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Leading and managing when working remotely

CXO Document

March 2020



Context & objectives

Context

The COVID-19 emergency has forced thousands of organizations and millions of employees into remote working models, as lockdown is enforced around the world

For organizations and individuals accustomed to working in the same location, this situation presents uncharted territory and new challenges - many leaders are managing distributed teams for the first time, and individuals are navigating the realities of working from home that include sharing home-office spaces, juggling childcare responsibilities and dealing with feelings of isolation

Challenges aside, the shift to remote working offers a unique opportunity to reset working norms and rethink how best to engage and empower employees. Without the spontaneity of ad-hoc/informal in-person reactions, and serendipitous hallway conversations, leaders need to be more intentional and purposeful about their interactions with their teams

Key objectives of the document

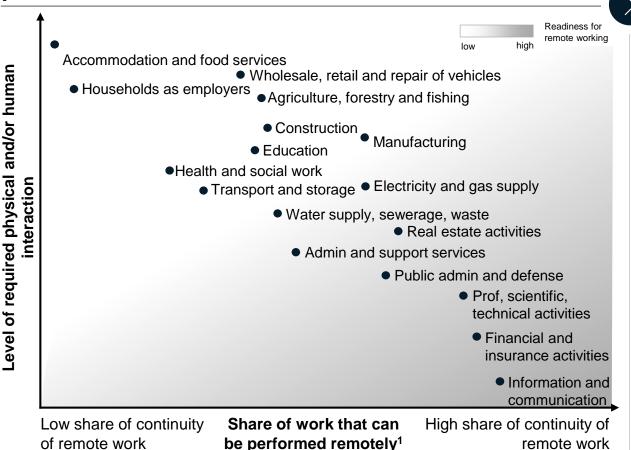
In this document we offer tactical approaches to the most common challenges in **leading and managing in a remote environment.** These apply both to a short-term response and longer-term operating model shifts. The approaches include:

- Increasing team cohesion and interpersonal bonding
- Creating clarity in roles, structures, and outcomes
- Driving effective daily processes to keep productivity moving
- Using the right tools for staying connected and productive, from a distance

Through these topics we explore ways to navigate the unprecedented challenges, and make the most of the unique opportunities of working remotely to rethink how work gets done

Remote working has accelerated, particularly in sectors that are more 'ready' – this shift is likely to continue to the next normal

Remote working readiness for different professions...



... is likely to accelerate due to the crisis, as evidenced by trends from China²

- At the height of the crisis in China ~25% of the population was working remotely, dramatically different from the c. 5% of the US population working remotely in 2018
- Following the experience, Leaders in China have said ~20% of work that was not previously remote should be done remotely going forward
- We see a substantial shift initially within the industries that are more 'ready' for remote working but expanding to other industries and occupations as new solutions are found

[.] Based on UK dataset cross referenced against data from McKinsey Global Institute

Based on McKinsey survey with 1300 respondents across industries in China

To make this shift, organizations must overcome common challenges across structure, process, people and technology

		Common challenges
000	People	Less daily direction and clarity can lead to misunderstanding and be demoralizing
т "П "П		Lack of impromptu interactions makes it harder to build rapport and community
		Isolation may lead to less team cohesion
		Blending work and home, especially in insecure times, can lead to challenges in balancing personal and professional lives
П	Structure	Any lack of clarity (e.g., roles, decision rights, governance) is amplified
		Difficulty in navigating organization (e.g., finding project supporters or navigating internal politics)
		Decision making channels are disturbed
77	Process	Lower communications efficiency and associated greater difficulty in making decisions
		Difficulty in self-organizing to address real-time challenges
		Risk of overlooking dependencies and creating island solutions
	Technology	Missing or unfamiliar tools
		Security vs. speed tradeoffs can lead to insecure workarounds

8 actions form the backbone of successful remote working models



People

- 1 Instill an inclusive, caring culture
- 2 Learn to lead not micromanage from afar



Structure

3 Design a simple, effective, outcome-oriented structure



Process

- 4 Define the new routine and norms
- **5** Focus on high-quality interactions
- 6 Create a widely accessible "single source of truth"



Technology

- Use the right technology for the problem
- 8 Ensure secure remote working



1 People - Instill an inclusive, caring culture



Get to know each other

Schedule kick offs/ introductions when new teams come together and take time early on to align on team identity, values and norms

Dedicate time to share more about yourself and be inclusive in inviting others to do so; solidarity matters (e.g., show your home, introduce people in your life, share an item that is important to you)



Really checkin with people

Plan one-on-one team catch ups to check in on status of work and on them as people

Allow and plan for more time on calls for customers and team members to open up and share how they are really feeling

Conduct weekly **round robin check-ins with the team** – each person can divulge how they are feeling, physically, emotionally and intellectually



Accommodate new needs

Acknowledge the situation. Ask leaders to share potential distractions, what the team should work around, and where they need to be fully present

Accommodate needs for gaps created by COVID-19 (e.g., childcare, eldercare, etc.) where possible. For example, schedule 5-10 min gaps between calls to respond to children / others before next call



Celebrate

Create outlet to share best practices and success stories to create a sense of community and support (e.g., blog, newsletter)

Encourage team members to recognize and call out achievements

Be intentional about how you build a one-team identify and culture with inclusiveness at its core

Make the most of the unique window into the experiences of others to make people feel seen and known

Work with your teams to accommodate the pressures from work and home, creating an ecosystem where people are cared for

Recognize the silver lining and celebrate achievements

1 People - Instill an inclusive, caring culture

Employee wellbeing is particularly important in the current situation across mind, body and purpose

Increase resilience, emotional flexibility and ability to focus on work and private life

This includes, but is not limited to

- Practicing mindfulness and meditation
- Creating space for personal renewal and connection

Stay in touch with your loved ones and develop a deep sense of connection to your community by making valuable contributions to it

Sleep sufficiently to restore the mind and body, and support mood, energy and cognitive abilities

Take regular **physical exercise** and **eat healthily** (quantity and variety)

Support each other within and beyond work, being compassionate and of service, helping without expecting anything in return

Current uncertainty and media buzz, combined with the shift to remote working, can create challenges in each of these dimensions requiring employers to help staff create healthy habits

PURPOSE

2 People - Learn to lead — not micromanage — from afar



Set direction

Define success: Set clear, transparent objectives and goals, and roles for teams and members

Create space to clarify goals and redirect: Thoughtfully increase the level of communication compared to working on site to ensure alignment but never "meet to meet", i.e., have weekly or even daily check-ins

Contextualize expectations: Build in thoughtful opportunities for growth



Empower the team

Establish psychological safety: Lead with vulnerability, empathy, curiosity and transparency i.e., share more about yourself, including highs and lows

Link work to impact: Communicate to the team how their work connects to the objectives of the team

Delegate decision-making power: Empower the team to make decisions wherever possible, including team events

Replicate in-person team setting whenever possible: Use tools to help you create virtual whiteboards, cameras to have face-face conversations, etc.



Connect the dots as a servant leader

Create links: Maintain the inventory of all progress and interdependencies, and connect necessary people to solve problems together

Proactively debottleneck: Engage frequently to understand roadblocks and progress, and be in problem-solving mode to provide value

Embrace continuous improvement: Promote it as a team priority

Select examples

Leading digital insurance company

Rapidly launched COVID-19 insurance products through remote teams working over Chinese New Year holidays

Global professional services organization

Adapted policies to support the reality of new work – (e.g., family obligations, healthy working practices)

3 Structure - Design a simple, effective, outcome-oriented structure

Focus on small cross-functional teams to get work done while minimizing need for communication

Illustrative

Principles of small cross-functional team setup



Status Quo: Large team of 20 people



Remote work set up: Small cross-functional team setup¹

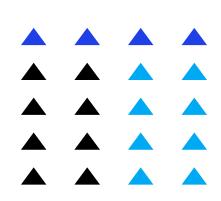
Define clear, measurable business objectives that focus on the 'here and now'

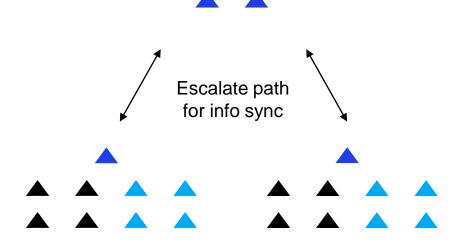
Set a small team size: no less than 5 no more than 9

Minimize dependency on the other teams

Have all competences necessary to complete work in the team

Rigorously define any roles you create





Role 2 A Role 1

Team Lead

Cross-functional teams should ideally have fewer than eight members, but no more than nine total.

3 Structure - Design a simple, effective, outcome-oriented structure

Invest in defining how your organization will continue to make critical business decisions

- Clearly identify final decision rights (individual vs. committee)
- Ensure a high level of alignment and open dialogue the quality of debate really matters
- Guard against bias
- Onn't do it all in one meeting use stage gates to go faster
- Don't get hung up—bring relevant facts and analysis to the table, but only focus on facts that matter
- Empower employees to make decisions by regularly verbally confirming their role
- Coach employees to involve only decision-critical people
- Widely share organization-wide and unit-specific strategic objectives and performance data to support decision making
- Encourage people to be fact-based, but supplement with intuition
- Don't spend time on these decisions, even when asked
- Don't punish employees for wrong decisions that only encourages approval seeking

Big-bet decisions

with major consequences for the company, often involving situations with unclear right or wrong choices

How they're made: By an individual or small group of executives over video

Scope

and impact

Ad hoc decisions that arise episodically; impact on broader organization depends upon how concentrated they are

How they're made: By a person who has been given decision authority

Unfamiliar, infrequent

Cross-cutting decisions that are frequent and require broad collaboration across organizational boundaries

How they're made: Through a series of decisions made by different groups as part of a collaborative effort

Delegated decisions that can be assigned to individual primarily accountable or to a

working team

How they're made: By an individual leader or an existing natural working team, could also be automated!

Familiar, frequent

Level of familiarity

- Use opportunity to map key decision process
- Establish clear **governance**
- Create shared objectives, metrics and targets for collaboration
- Build capabilities (e.g., feedback loops, dry run the process)
- Don't underestimate talent get the right people involved
- Don't leave escalation to discretion make **escalation points** clear
- Delegate authority and accountability to the lowest level
- Transparently communicate who owns delegated decision rights and accountability
- Upskill decision makers (e.g., analytics, problem solving approaches)
- **Train leaders** to coach decision makers (e.g., probing questions), rather than direct what they should do
- Define the boundaries of delegation, clarifying resources and decisions not under remit of decision maker
- Don't engage in the decision, unless 1) it exceeds risk or value of **impact threshold**, 2) you are coaching on decision process
- Don't intervene if it's not the decision you would make that's not delegation

that's not delegation

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3 Structure - Design a simple, effective, outcome-oriented structure

Objectives & key results (OKRs) can effectively set and communicate goals and outcomes pursued by teams

	What it is	Business examples
KPI	Holistic and fixed list of measures of success we know we need to meet day-in, day-out	Revenue OPEX Utilization Headcount
OKR	A bold Objective set to achieve a step-change in performance, touching one or more KPIs. Backed up by trackable Key Results (leading and lagging)	"Reduce 20k annual contact center calls via digital adoption" "Launch new product X to increase revenue by 20%"



- Link results & outcomes
- Be bold: do not expect to complete every KR each period (60-70% completion is considered full attainment)
- Be public and visible, and drive daily ToDo's and working priorities
- Be a consistent practice for everyone and aligned throughout organization
- Cascaded to each individual level to be very clear on what an employee is focusing on and how they can work together



In a remote model particularly...

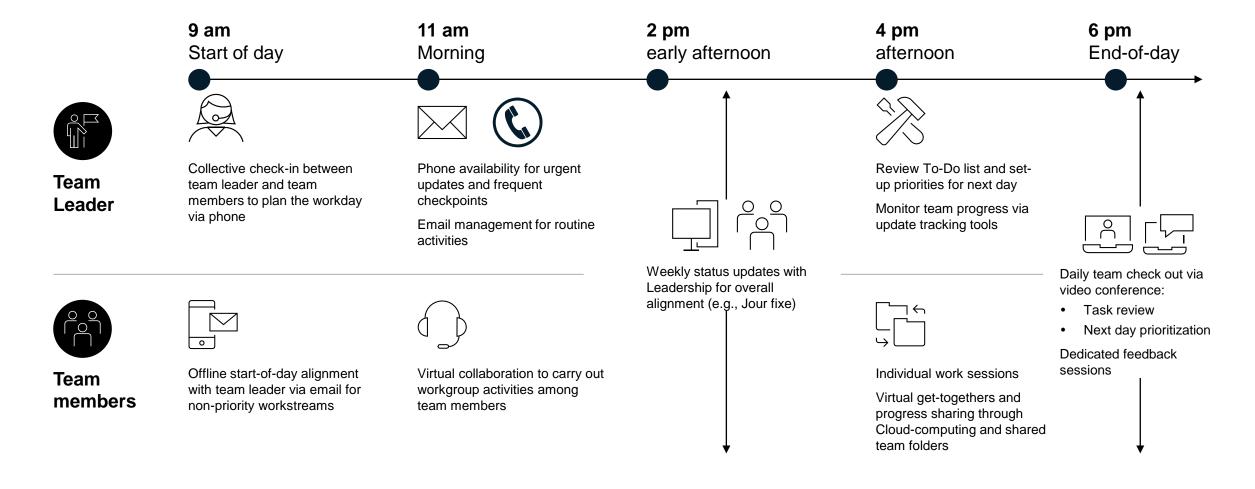
- An **initial adjustment** of KPIs and OKRs may be caused by the underlying reasons for a **shift to remote work**
- OKRs for teams need to be easily understood and understandable through a common single source of truth
- OKRs should be public and visible across teams in a digital tool that is easily accessible to everyone
- OKRs should be regularly and jointly **reviewed** with the **team and leadership**



4 Process - Define the new routine and norms

Establish a clear cadence of pre-scheduled daily and weekly team meetings

Illustrative



4

Process - Define the new routine and norms

Having personal structure and process is as important as team and organizational structure

Actively manage the day

Put a premium on personal productivity and set up for it (e.g., be on time and be present)

Manage time, e.g., be clear on what's important vs urgent and block time for focused work (e.g., set clear agendas & outcomes)

Be part of the team

Engage actively and constructively in social interactions (e.g., assume best intentions, plug others in and connect)

Bring 'confident realism' to work on what can be achieved

Take on continuous improvement as a team effort

Bring a growth mindset

Contextualize goals and propose how to best contribute (e.g., volunteer for responsibility)

Assess the needs for personal development and take action

Recharge (e.g., communicate preferences, block personal time)

Moments that matter when working remotely



Settle into a new rhythm

Create a home office or separate workspace and create new routines to start and end the day



Set clear goals

Define your daily and weekly goals and share them with your manager and team



Stay in touch

Maintain connections with colleagues over virtual coffees, happy hours or walks



Communicate proactively

Be visible and explicit about your availability and priorities



Invest in your own development

Sign up for e-learning, volunteer to lead a new project, find a way to grow



Make time for yourself

Take time to re-charge your batteries, eat a meal away from your desk, go for a walk, meditate, or call a loved one

5 Process - Focus on high-quality interactions

Optimize communication channels for purpose, don't use VC for everything

1:1 Call / VC Individual catch-ups and building relationships Discussing sensitive and difficult topics Video conference Problem solving and co-creation using shared screen or whiteboard Weekly planning and review sessions Decision meetings Workshops and trainings Team talks and retrospectives Chat Process syndication Urgent questions and seeking guidance 'Bursty communication' for keeping up to date in real-time Social team talk Video captures & voice notes Showcasing and explaining work Guidance to the team from managers with limited time Debriefs after meetings that some may have missed Updates and status to large groups of people Formal communication inside and outside the company	Channel		Best for	
Chat Process syndication Urgent questions and seeking guidance 'Bursty communication' for keeping up to date in real-time Social team talk Video captures & voice notes Phocess syndication Urgent questions and seeking guidance 'Bursty communication' for keeping up to date in real-time Social team talk Updates and explaining work Guidance to the team from managers with limited time Debriefs after meetings that some may have missed Updates and status to large groups of people	63	1:1 Call / VC	·	
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Villan	<u>Q</u>	•	Guidance to the team from managers with limited time	
		eMail		

Communication considerations

Time to create vs time to process information

Synchronous vs Asynchronous

1:1, 1:N, or N:N

Structured vs stream

Formal vs chatty

Urgent vs important

Visual vs spoken vs written vs non-verbal clues

6 Process - Create a widely accessible "single source of truth"

Progress

Align priorities and owners in weekly planning session, and list in digital dashboard tool

Maintain a backlog that can be continuously prioritized

Update progress on priorities in daily and weekly check-ins to enhance efficiency, gather clarity on overall progress, surface and remove blockers

Use to proactively share updates with leaders and the team

Content

Establish well-organized folder structure: Well-organized content folder is pre-created; same structure is constantly maintained and reviewed

Define owners to ensure version control on key files

Clarify file-naming convention so it is easy to find the right version, right content

Value to team

Create transparency so everyone knows what's going on and where the goals & priorities are

Communicate proactively – e.g., to managers on progress, colleagues not joining key meetings on outcomes, other workstreams where help will be required

Manage version control and final deliverables

7

Technology - Use the right technology for the problem

A variety of digital tools are available to address specific collaboration needs

Examples, not exhaustive

Content creation





★ Confluence

Joint document creation
Live co-editing
Joint white-boarding
Central knowledge space

Video conferencing





Problem solving and cocreation using shared screen or whiteboard

Weekly planning and review sessions

Decision meetings

Workshops and trainings

Document sharing



Dropbox Business



Sharing files and documents

Structured repository of information

Version control management

Access across organizations

Channel-based communication¹









Process syndication

Urgent questions and seeking guidance

Keeping up to date in real-time

Social team talk

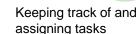
Stream-based repository of knowledge

Task management









Backlog prioritization

Performance management

Project management

Checklists

Single source of status

Polling





Interactive presentations

Retrospectives and team learnings

Interactive Q&A

Engagement

Polls

Many tools can be integrated with each other through single sign-on and content sync Choosing the right tools for the company requires close collaboration between Business, IT & Security Never launch tools without appropriate training

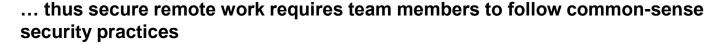
^{1.} Chat software (e.g., WhatsApp, WeChat, Line) lack security and therefore should be used only for non-confidential chats, i.e., coordination /logistics

8 Technology - Ensure secure remote working

Secure remote work requires team members to follow common sense security practices

Working from home has opened multiple vectors for cyber attacks...

- Work-from-home arrangements amplify long-standing cybersecurity challenges:
 - Poorly patched applications and infrastructures
 - Insecure remote access and filesharing without VPN and MFA
 - Security monitoring focused on central systems
- The human being remains the weakest link:
 - Physical and psychological stressors compel employees to bypass controls
 - Absence of 'Human Firewall' that encourages risk-mitigating behaviours



Online	Use approved tools and share only intended materials Mute notifications from communications tools		
collaboration			
	Use enterprise solutions where possible to ensure adequate data protection		
Working in public	Use secure Wi-Fi whenever possible and always use VPN		
areas	Protect confidential information by using screen protectors and conduct phone calls in private		
	Do not leave your computer or phone unattended and always lock them when not in use		
Document	Use approved document-sharing tools and check access lists		
sharing	Encrypt files when in doubt		
	Review emails and documents for professionalism		
Using business partner's tools	Obtain explicit internal permission for installation and use of any business partner's tools		
	Only access from their office network or if they are SaaS-based (e.g., Salesforce.com)		
	Set up strong passwords and appropriate log-in mechanisms (e.g., security tokens)		

8 Technology - Ensure secure remote working

CISOs need to secure at-scale work from home through targeted initiatives

CISOs should launch targeted initiatives covering 3 areas

People



- Over-communicate cyber awareness, again and again
- Launch cyber-security awareness programs at scale
- Enable rather than prevent work-from-home productivity
- Focus on positive awareness (e.g., awards for most reported phishing attempts)

Technology



- Adopt a 2-tier approach focused on:
 - ✓ Accelerating cloud migration of as many applications as possible¹
 - ✓ This in turn, frees up resources to secure the most critical 'crown jewels' of your organization
- Enable every single employee to work remotely by deploying core applications and tools (VPN, collaboration tools, filesharing, etc.)

Processes



- It is critical for CISOs to focus on 4 process areas:
 - ✓ User support
 - Application of critical patches
 - Incident response readiness
 - Business continuity readiness of security vendors

in alignment with local regulations

Appendix

Case studies of companies who have effectively made the shift

Lessons from China – some counter intuitive takeaways

Example approaches

The application of remote working levers should be tailored on the basis of the Department, evaluating the dimensions that facilitate it based on the type of work performed

Case example 1 – application of remote working levers in the Banking industry

Department	Dimensions that facilitate remote working adoption Evaluation of key dimensions per Department/activity, e.g.,	
Macro-categories of the main Departments of the Bank:		
Central functions, e.g.,HR/Organization	Level of human	Limited client-facing interactions
 Risk Management Credit Finance Marketing Legal/Compliance 	interaction	Few project-related activities (including Agile settings)
Degal/ComplianceOperationsIT	Level of system readiness	No access to critical data and systems,
 Distribution network, e.g.: Commercial coordination and product experts Private/Corporate centers 	readiness	usually not accessible from remote (e.g., lending, mission critical applications)
Commercial roles (outside branches)Retail branches		Paper-less culture and approach

Case example 1 – Clustering of main Banking Departments based on specific needs and degree of applicability of remote working

ILLUSTRATIVE X Generally not applicable Generally applicable Detailed next Degree of applicability of Sample split per Department Dimensions that facilitate remote working adoption remote working Level of system readiness Level of human interaction Overall Bank FTE % Limited client-No access to Paper-less facing Few projectcritical data and culture and related activities systems approach interactions 100% <5% High HR/Organization <5% Risk management Legal framework and auidelines <5% Credit Central High 5% Contact Center **functions** Finance and other 5% support functions¹ **Tactical solutions** 5% Operations Digital tools/norms & 5-10% technology adjustments Commercial coordination <5% and product experts Digital tools/norms Commercial roles 5-10% **Distribution** (outside branches)² network 5-10% Private/Corporate centers Different processes/ 50-60% service model Retail branches

¹ E.g., Marketing, Legal, Compliance 2 E.g., agents, financial advisors

Case example 1 –Remote working levers to apply

Sample split per Department		Degree of applicability of remote working Examples of potential initiatives/levers for remote working			
	HR/Organization	High	• -	 5	
	Risk management	_ Legal framework	 New internal legal framework and guidelines on remote access to critical data (e.g., no printing, privacy screen always on) 		
Central	Credit	and guidelines	 Adoption of temporary solutions to overcome the need of non- digital processes in accordance to the abovementioned policies 		
functions	Contact Center	High ■ -			
	Finance and other support functions ¹	Tactical solutions	 Adoption of temporary solutions to overcome the need of non-digital processes (e.g., scanning documents, using offline excels), to be later standardized in a "Next Normal" 	Adoption of tech equipment/tools and communication channels to enable remote working (e.g., mobile phone, PC, videoconference tools VPN access, data sim	
	Operations		configuration with digitization		
	IT	Digital tools/norms & technology adjustments	 Weekly sprint plans and daily cadence Widely accessible "Single source of truth" Secure connections to critical applications 		
	Commercial coordination and product experts	Digital tools/norms	 Weekly sprint plans and daily cadence Remote Agile guidelines, digital team rooms 		
Distribution	Commercial roles (outside branches) ²	Digital tools/norms	 More frequent interactions with clients thanks to digital tools/VCs 	-	
network	Private/Corporate centers	Different processes/	 Shift to a new digital way of interaction with customers, requiring deep changes in the client service model and in the 		
	Retail branches	service model	processes, e.g. remote chat integrated in the Internet Banking to allow branch managers to talk to customers	↓	
	Most leve		allow branch managers to talk to customers m, some others need to be deployed over time to revamp ne situation to possibly establish a "Next Normal"		

¹ E.g., Marketing, Legal, Compliance 2 E.g., agents, financial advisors

Case example 2 – How a leading global technology company established an efficient remote working environment

People OOO	Set cultural norms to be respectful and understanding Avoid calendar double-bookings and leave buffer	Tag people if inputs needed Schedule emails to send in morning to respect downtime
Structure	Set up "virtual" cross-functional teams no larger than 10-20 members with product-oriented focus that have P&L responsibilities Assign key people to have both functional / BU roles	Allow high degree of autonomy in decision making with collaboration across BUs Adopt OKRs instead of KPIs – people set goals for themselves rather than top-down
Process	Set up clear cadence of weekly meetings for reviews and decision making Define clear escalation paths	Collaborate seamlessly by working together on single digital source of truth with version control built-in Leverage result-oriented performance management at all levels
Technology	Adopt leading video conference software with modes for large and small groups (which are automatic), auto close captioning, multiple options for screen sharing Allow different "rights" settings for files and folders (i.e., viewer, editor, etc.)	Offer data management tools to enable migration and management of enterprise data remotely with security, reliability, and high availability Offer cloud solution tools across data management, smart BI analysis, and collaborations