practice

Find a “Challenger”

Find someone who is an experienced virtual team leader and ask this person if he or she is willing to be your mentor to offer you feedback and guidance at regular intervals during your journey. Even simply going for coffee can help.

Remote Work Coaches and Workshops

<https://renow.io/>

<https://www.laurelfarrer.com>

<https://lailavon.com/>

<https://www.collaborationsuperpowers.com/>

<https://www.workplaceless.com/>

<https://remotive.io/community/>

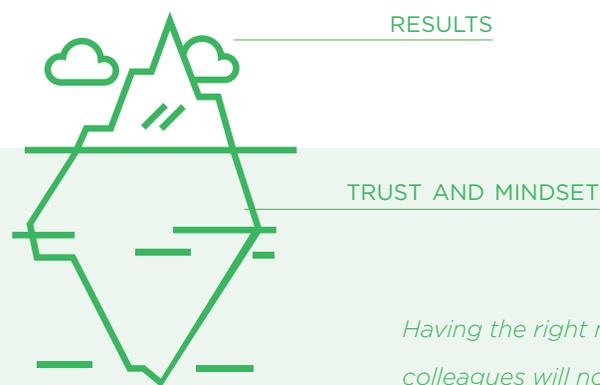
<https://www.yonder.io/events/>

<https://www.virtualnotdistant.com/>

<https://judyrees.co.uk/>

Building a Virtual Team Culture

Culture is a hot topic lately. More and more organizations are understanding the value of strengthening the interactions and expectations of a team. But this team “personality” is not just important for remote teams, it’s crucial. The most common concerns of virtual workers stem from a feeling of lack of appreciation and inclusion. Fortunately, both concerns can be addressed: virtual team leaders need to pay special care and attention to involve their reportees logistically, operationally, and personally. Although your brand’s culture can (and should be) as unique as you are, aim to keep the following in mind as you build your virtual team:



*Having the right mindset and even trusting your colleagues will not give you the results you expect. As the adage goes, **communication is key.***

Develop A Remote Mindset

It doesn't matter whether you are an entrepreneur who is hiring a first employee or an established business owner who wants to expand a centrally located team with a virtual team member. When one person is remote⁴, the whole team has to behave as if they are remote. For a centrally located team with one or two remote members, it may be difficult to adopt this new habit. After all, team members who physically work next to each other are used to having in-person and spontaneous conversations. To prevent isolation of remote team members, make sure to use the same tools, processes, and habits inside the office as you do outside of it. Don't fall into the trap of thinking of long-distance team members as "just" remote employees. Value them just as much as you value colleagues with whom you share your physical workspace or office.



Put it into practice

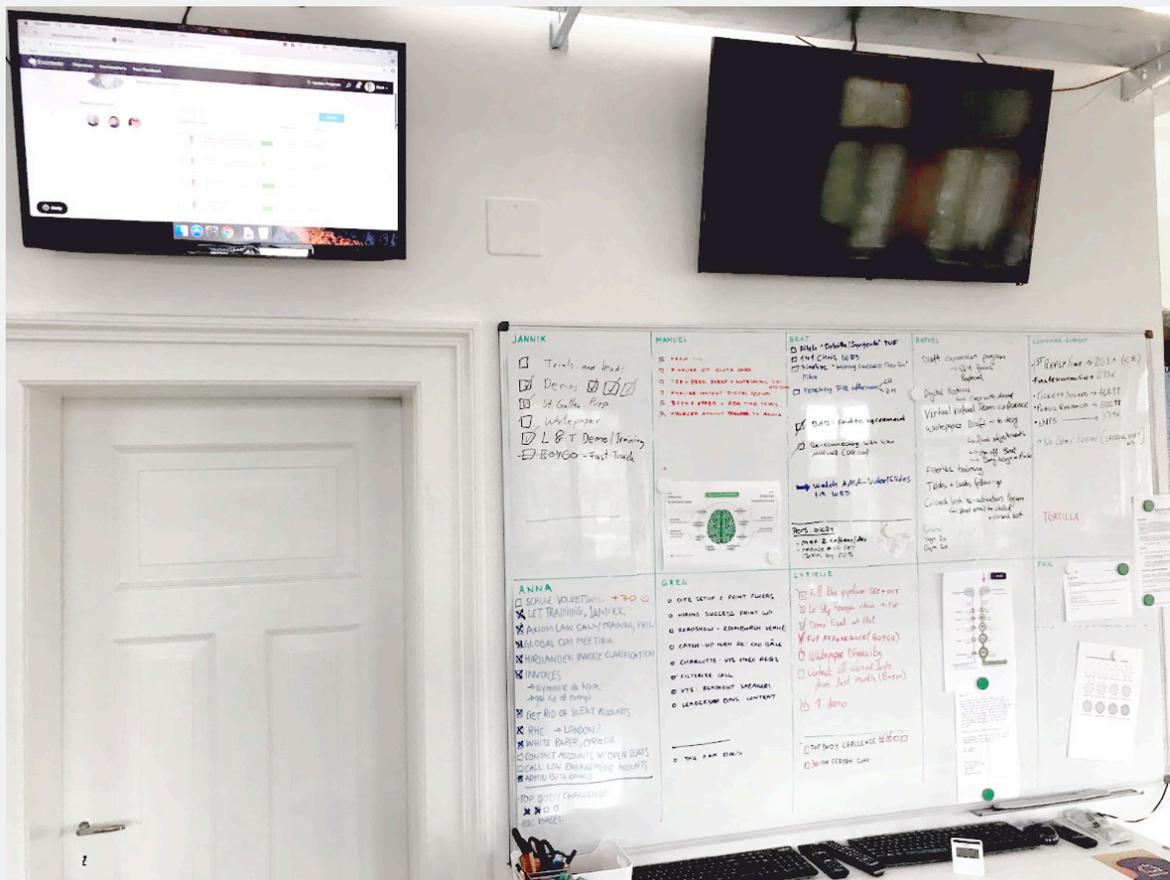
Combine Analog and Digital Experiences

You often hear people say that virtual teams are digital. But are they really? Team members of virtual teams eat and drink analog, they walk and travel analog. Virtual teams are digitized or hybrid, but not fully digital. It's an important fact to remember when working with a fully remote employee: combine analog and digital. Instead of sending a birthday message through instant messaging, send a physical birthday card, a company t-shirt, a company mug, poster, or something else for them to decorate their home office.

Also don't forget to include them in communication that happens analog in your company. Many teams have weekly meetings at the beginning of every week to set priorities and make sure everyone is on the same page. If you and your team have one

⁴ <https://www.collaborationsuperpowers.com/book/>

as well, make sure that remote team members can easily participate. In addition to setting up a dial-in code, try visualizing each team member's to-dos on a whiteboard. At the end of the meeting, snap a picture of the whiteboard that week and put it in your team's central knowledge hub. You may be surprised by the number of people who will benefit from this simple but effective communications tip.



An example of transparency in the Evernote Zurich Office. Company OKRs are displayed on one screen and visible to all employees, and a whiteboard for the team's weekly stand-up meeting also allows team members to connect with each other on tasks and projects.

Drive Results Through Communication

In remote work, over-communication is just communication. So, if you feel like you are communicating too much, you are probably on the right track. Make sure your team understands exactly what you are expecting, how you would like the work done, and what the overall purpose of the company is, then they get to fill in the gaps with their own expertise and surprise you at benchmarks and deadlines with great results.

However, without a coffee machine or conference room around, you'll need to think creatively about how to design opportunities for team members to interact, share information transparently, have opportunities to take responsibility and develop accountability. If you need more frequent and detailed information about project updates, it's up to you to schedule and articulate expectations for a regular standup meeting. If you want your team to bond, you will need to create the channels, parties, and/or retreats for them to casually connect. Designing these rituals can often require much more time and effort than you anticipate, but they are crucial to the success of your team.



Put it into practice

Create a Team Communication Charter

To make sure the entire team agrees on clear communication rules, it's a good idea to implement a Team Communication Charter. Bring your entire team together, virtually or ideally on-site, to brainstorm and decide on clear communication rules and expectations for each channel. After the meeting, write everything down: this will form the basis for your Team Communication Charter—a living document that

is amendable and should be updated on a regular basis. You can find the Evernote Team Communication Charter in appendix 4. Remember to share the charter with new members of your team!

Don't Assume Everyone Has the Same Workplace

Learn the local situation and environment of your virtual team members. Don't assume that others' work environments (e.g. office infrastructure, size, services, etc.) are like yours. Show your office around during virtual meetings: this will further your understanding of your colleague's work life and help you connect and build trust.

Use Decentralized Tools

Technology has contributed significantly to the rise and frequency of remote work. Without the right tools, virtual team members can easily become isolated and disconnected, both from the information that they need to do their job, as well as from the people that are relying on them. If you depend only on general channels of communication like email, your team may spend more time in their inbox than actually working. Instead, invest a solid amount of time and energy in finding tools that are right for you and the projects you need to complete.

As far as equipment is concerned, concepts such as BYOD (bring your own device) and BYOA (bring your own app) are steadily gaining ground⁵, but providing specialized tools and equipment for new hires can give you peace of mind about their ability to be dependable. Whatever tools you choose, remember that “less is more.” Keeping the toolkit minimal will allow your team to spend more time working and less time navigating.

⁵ Bring Your Own: A White Paper on Devices and Applications for Personal and Professional Use.



Put it into practice

Communication Tools

While working environments may differ, it's crucial that every member of your team has access to the same tools and information. We recommend you have at least a tool for:

Knowledge Sharing

This should be the place where you keep your team's collective knowledge. You can set up a central knowledge hub using tools such as Google's G-Drive, Dropbox, Box, or Evernote Business. Whatever tool you use as your knowledge hub, it should be easily searchable as well as shareable.

Collaboration

There are many different ways to collaborate and a plethora of tools out there. Two popular options are Slack for instant messaging and Zoom for online conferencing. Obviously, you can't avoid emails either, but just be sure to set clear expectations on how and when to use email in your Team Communication Charter (see Appendix 4). And when collaborating with others, regardless of written or verbal communication, remember the 3 Ws: *Who does What by When*⁶. The 3 Ws help avoid miscommunication and clearly define who is responsible for move tasks and projects forward.

⁴ <https://evernote.com/intl/de/virtual-team-management>



Creating a Role

You're ready. Your culture is ready. Now it's time to get the role ready. You're all set to scale because you need help, obviously. But if you give a new recruit the instructions to just "help," you're going to have a scattered and reactive employee. Instead, seek to streamline your operations by creating a space for them in the team. Only with a sense of purpose and direction can they contribute to your cause. (Note: If you are more than a one-person show, make sure to include your team in all of the following steps.)

Evaluate Your Needs

As a manager and as a team, you need to decide exactly what is needed in both the short and long term so that you can recruit accordingly. The need to scale probably exists because someone (probably you) has been wearing a lot of hats, so it can be difficult to narrow down which responsibilities need to be offloaded. Consider your own needs, the needs of your team, your project, and your business by asking yourself the following questions:

- Which tasks take up the most time or energy?
- Are there any tasks which someone else could do much faster and/or better?

- Which low-priority tasks are distracting me (and my team) from high-priority projects?

Write a Job Description

Take a look at your responses to your self-evaluation and look for patterns to help you create a job description. Are there certain skills that you realize you and your team are missing? What about tasks? Are there enough “distracting” tasks that can be delegated to a virtual team member? Once you are clear on these questions, the next step is to articulate everything in writing. When creating your job description, be sure to answer these questions:

- What are the goals (OKRs) that will indicate or ensure the tasks are being done well and on-time?
- What tools will be used to complete the tasks, and when should each tool be used?
- How often will the team be gathering to report on progress and share ideas?
- What skills and traits are the highest priority in your team’s culture?
- How does this role contribute to the success of the entire project or the entire company?



Put it into practice

Employ Tech to Write a Good Job Description

A good job description can dramatically increase the quantity and quality of applications you receive. Consider using an HR tool such as Textio, which helps you articulate what you’re looking for when writing a job description while also helping you avoid language biases (e.g. using technical jargon or gender-biased language). Such a

tool can give your application and engagement rates a considerable boost as well as attract a more diversified talent pool.

For more information, visit: <https://textio.ai/how-evernote-attracts-more-qualified-and-diverse-applicants-920758b156ed>

Jobs engage candidates at 3x the average rate

Evernote's spring hiring push coincided with a push for hiring quality job listings



You can find more information on the tech tools that Evernote uses for its hiring process here: <https://www.entrepreneur.com/article/310249>

Source: <https://textio.ai/how-evernote-attracts-more-qualified-and-diverse-applicants-920758b156ed>

Present (and Live) Your Culture

Once you've written down the responsibilities and expectations for this new role, you're almost finished. The next step is to present a clear image of your team's current culture. Record what an average workday looks like, the communication style of your team, priorities and expectations in your work—anything that makes your company unique and will help an outsider know what to expect when working with you. This step might seem unimportant, but it helps attract candidates who have the same priorities as you and your team. It also has the added benefit of reducing your workload in the hiring process, because candidates are also able to decide for themselves whether or not they fit within your company culture.



Finding the Right Match

Without geographic locations limiting your recruiting pool and by offering new employees a flexible work environment, you can afford to be a little pickier with whom you hire. As with any hiring process, be on the lookout for great talent and qualification when screening applicants. However, there are a few points specific to remote working that you'll want to pay close attention to:

- 1. Use remote friendly channels**
- 2. Screen for virtual team skills**
- 3. Conduct a working interview**

Use Remote Friendly Channels

Find virtual employees by utilizing your social media channels, requesting connection referrals from your contacts, and spending some time on job boards uniquely designed for remote roles. Make sure that you are prepared logistically to review more candidates than you might expect—the amount of applicants you might receive may surprise you, as remote working is a trend on the rise.



Put it into practice

Know Where to Look

We recommend starting your search on popular social media platforms such as LinkedIn and Facebook. Besides general job boards (e.g. [Indeed](#), [Monster](#), [Coople](#), [the Muse](#)) you can visit remote-specific job boards and websites. We've gathered an incomplete list for you below:

Remote-Only Job Boards

- [Jobspresso](#)
- [Remote Work Hub](#)
- [Remote.co](#)
- [Remotive](#)
- [Flexjobs](#)
- [Remote OK](#)
- [Working Nomads](#)
- [Staff.com](#)
- [Skip the Drive](#)
- [Virtual Vocation](#)

Freelance and Contractor Websites

- [Upwork](#)
- [Fiverr](#)
- [Toptal](#)
- [Freelance.com](#)
- [Guru](#)

You can find more information on remote-specific job boards here:

<https://www.yonder.io/post/remote-work-job-boards>

Screen for Virtual Team Skills

By nature, virtual collaboration means more limited communication compared to face-to-face collaboration. Non-verbal cues are not as visible, tone is hindered by technology, and there is not as many casual opportunities to get to know the

nuances of someone's personality. But that does not mean that it is impossible for a team to work together long-distance. What it does mean, though, is that it is crucial to recruit virtual team members with whom communication is as easy as possible. Therefore, we recommend screening for specific virtual team skills such as growth mindset, proactivity, dependability, and self-management.



Growth mindset

Skills and talent are just a starting point. Hire people with resilience and passion for learning who work hard to continuously develop their ability. ([See appendix 1](#)).



Proactivity

When it's time for a question or update, can you depend on this person to reach out you instead of waiting helplessly to be checked on?



Dependability

Trust is what makes remote work *work*, so each worker has to be 100% loyal when it comes to all aspects of collaboration, including information, deadlines, and team dynamics.



Self-management

There are only so many reminders and pep talks that you can share online, so staying motivated, paced, and productive will be the responsibility of each individual.

Conduct a Working Interview

Once you have narrowed down applications to a manageable amount, narrow down your pool by mimicking the future collaboration process as much as possible. If you're planning to kickoff projects with a video call, make sure that you conduct at least one interview via a video call to evaluate how well you and each candidate share energy and ideas via webcam. If you want to conduct standups via Skype or in a Slack channel, go ahead and try it out already. For a final interview, it's wise to conduct a small role play or test project to prevent any surprises after a contract is signed.



Put it into practice

Try using the simple approach below to check for virtual team skills:

1. Conduct a phone interview:

Test if the candidate can communicate clearly, concisely, and in a structured way orally.

2. Give questions to be answered by email:

After the phone call, the candidate should answer 2 or 3 questions by email to test whether he or she listened carefully during the phone interview, understood the questions, and can demonstrate good writing skills.

3. Have a follow-up interview via video-conferencing:

Video provides a good opportunity to evaluate charisma and the candidate's non-verbal communication skills.

Conclusion



Congratulations to your first remote team member. Don't forget to properly integrate your new hire in your team with a face-to-face event or at least a virtual get-together. To ensure continued smooth communications between your team members, we also recommend drafting a Team Communications Charter. And remember, next time you're feeling stretched thin with your ever-expanding workload, or the need for new skills arises, it only takes a few steps to recruit the talent that you need to take your work to the next level:

1. **Working in a virtual team requires an adapted approach when it comes to setting expectations and communications.** Not only that: taking the time to build trust and investing in employee development is critical to the success of your virtual team, so make sure that you have updated your frame of mind as a leader. In addition to peer-mentoring and encouragement, make sure you've set up the necessary tools to work virtually, and work to develop a habit of over-communicating rather than under-communicating.
2. **Speaking of over-communication,** your team members need to know exactly how they can help you, and the best way to articulate that is with a well-written job description, complete with details about KPIs, rituals, culture, and role value. Not only for your new virtual employee but also for your existing team members if you have any.
3. **Because remote work includes so much autonomy,** a new set of skills differentiates a really great team member from a really terrible one. In order to be successful, you're going to want to hire team members that are able to demonstrate independent proactivity, unwavering dependability, and self-management.
4. **Trust is truly what makes remote work work,** and thus will be the key to success of your first virtual team. As your team grows, make sure that you eliminate doubt from your culture, always express value to your group members individually and collectively, and set the standard by being trustworthy yourself.

We hope these resources can help you explore your possibilities as a business leader in the future of work. Without the limitations of geographic commutes, expensive office space, and constricting office hours, the ideas and productivity of your company will be as untethered as your team itself.

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Laurel Farrer is a Distributed Operations Consultant that collaborates with the world's top remote-friendly companies to strengthen virtual communication, streamline digital processes, and develop long-distance management strategies. She also writes about remote work for several online publications and education platforms, and advises US branches of government, business conferences, and industry associations on how to share remote work resources with their audiences to stimulate economic growth.



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With the Support of



Nomad City

Nomad City helps mobile professionals stay connected to resources for remote work and to each other. Hosted in Las Palmas de Gran Canaria, Spain, Nomad City is a coworking space and annual conference specially designed for virtual managers in which they can get connected with experienced peers and mentors that perfectly understand the unique demands of flexible leadership.



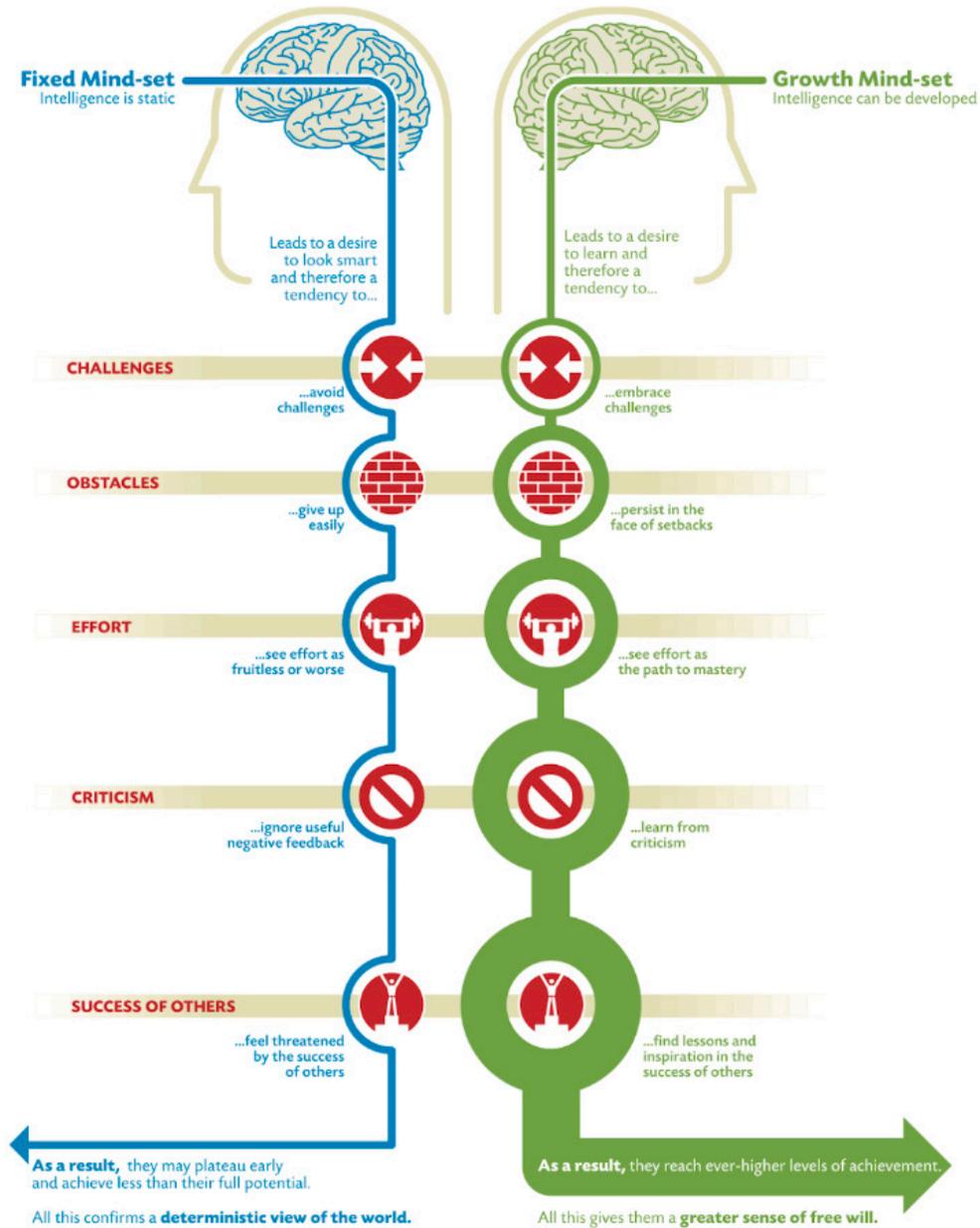
Evernote

Evernote develops products and services that help people to focus on what matters most in a world of increasing information. Evernote provides products where information can be easily captured, automatically organized, and accessed anywhere, any time. The company has changed the way people remember everything, turn ideas into action, and work together. 225 million people around the world use Evernote in 25+ languages.

— Appendices



Appendix 1: Growth Mindset



Source: <https://fs.blog/2015/03/carol-dweck-mindset/>

Appendix 3: Team Communication Charter

INTRO

Based on our joint workshop (Dec 5th 2017), we mutually agreed upon the following communication rules, expectations and best practices. Of course, we can review them if something does not seem to work as expected.

Calendar Hygiene and Expectations:

- We do reply to **calendar invitations** (within 12h - 24h)
- We **add travel time** from and to an external meeting. We also add further travel info (e.g. if it's a plane or train)
- We make our **calendars public** (booking meetings is much easier for everyone - easy to understand if a meeting can be postponed or not)
- We add a **video conference link** to every meeting with remote participants (highfive)
- We reserve the room for any video conference or meeting
- We add our vacations or holidays into the ZH event calendar as following: "Name" vacation (# of days)

Email Hygiene and Expectations:

- First **think** if email is needed, then **talk** before email is sent, then send email if needed
- Let's **not discuss** via email.
- The email channel is **not urgent**: 12h - 24h response time is ok (no need to always have the email open)
=> for **truly** urgent or critical things, we **call** each other (cell phone), also late or on weekends
- As email is not urgent, no need to reply to emails **after 19h and during weekends**
- No need to check emails **during vacation** (unless otherwise agreed upon). => see next line
- We all have **decent OOO replies**: including return date from OOO / back-up contact and details / back-up person gets a briefing
- **Being brief** in email amongst ourselves is ok (even a title email ending with "... EOM" is ok and not rude)
- No need to reply to an **FYI email** (e.g. saying thanks) - you can, but don't have to
- **No scrolling** in emails - that's a sign that the email is toooooo long... 😊 => talk first!

Office Hours

- Overall objective: achieving our goals but also balancing work & private life in a meaningful way
- However, also taking team spirit, team efficiency and feeling of togetherness into account: we are in the office when possible (default)
- Make sure your calendar is up-to-date and shared/public so we know how to reach someone if urgent

Home Office

- Overall objective: achieving our goals but also balancing work & private life in a meaningful way
- *Home Office is possible as long as it makes sense for you, your team and the company.
- *When planning to do Home Office, we inform team members and the manager beforehand, and add it to the calendar.
- *Home Office is work.

Meetings in General

- We come prepared to meetings - if not, we tell others (and if needed, reschedule the meeting)
- **3W rule**: Meeting follow-up actions and/or meeting summaries must contain the three Ws:
WHO does WHAT by WHEN
- The **meeting organiser** is **responsible** for a) taking notes and b) that follow-up actions (acc. to 3W rule) are written down and shared
- Meetings start on time and stop on time
- Make sure you leave the meeting room clean - no bottles, no dishes, rearrange things such as keyboard, chairs, mouse, pens, etc.

Slack Hygiene

- *We add OOO status in Slack (after the family name)
- *The EMEA BIZ Team is our official information channel
- *No instant reply required. Our communication priority order is: 1) Call/Text 2) Slack 3) Email

Source: <https://evernote.com/intl/de/virtual-team-management>

