



Mastering Technical Sales

2037 Trowbridge Drive

Newtown, PA 18940

Phone +1-215-431-1552

John@masteringtechnicalsales.com

www.masteringtechnicalsales.com

John Care, Managing Director

Are You Managing Or Leading Your Remote Employees?

Using Your Brain Instead of Your Eyeballs

The past ten years have seen a major trend towards telecommuting and home office employees for both financial and environmental reasons. Managing some, or all, of your team from a distance is now rapidly becoming a required skill for a leadership role. It is very common for sales and presales organizations to be virtual and remote - you may be even a remote employee yourself. So what are the keys to not just managing, but leading, your remote team? To get to the nuts and bolts of the question, how do you lift your team to 100% productivity and make sure they stay at that level?

Elite level athletes are familiar with the "beep test", which objectively measures their fitness to compete and their oxygen capacity levels. To measure your fitness as a remote leader, we recommend you follow the management BEEP philosophy:

- **B**uild Relationships
- **E**mpower Employees
- **E**xpectation Setting
- **P**erformance Measurement

Build Relationships

Communications and distance are the two biggest challenges to remote leadership. It is tough to build and develop relationships with remote employees, and to foster a sense of teamwork, solely over the telephone. Obviously when you do get the opportunity to visit with them you should plan your time to include formal work-related and informal personal time. The secret is to take those skills which make for good local management, and apply them even more rigorously with distant employees.

1. **Be conscious of personalities.** How do you know if your employee is rolling his eyes at you or impatiently tapping her fingers when you are on the phone? When

possible, use a team meeting to conduct a personality test session. Failing that, I always ask if a direct has a Myers-Briggs or DISC profile they can share with me, and I do likewise. Some employees have a "get on with it" type attitude, while others like to spend the first ten minutes of a call discussing the game and their children's latest achievements. Learn the difference. I'd also suggest you learn the names of spouses, children and significant others and include them in any special recognition of the employee. A \$100 gift card sent directly to a spouse can have a wonderful motivating effect.

2. **Master all of your communication tools.** Without face-to-face contact, you are mostly limited to telephone, email and IM technologies - although some enterprising companies now encourage the use of webcams. The general rule of thumb is "*if in doubt, pick up the phone*". Email is useful for mass discussions and general purpose information dissemination while IM serves a useful purpose for small clarifications and rapid single-purpose information transmission. Don't overdo email - see the September 2007 Talking Points document!
3. **Hold regular 1-2-1's.** Set up a regular and formal schedule of meetings with each of your direct reports. These may vary from twice a week to twice a month and serve as both a regular reminder and a form of safety net if all else fails. Agree upon a time that is convenient for both of you and unlikely to conflict with sales calls or customer priorities. It may sound corny and contrived, but try having a picture of the employee in front of you for the sessions if you are having communication troubles.
4. **Build the team as well.** You need to foster teamwork and communications between your team, without your being present. Many organizations set up websites, wikis or collaboration sites to post pictures and create a sense of community. You can also ask a different member of the team to lead a weekly or bi-weekly call and rotate responsibilities around the team. Also consider setting up a "road trip" every 2-3 months to visit remote employees and offices.

Empower Employees

Having remote employees involves a strong degree of trust - are they really working or are they out playing golf? What happens to the time before and after sales calls? One advantage of scheduling 1-2-1's and setting clear definable objectives is that it becomes difficult to "hide" non-performance.

1. **Schedule management.** Micro-managing the schedule of a remote employee may work for a standard desk job, but not for a sales engineer. In fact, it is a losing proposition on both sides. The preferred technique is "managing around the edges", which involves helping the employee prioritize his tasks and eliminating time-wasting distractions. Most SFA systems now allow the scheduling of presales personnel and recording time spent against accounts, or preferably opportunities, so these reports prove very useful to managers.
2. **Encourage the self-starter.** Encourage remote employees to take the initiative and become self-starters. Assign new hires a mentor from your team (a useful leadership skill for them to learn) in addition to whatever help you can provide. Rookie remote employees will make some mistakes as they learn the organization, policies, politics and the sales process. It is your job to minimize these and ensure they turn into learning experiences as having an employee who sits at home until they are told to do something is counter-productive
3. **The work-life boundary.** Be conscious of the limits of the agreed-upon workday and stay aware of time zone differences. Your employees will be watching you, so if you work 12 hour days and send out copious email over the weekend you may be unintentionally setting a standard for them. In fact you should be actively checking the hours worked and monitoring for burnout or poor prioritization.

Expectation Setting

As a leader of remote at-home employees you never want to hear the phrase "*I thought you meant..*". Although communication is a two-way affair, it is your responsibility to ensure that you clearly communicate, and receive conformation of, any and all expectations you have as to the general tasks and duties of the position. It is, after all, a privilege to work out of your house instead of being asked to visit an office every day.

1. **Exactly what are you expecting?** Be very clear as to your expectations for standard working hours, availability by cell phone, email response requirements, IM usage and office equipment. Expense policy needs to be carefully detailed, especially any exceptions or gray areas.
2. **Taking care of the details.** Administration and bureaucracy still have their places within the company. One of the first signs of a problem is when status reports,

expenses, timesheets or CRM updates start to slip. Set firm deadlines as to when these need to get completed and submitted.

3. **Multiple sources.** Inform the employee that they will not be the single source of information as to their schedule, performance and achievements. You will be asking their peers, sales representatives and potentially even customers about their performance, attitude and availability. Within a remote organization you may have to perform this task by phone instead of by the coffee machine - but it needs to be done.

Performance Measurement

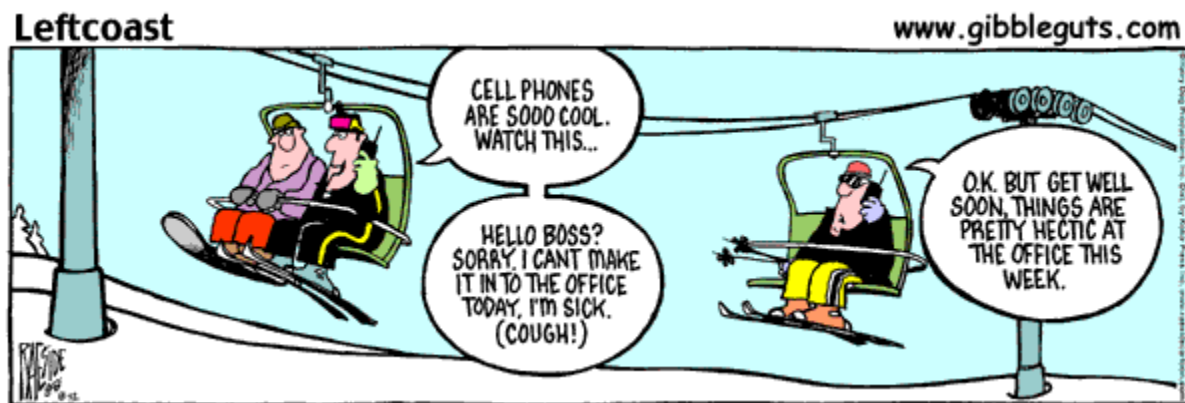
Setting performance metrics for remote personnel often brings about the realization that metrics for in-office staff are not always quantitative and accurate. Hours spent at a desk, or email generation, are poor indicators of performance, as employees who work in the same space as their managers learn to create the appearance of productivity.

1. **Setting clear objectives.** Make sure the objectives are measurable, meaningful, and roll-up towards your entire team goals. Revenue generated, references obtained, training days, industry certifications, RFP response times and win rates are all measurable metrics. Whatever quantifiable expectations you have set (expense submission, CRM updates) also need to be included in the objectives. Document the objectives; make them part of an annual performance plan, and even part of variable compensation to drive the correct behavior.
2. **Feedback and coaching.** As a leader you lose the opportunity to provide informal coaching and feedback over a cup of coffee at the cafeteria, so look for "teachable moments". Constantly provide feedback (both positive and adjustive) and look for new projects or opportunities that may serve to teach an employee a new skill or strengthen an existing talent. If a sales call or a demo goes bad, don't shy away from the issue, drill down into it and consider it a teachable moment. Just make sure you have the details and don't run an interrogation in front of others.
3. **Constant evaluation.** The old truism about "*nothing you say in a performance review should ever be a surprise to the employee*" rings completely true in a remote situation. Just do it so your employee feels connected and that you care for him/her. You don't want any surprises either.

4. **Recognizing problems early.** Never assume a problem will go away if you give it time and ignore it. Being late for sales calls, missing conference calls, poorly prepared demonstrations are all indicators of a deeper problem. There may be personal issues with the employee, conflicting priorities, a lack of skills and training - or the employee may, after all, just be unmotivated. Should you suspect something deeper going on then document your concerns and conversations and immediately involve your local Human Resources officer.

Summary

Being able to lead, not just manage, a remote team is a great skill to have on your resume and will stand you in good stead for future positions. You learn to be very clear and precise in your communications, plus you gain the benefit of managing to results and outcomes and trusting your brain over your eyes when dealing with your team. Your organization will gain happier and more productive employeesⁱ, which will translate into happier customers and increased revenue. So just remember to run the BEEP test at least once a week!



Talking Points is a monthly column authored by John Care, Managing Director of Mastering Technical Sales. For more information on this and other Sales Engineering topics visit the website at www.masteringtechnicalsales.com.

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ⁱ Washington State University Energy Program Study, 2006. Employees had better morale (79%), increased productivity (72%) and could better handle work/family issues (72%).