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Holding Employees Accountable in Remote & Hybrid Work Environments

Crews & Co.

COMMONWEALTH PAYROLL & HR

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Holding Employees Accountable in Remote Work Environments

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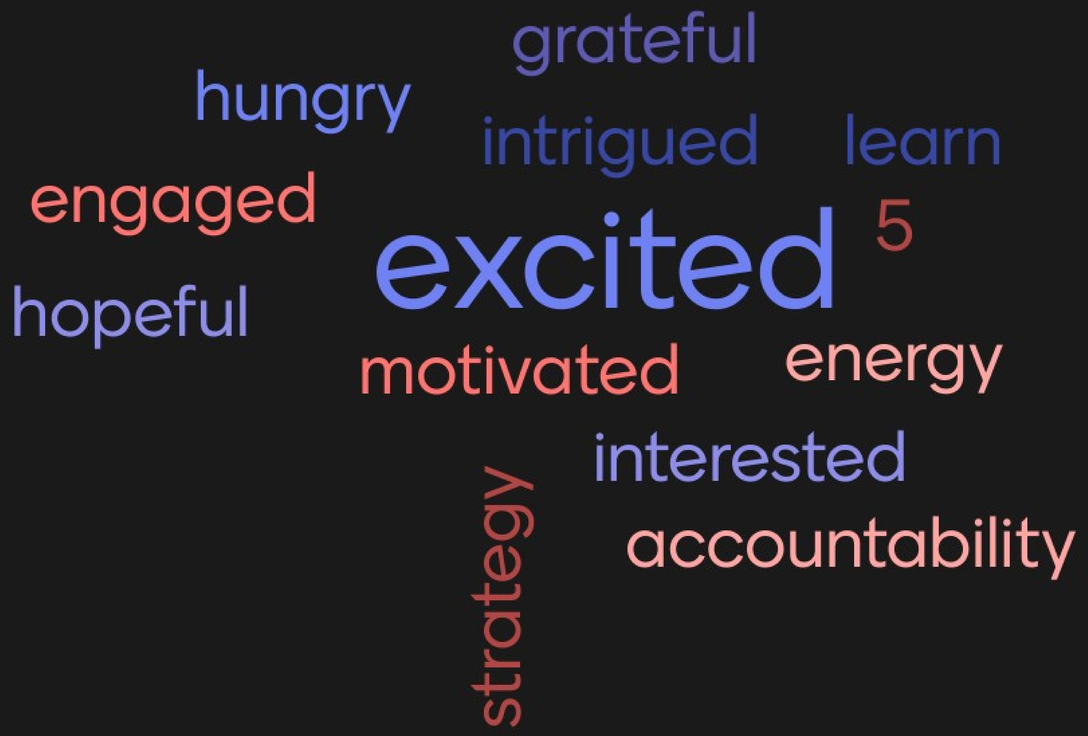
One Word Open

15 responses



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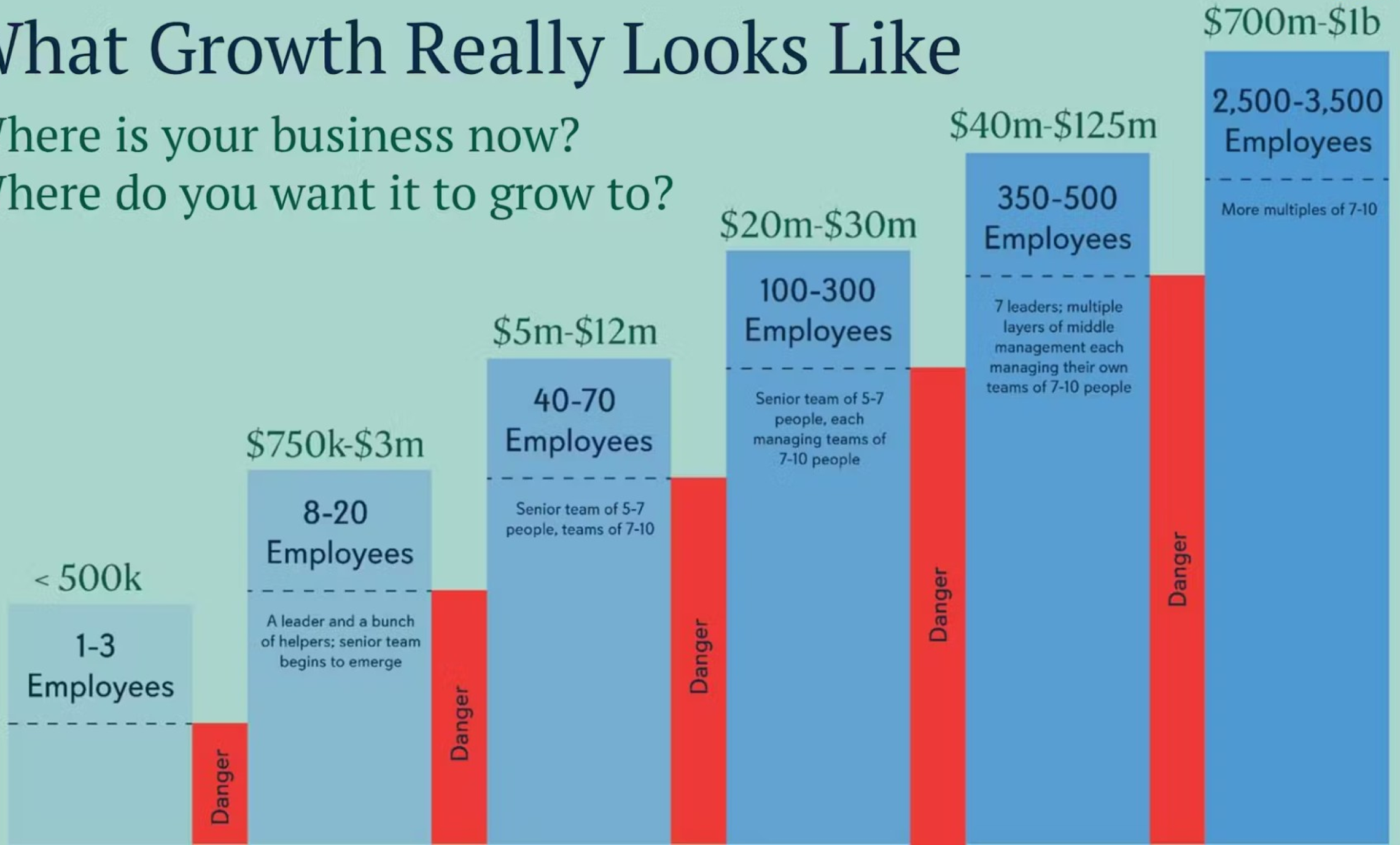
Ryan Villanueva
Senior Growth Consultant
Crews & co.

Jeff Plakans
Founder and President
Commonwealth Payroll & HR

What Growth Really Looks Like

Where is your business now?
Where do you want it to grow to?



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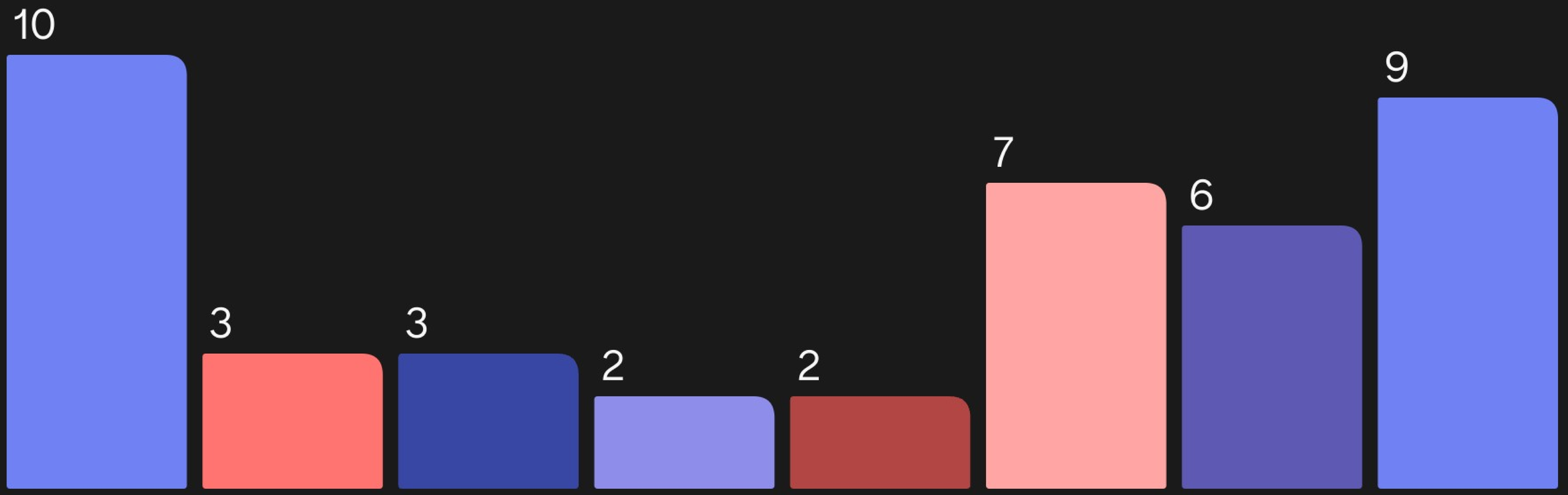
What are your biggest challenges with managing remote teams?



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In one sentence: how would you define **accountability**?

Owning and fixing problems

People do what they say/are expected to

Meeting deadlines

Getting stuff done when you're supposed to

Being able to provide the "receipts" of work that was done.

delivering results

Ensuring people do what they agree to do

Completing tasks timely

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In one sentence: how would you define **accountability**?

Employee should first have a clear understanding of what is required and expected...then take action.

measurement of doing your job

high follow through

being responsible

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A Team that Avoids Accountability . . .

- Creates resentment among team members who have different standards of performance
- Encourages mediocrity
- Misses deadlines and key deliverables
- Places an undue burden on the team leader as the sole source of discipline

A Team that Holds One Another Accountable . . .

- Ensures that poor performers feel pressure to improve
- Identifies potential problems quickly by questioning one another's approaches without hesitation
- Establishes respect among team members who are held to the same high standards
- Avoids excessive bureaucracy around performance management and corrective action

The 5 Dysfunctions of a Team
by Patrick Lencioni

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Practical & Tactical Tools for Remote & Hybrid Team Management

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Practical & Tactical

Scorecards

- 5-10 key metrics that measure activity and outcomes
- Reviewed weekly for visibility and accountability

On Track Meeting (OTM)

- Weekly meeting to make sure numbers are “On Track”
- Focus on problem-solving anything is “Off Track”

80/20 Checklists

- Standardized best practices to eliminate inefficiencies
- Provides clarity on how to execute key responsibilities

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Anatomy of a Scorecard - the Basics

Who	Measurables	Goal	1/6	1/13	1/20	1/27	2/3	2/10	2/17	2/24	3/3	3/10	3/17	3/24	3/31
Rebecca	Sales Team Meetings with Target Accounts - Weekly	1	0	0	1	1	1	2	2	3	3	4	4	5	5
Rebecca	New SQLs - Weekly	2	0	0	1	0	1	2	2	3	2	2	3	2	3
Rebecca	New Logos - 30-Day Trailing	3	0	0	0	0	1	1	2	3	4	4	5	4	5
Chandler	Billable Utilization - 30-Day Trailing	85%	80%	81%	81%	82%	83%	83%	84%	84%	84%	86%	87%	87%	88%
Steve	Speak with New Investors	1	1	0	1	1	0	0	1	1	1	1	0	1	1

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Choosing What to Measure

Sales

- sales calls
- touches
- sales presentations
- proposals
- close ratio
- new leads generated

Operations

- profit
- inventory percentage
- # errors
- utilization rate
- overtime
- complaints

Marketing

- names added to mailing list
- likes/followers in social media
- # of posts
- # of events

Finance

- A/R greater than 60
- cash balance
- errors
- employee satisfaction surveys

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Why is a Scorecard red?

Wrong metric

- This WILL happen on your scorecard journey
- You might have the wrong assumptions or be trying to measure the wrong thing

Unforeseen issues

- Market changes
- Outliers/hiccups

Capacity

- Not enough staff or capacity to meet expectations

Wrong people

- Not a good fit for the role

The root cause of a red scorecard will drive the next steps you should take to fix it.

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On Track Meeting

- Check In (5 minutes)
- Review Scorecard (5 minutes)
- Review Quarterly Objectives (5 minutes)
- Review Action Items from Last Week (5 minutes)
- Share Team/Customer Updates (5 minutes)
- Challenges & Opportunities List (60 minutes)
- Wrap Up (5 minutes)

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80/20 Checklists

Product Launch

1. Determine Target Market and Audience

a. They contain high-level information on what needs to happen to execute a specific process
b. They are not standard operating procedures (SOPs), although they may be fairly detailed
c. They generally do not contain screenshots, etc.

2. Create Product Marketing Plan and Content Calendar

a. Determine timeline of marketing needs (month, semester, sales cycle, etc.)
b. Create centralized calendar for all marketing & content activities
c. Continuously update calendar as time progresses

3. Website Optimization and Updates

a. Update websites / web pages to feature relevant products and information
b. Update HubSpot Forms and CTAs for new relevant products and web pages

4. Create Product Marketing Plan and Content Calendar

a. Guides - Creating new content and/or repurposing evergreen content
b. Articles - Announcing and promoting new products and initiatives, promoting guides and videos, promoting community news and connections, and other inbound content (training articles, etc.)
c. Videos - Creating hype videos for new products and/or repurposing evergreen content for videos

5. Promote the Product

a. Facebook Advertising Campaigns - sharing key information with targeted audience (Moms in specific geographic areas of certain income and education levels)
b. Social Media announcements by audience - Facebook, Instagram, YouTube if applicable
c. Continuous social media promotion throughout marketing & sales cycle
d. Send announcement MMEs to relevant HubSpot lists
e. Continuous email promotion throughout marketing & sales cycle

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80/20 Checklists

Sales & Marketing

Product Launch*..... 2
Sales Process*..... 3
Lead Management..... 4

Human Resources

Hiring*..... 5
Employee Onboarding..... 7
Employee Offboarding..... 8

Product/Service

Product Development..... 9
Customer Onboarding..... 11
Customer Offboarding..... 12

Finance

Invoicing..... 13
Accounts Payable..... 14
Monthly Reporting..... 15
Annual Budgeting..... 16

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80/20 Checklists

Process Adoption Checklist

Objective:

Ensure that company processes are adopted consistently across your entire organization.

- Processes are clearly documented (80/20 Checklists) ☐
- Documentation is easy to find and access ☐
- Key process ownership incorporated in Position Agreement ☐
- Team members have been explicitly trained in process ☐
- Following the "7 Times Rule" - need to train 7 times before you expect compliance ☐
- Processes are tied into Scorecard when applicable ☐
- Follow a "natural consequences" approach (no workarounds) ☐
- Update processes proactively, not just when problems arise ☐
- Automate processes when possible over time ☐
- Address noncompliance immediately (Wrong process? Wrong person? Need support?) ☐
- Commitment to process adoption ("If you can't follow the process, you can't work here.") ☐

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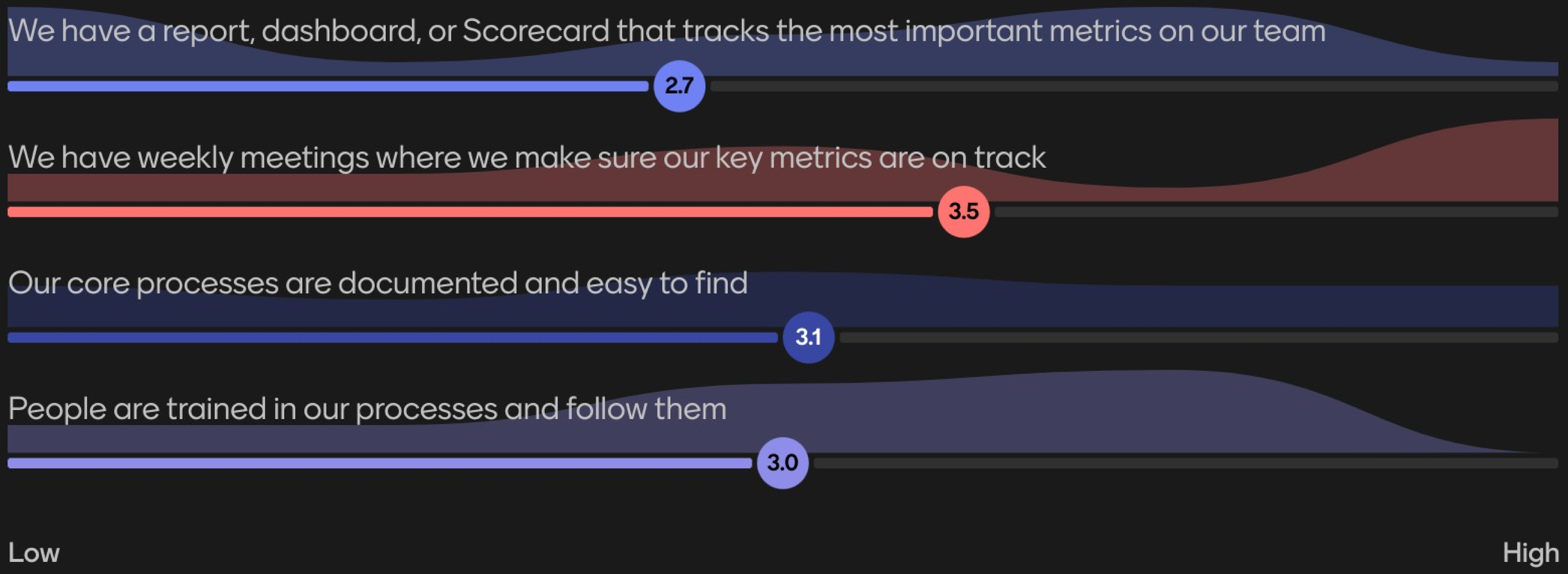
On a scale from 1 (low) to 5 (high), how would you rate the following at your company



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Strategic Solutions for Remote & Hybrid Executive Leadership

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Strategic Solutions

Role Map

- Defines leadership structure and decision-making authority
- Eliminates confusion by clarifying ownership of key functions

Objectives & Key Results (OKRs)

- Aligns company goals across teams and departments
- Creates focus on measurable outcomes and strategic priorities

Quarterly Planning

- Sets the roadmap for execution over the next 90 days
- Ensures leadership alignment on goals, metrics, and initiatives

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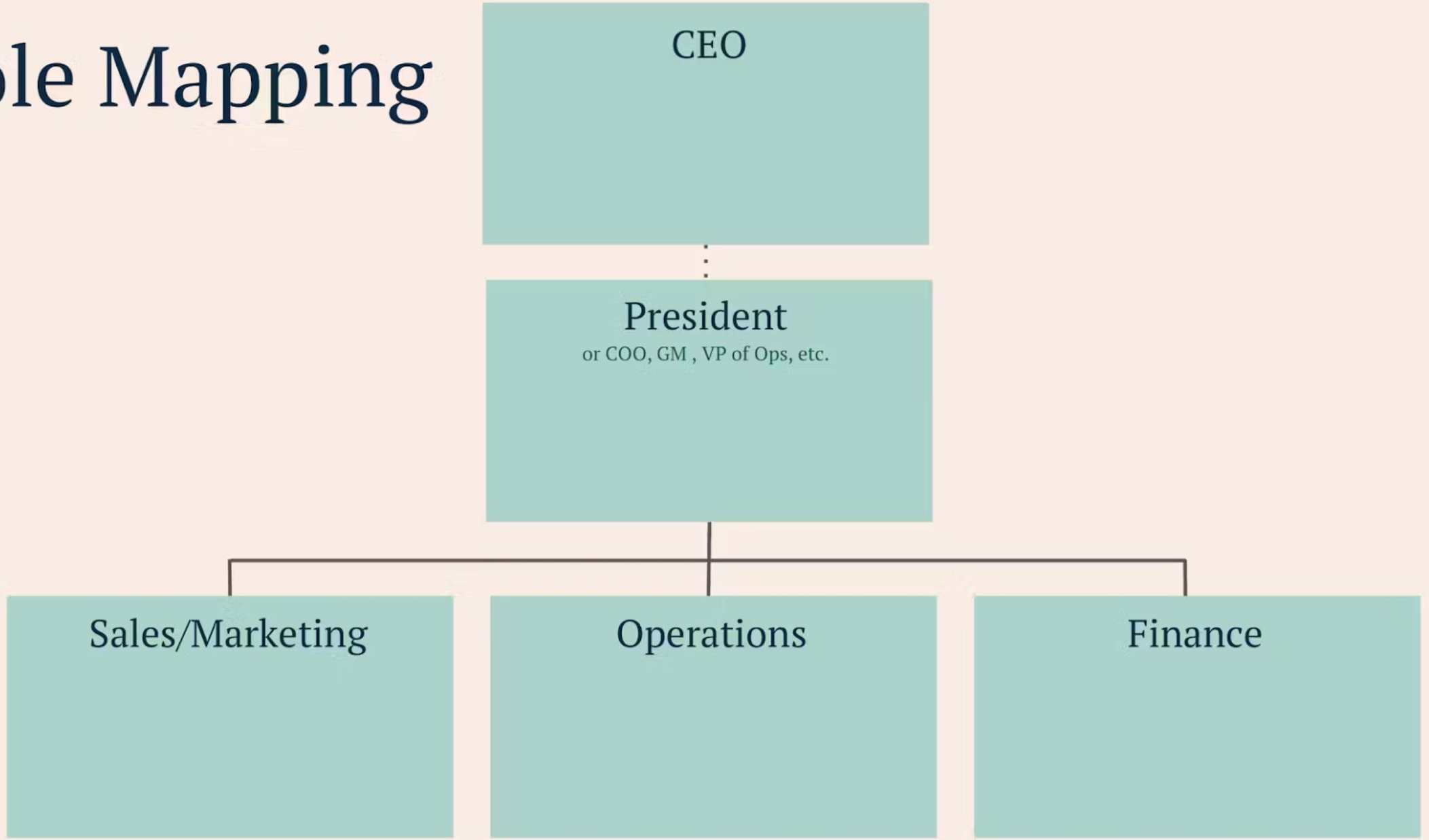
Role Mapping



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Key Accountabilities

- Management is always a given
- Results
- Processes they own
- KPIs
- Should make their “number” clear

Time Frame: Now through 05/10/24

CEO

Key Accountabilities:

Company Vision
Company Culture
Key Relationships

President

or COO, GM , VP of Ops, etc.

Key Accountabilities:

Hitting P&L targets
80% OKR completion
Ensuring scorecard is on-track
Hiring the right people for the right seats

Sales & Marketing

Key Accountabilities:

Hitting revenue targets
Creating a stable lead funnel
Maintaining the marketing calendar

Operations

Key Accountabilities:

Hitting gross margin targets
Ensuring quality of the service/product
Hitting client retention targets

Finance

Key Accountabilities:

3-Year and Annual Budgeting
Monthly Reporting
Monthly Forecasting

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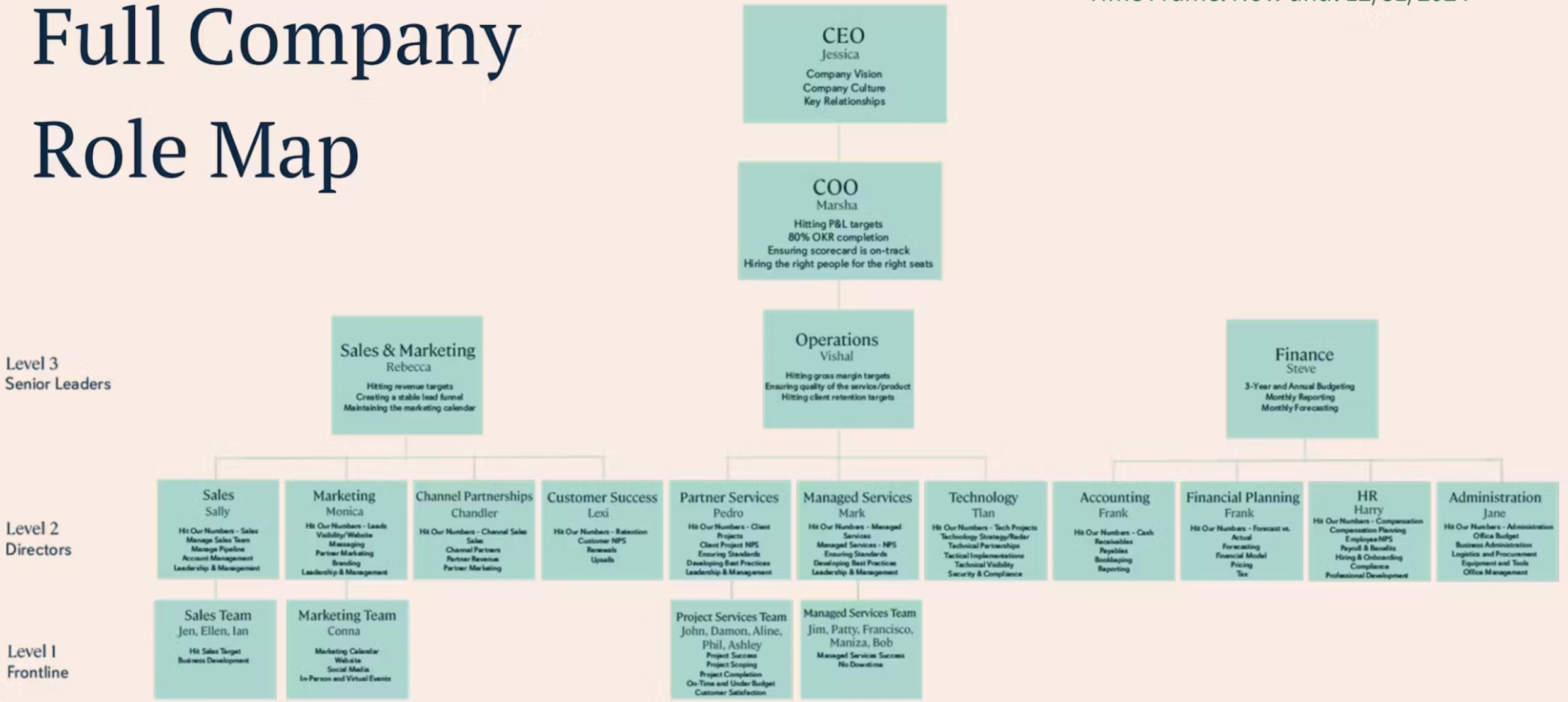
Time Frame: Now until 12/31/2024

Full Company Role Map



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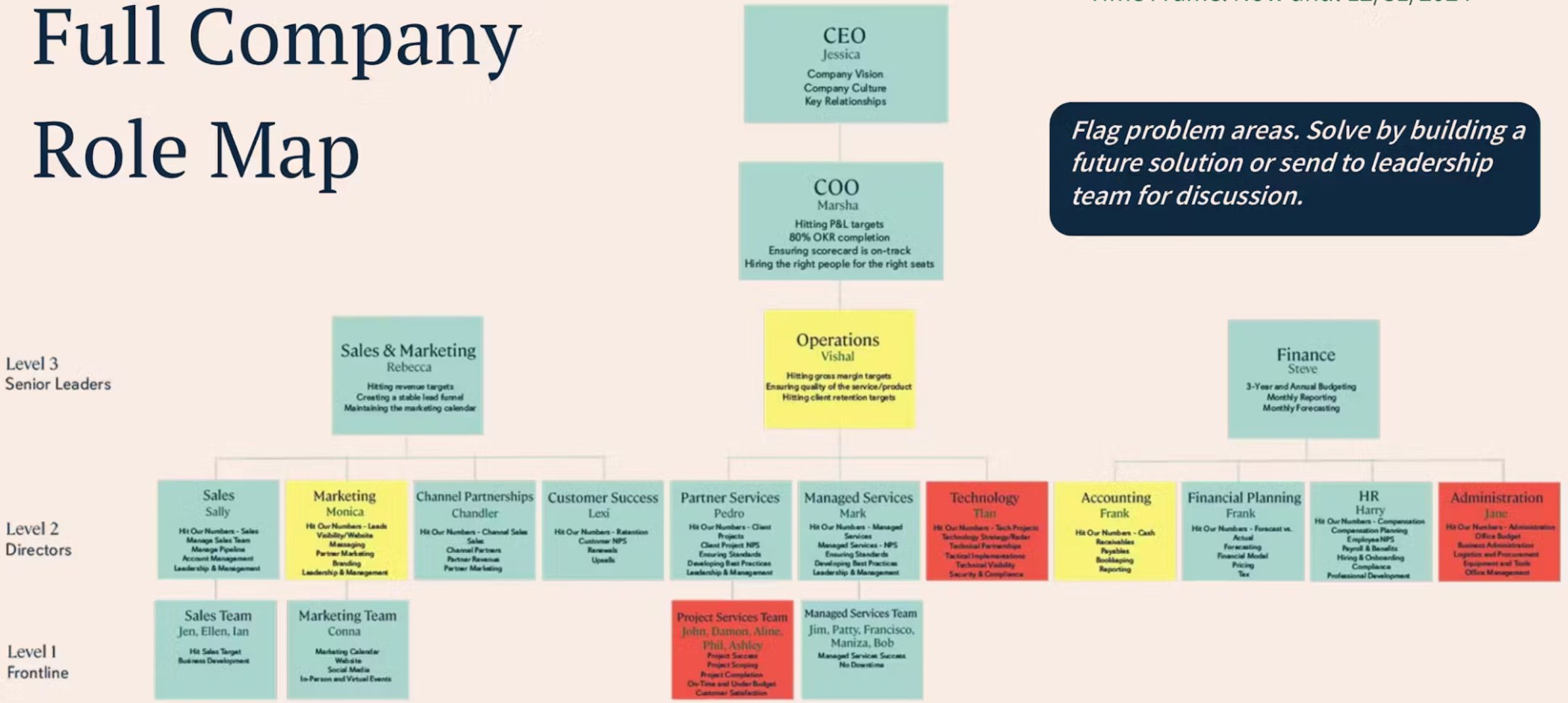
Time Frame: Now until 12/31/2024

Full Company Role Map

Flag problem areas. Solve by building a future solution or send to leadership team for discussion.



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Right People, Right Seats, Right Time

Now through 08/31/24

Sales
CEO

Effective 9/1/24

Sales
CEO

Biz Dev Rep

Effective 7/1/25

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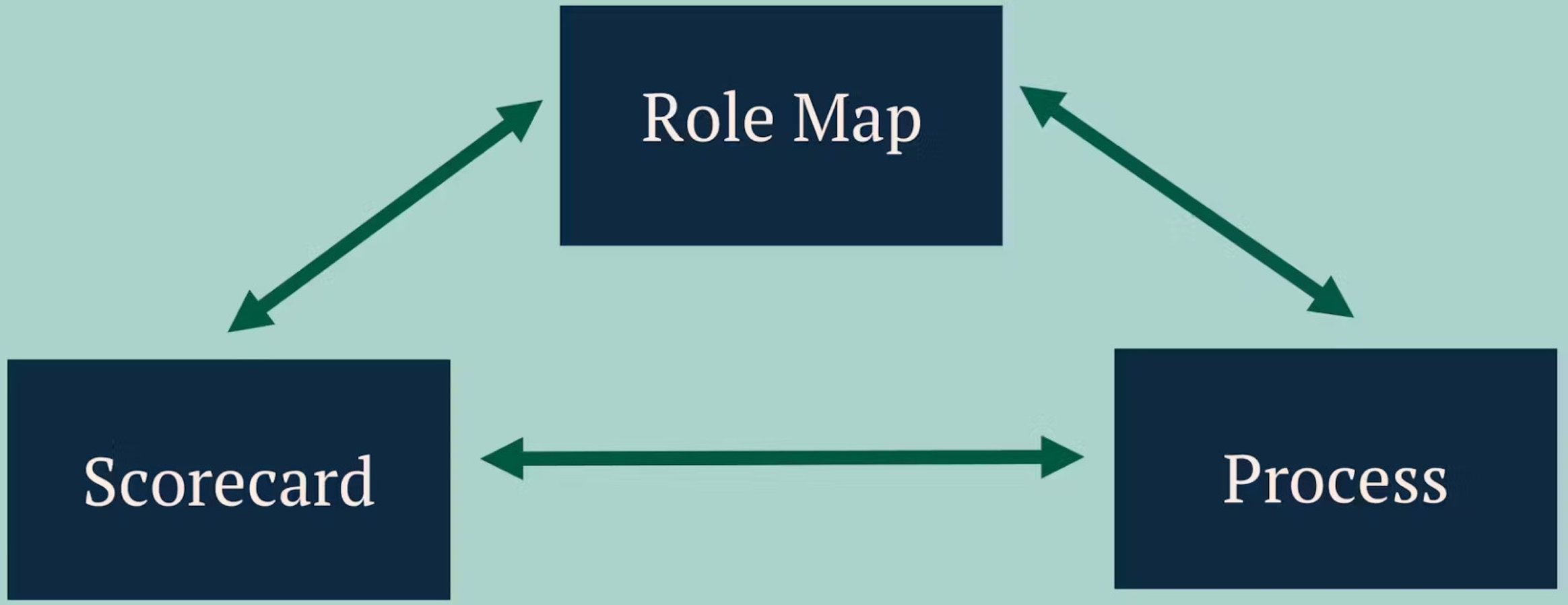
Putting It Together



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Objectives & Key Results

The Objective

The What: the main thing you want to accomplish; your objective will inform your actions. It isn't always measurable, and that's OK.

The Key Results

The benchmarks you'll use to track your path to your objective. They're 3-5 goalposts or milestones to help you assess your progress, and they're specific and measurable.

1-3 of the goalposts are generally measurable outcomes and 1-3 are project based (things that will help you get there).

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General Manager

Makes $ for owners

High-Level Objective

- Win superbowl
- Fill stands to 88%

Key Results define success or milestones

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General Manager

Makes $ for owners

- Win superbowl
- Fill stands to 88%

Key Results become Objectives for the next layer of management

Head Coach

Win Superbowl

- 200 yd passing attack
- N. 3 in defensive stats
- 25 YD punt return average

Public Relations

Fill stands to 88%

- Hire 2 colorful players
- Get media coverage
- Highlight key players

Managers determine the next set of Key Results

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General Manager

Makes $ for owners

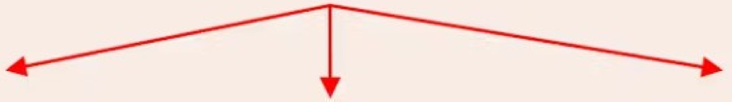
- Win superbowl
- Fill stands to 88%

OKRs create alignment up and down the organization

Head Coach

Win Superbowl

- 200 yd passing attack
- N. 3 in defensive stats
- 25 YD punt return average



Defense

#3 defense

- Less than 100 yds passing

Offense

200 yd passing attack

- 75% completion

Special Teams

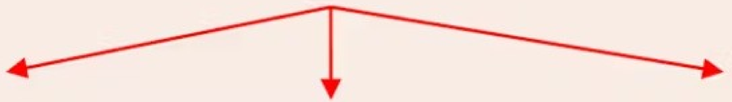
25 yd punt return

- Train blockers

Public Relations

Fill stands to 88%

- Hire 2 colorful players
- Get media coverage
- Highlight key players



News Staff

Highlight key players

- 3 Sunday Features articles

Scouts

Hire colorful players

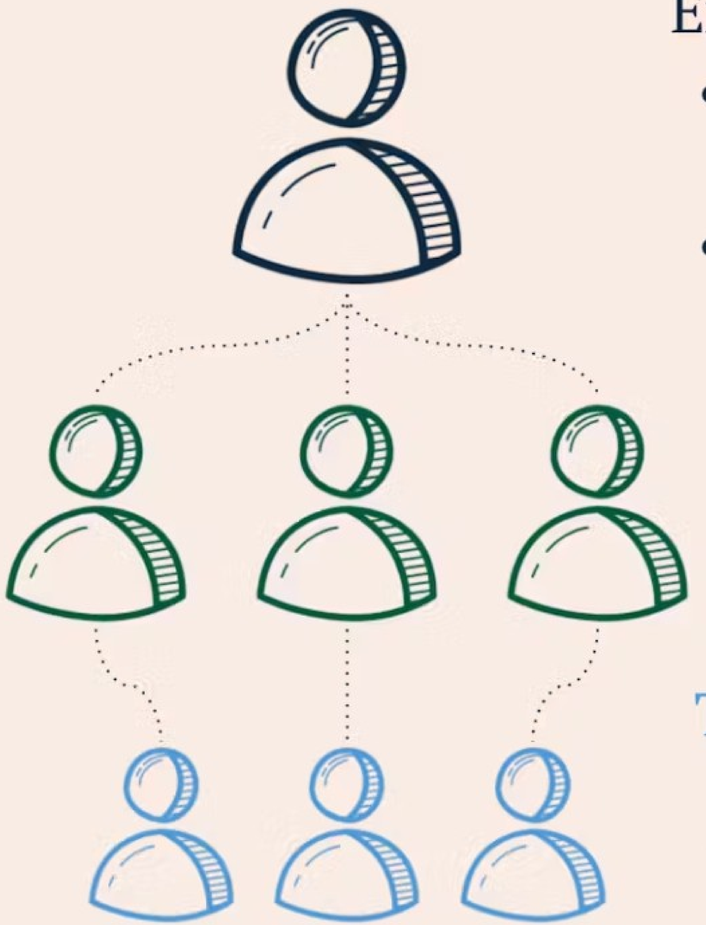
- Visit to colleges

Publicity Agent

Get media coverage

Objectives & Key Results

OKRs Create Alignment



Executives

- Can plan both strategically (thinking big) and tactically (getting things done)
- Ensure employees are aligned, accountable, and working towards business goals

Managers

- Have a vision of corporate priorities
- Set clear expectations
- Easily track and manage the progress of their teams

Teams

- More engaged
- Understand their value in working towards corporate goals
- Empowered to find their own ways to contribute

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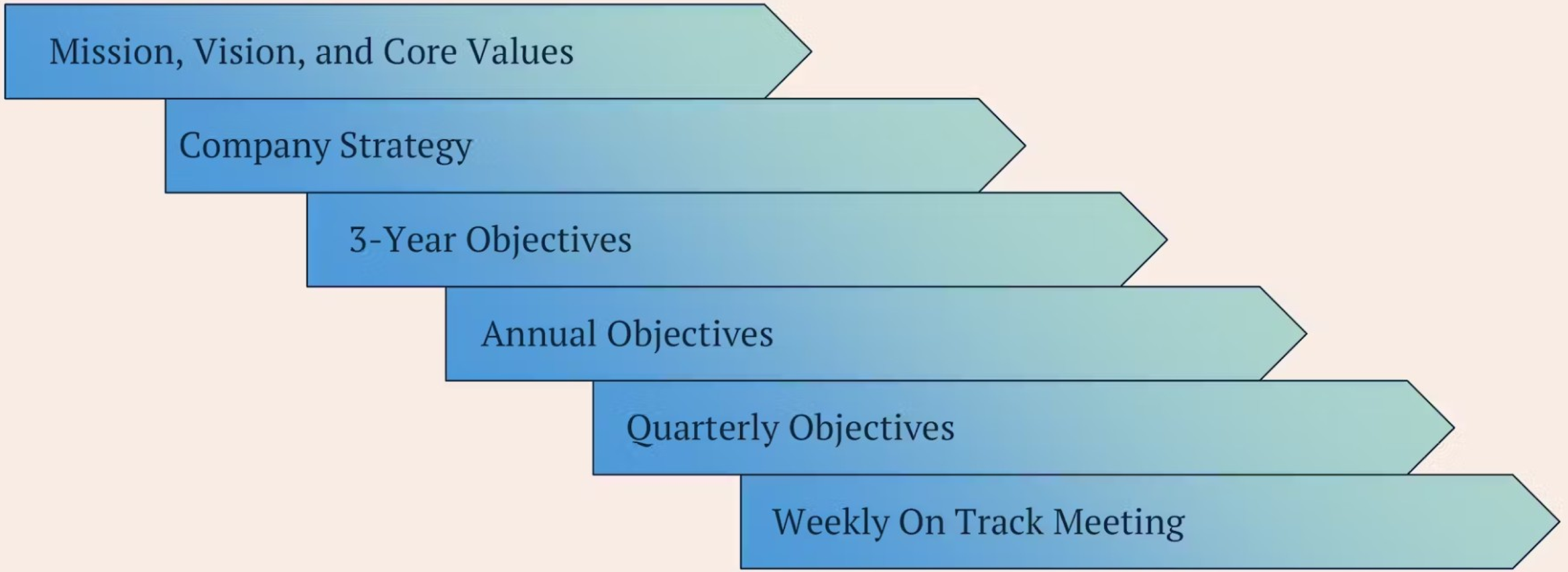
From Vision and Strategy to Roadmap and Execution



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Meeting Rhythms

Annual Planning

- 1-2 days with senior leadership
- 3 Year Vision, Annual Objectives, Team Trust

Quarterly Planning

- 1 day with senior leadership
- Review Quarter, Quarterly Objectives, Challenges & Opportunities

Strategy Workshop (Semi-Annual)

- 2-4 hours with senior leadership
- Brainstorm and talk about key strategic initiatives

On Track Meeting (Weekly)

- 90 minutes with senior leadership
- Stay on track with Quarterly Numbers and Objectives

Daily Huddle (Optional)

- 15 minutes with entire team or department
- Status updates, remove obstacles

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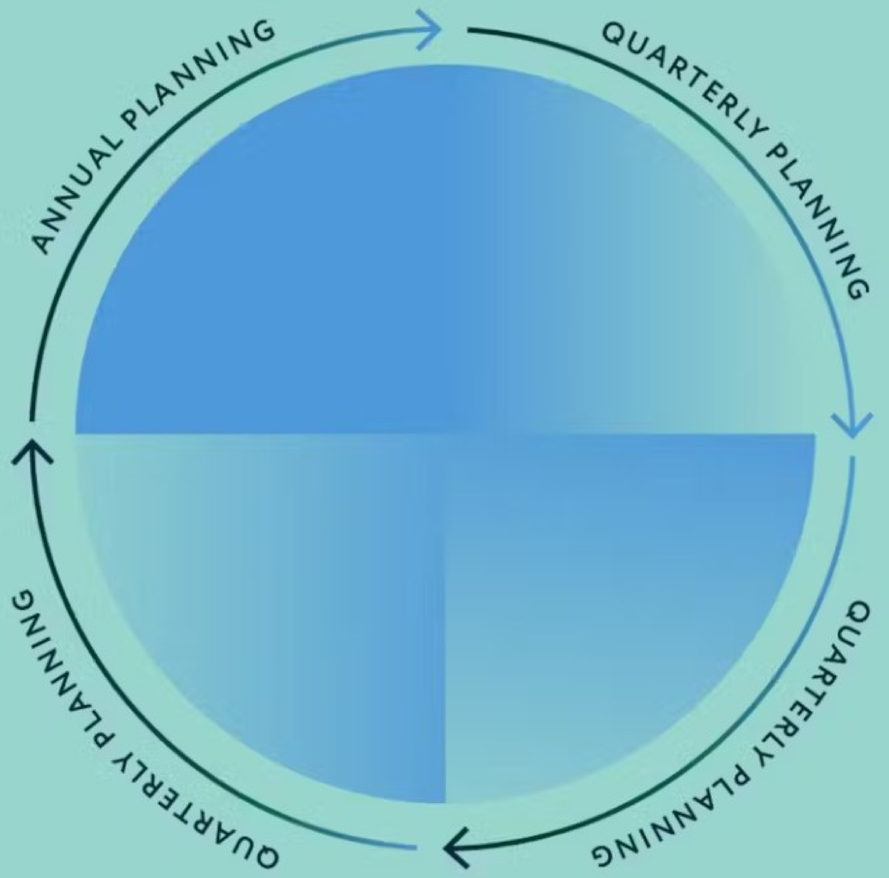

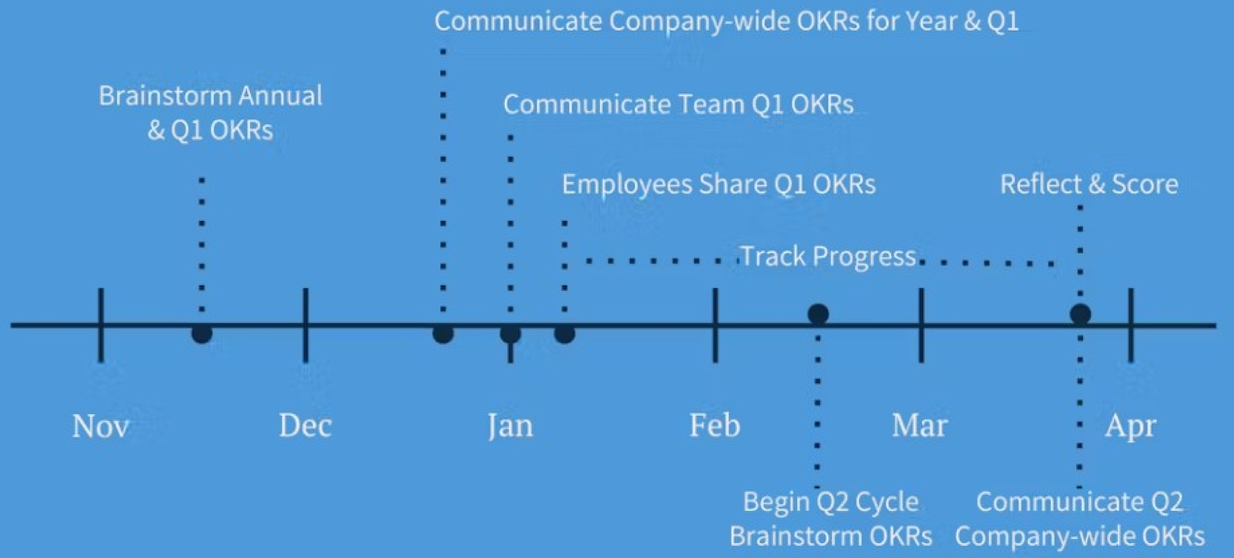

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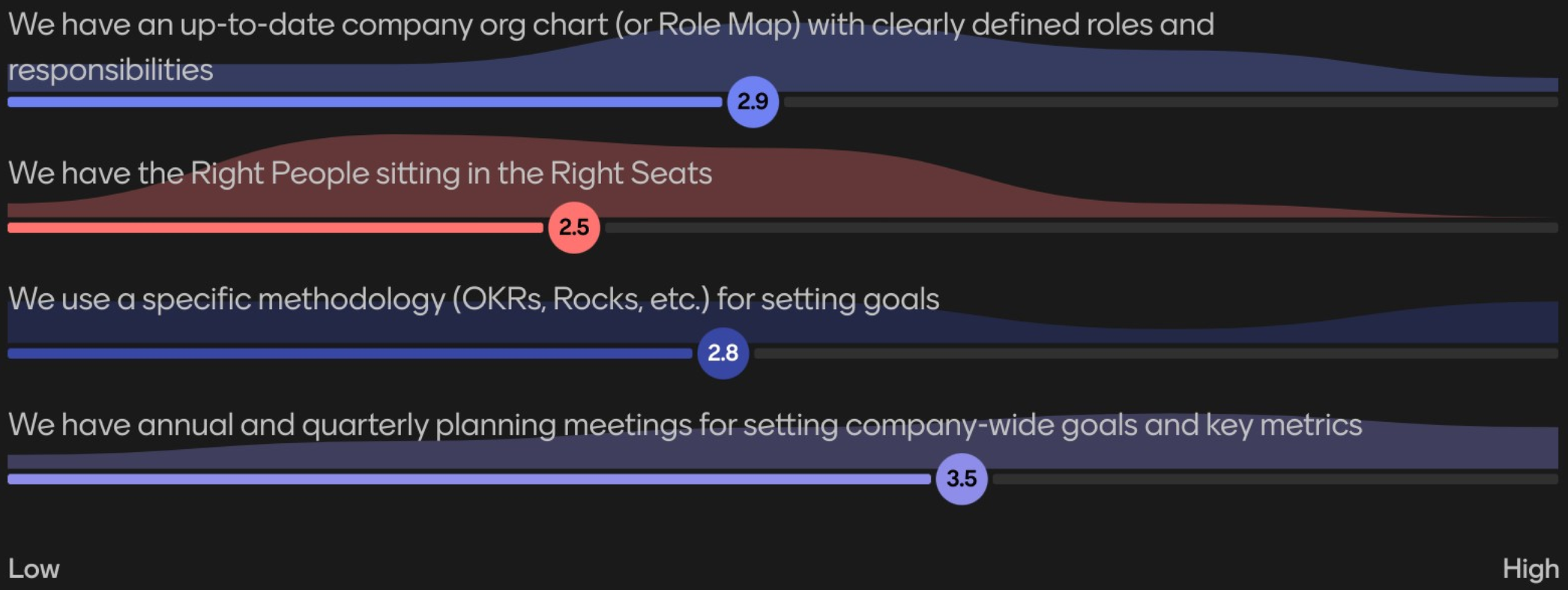

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Creating a Culture of **Accountability & Alignment** in Remote & Hybrid Companies

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Creating Culture

Core Values

- Defines the behaviors and principles that drive decision-making
- Ensures hiring, feedback, and recognition align with company culture

Quarterly Check-In

- Structured coaching conversations to track progress and development
- Provides employees with clarity, feedback, and opportunities for growth

Position Agreement

- Clearly outlines role expectations, key responsibilities, and success metrics
- Ensures accountability by defining what great performance looks like

Team Health Building

- Strengthens trust, collaboration, and communication across teams
- Creates an environment where feedback and accountability thrive

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Who we are:
Core Values

Core Values attract the right people into your organization—and help you hire, fire, recognize, and reward accordingly.

Definition

3-5 characteristics that define your company's DNA

Example Core Values (Crews & co.)

- Help First
- Work the Plan
- Humbly Confident
- Enjoy the Ride
- Your Business is Our Business

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Quarterly Check In

Team Member:

Role:

Date:

Values/Desire/Results

Rate red/yellow/green

	Manager			Team Member		
Value 1	☐	☐	☐	☐	☐	☐
Value 2	☐	☐	☐	☐	☐	☐
Value 3	☐	☐	☐	☐	☐	☐
Value 4	☐	☐	☐	☐	☐	☐
Desire	☐	☐	☐	☐	☐	☐
Results	☐	☐	☐	☐	☐	☐

Scorecard

Evaluate performance against Scorecard metrics.

OKRs

Evaluate performance against Quarterly Objectives and Key Results.

Working/Not Working

Working	Not Working
Manager:	Manager:
Team Member:	Team Member:

Next 90 Days

Can't Address
Team Member Address
Manager Address

Next Steps

List together and document with deadlines

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Position Agreement

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Position Agreement (Template)

Give your team members complete clarity on what will be expected from them in their roles.

Position:

Accountabilities:

-
-
-
-

Scorecard Measurables & Metrics:

-
-
-
-

Processes:

-
-
-
-

*If the employee needs to create the processes, note that processes are TBD and will need to be developed as part of this role.

My signature below acknowledges that I understand and am willing to be responsible for the items set forth in this Position Agreement.

(Sign & Date)

_____ _____

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Position Agreement

Position Agreement (Example)

Give your team members complete clarity on what will be expected from them in their roles.

Position: Director of Sales & Marketing

Accountabilities:

- Manage sales and marketing teams
- Sales and marketing plan
- New business development and lead generation
- Content development

Scorecard Measurables & Metrics:

- Number of leads: 2 per week
- Number of marketing events: 1 per month
- Conversion rate: 50% or better
- Number of referral requests: 1 per week

Processes:

- Event planning process
- Sales process
- Content development process
- Cross-selling process

*If the employee needs to create the processes, note that processes are TBD and will need to be developed as part of this role.

My signature below acknowledges that I understand and am willing to be responsible for the items set forth in this Position Agreement.

(Sign & Date)

_____ _____

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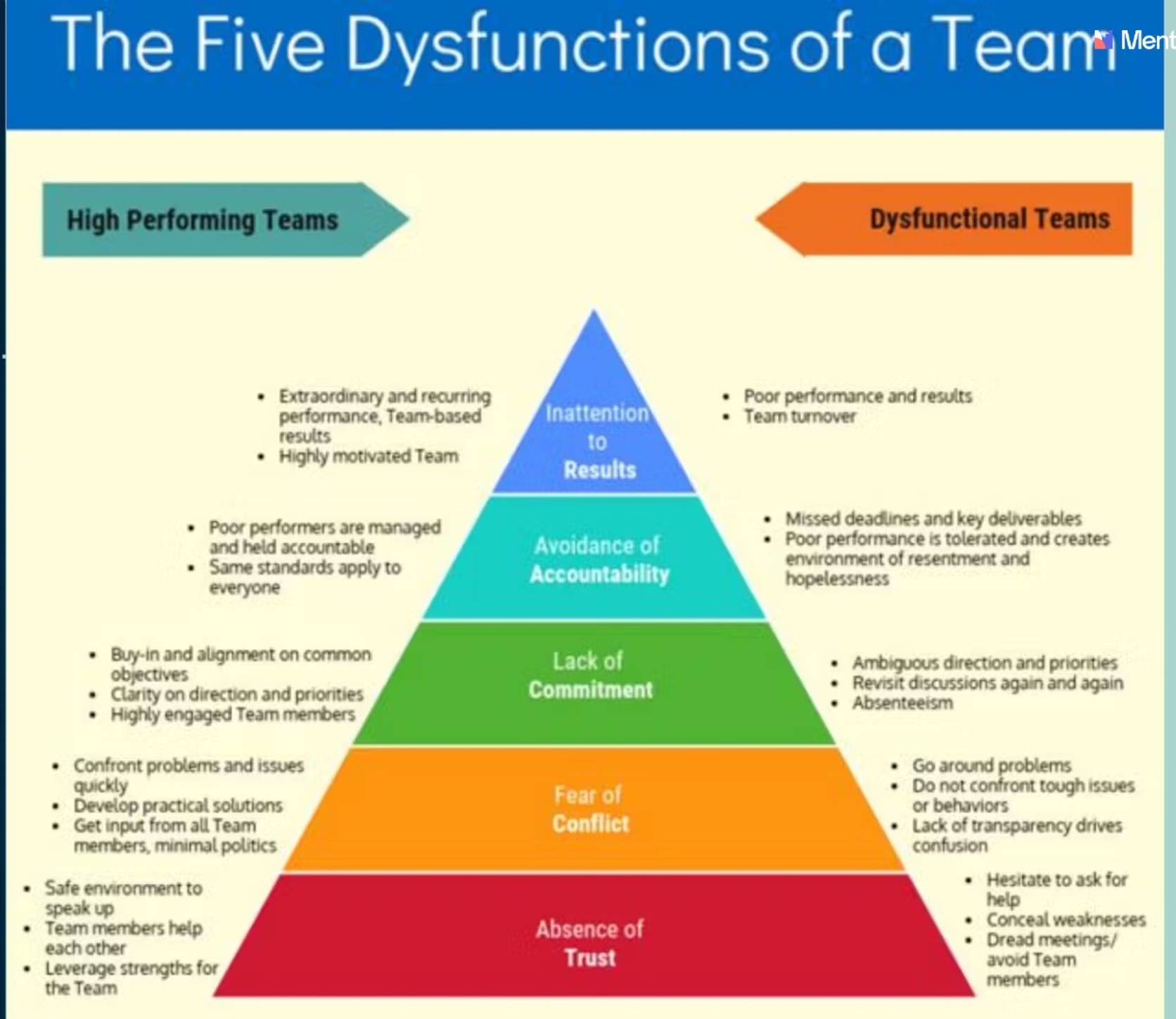
Team Health


The Five Dysfunctions of a Team
High Performing Teams
Dysfunctional Teams
Inattention to Results
Extraordinary and recurring performance, Team-based results
Highly motivated Team
Poor performance and results
Team turnover
Avoidance of Accountability
Poor performers are managed and held accountable
Same standards apply to everyone
Missed deadlines and key deliverables
Poor performance is tolerated and creates environment of resentment and hopelessness
Lack of Commitment
Buy-in and alignment on common objectives
Clarity on direction and priorities
Highly engaged Team members
Ambiguous direction and priorities
Revisit discussions again and again
Absenteeism
Fear of Conflict
Confront problems and issues quickly
Develop practical solutions
Get input from all Team members, minimal politics
Go around problems
Do not confront tough issues or behaviors
Lack of transparency drives confusion
Absence of Trust
Safe environment to speak up
Team members help each other
Leverage strengths for the Team
Hesitate to ask for help
Conceal weaknesses
Dread meetings/ avoid Team members

Team Health

Exercises for building trust and maintaining team health:

Team Functions (based on Lencioni's 5 Dysfunctions of a Team)

- Have the whole team read *The Five Dysfunctions of a Team*
- Rank team health from 1-10 based on functional team pyramid

Conversation Starter (5 questions)

- Hometown
- Greatest challenge growing up
- # of siblings
- What is your favorite book and/or TV show/movie?
- What is your secret talent/hobby that nobody else knows about?

The One Thing Exercise

- One thing that each person does for the company or a trait that each person has that is amazing
- One thing that each person needs to either start doing or stop doing for the good of the company in the upcoming year
- Review quarterly: same, better, or worse?

DiSC Profiles

"Clean" Meeting

- 1:1 meeting
- Clear the air on a specific topic

Social Fun

- Ideally in person
- At least every 90 days
- Meals, retreats, activities
- Quarterly Check-ins don't count

24 Hour Rule

- Deal with any issues or hurt feelings in 24 hours or less

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On a scale from 1 (low) to 5 (high), how would you rate the following at your company

We have core values, and everyone who works at our company embodies them

Every manager does a Quarterly Conversation with their direct reports every quarter

Everyone has an up-to-date Position Agreement or job description that reflects what they're currently doing

Everyone on our team demonstrates a high level of trust with one another

Low High

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Q&A

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Let’s continue the conversation!

Scan to connect with today’s hosts