

# Building a Strong Remote Team

“Work is not somewhere you go, it is something you do.”

## Appendix

Leadership Academy Team D  
July 2020

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# Remote Work Training Recommendations

Click on a training below to be navigated to MO Learning!



## Building Trust

Building Trust

## Communication

Digital Body Language

## Effective Coaching and Feedback

Performance and Virtual Teams

Developing Adaptable Employees

Leading at a Distance

Managing Virtual Teams

## Leveraging Technology

Business Collaboration in the Modern Workplace

Remote Work Foundations

Executive Presence on Video Conference Calls

Leading Virtual Meetings

## What Success Looks Like

Working Remotely

Tips for Working Remotely

## Work/Life Balance

Time Management: Working from Home



# Remote Work Collaboration Training Recommendations

Click on a training below to be navigated to MO Learning!

<b>Adobe Acrobat DC</b> Learning Acrobat Reader DC	<b>Adobe Premiere Pro</b> Adobe Premiere Pro CC 2019 Essential Training: The Basics	<b>Box</b> Learning Box	<b>Cisco Jabber</b> State of Missouri - Jabber Training
<b>Git</b> Git for Teams	<b>GitHub</b> Learning GitHub	<b>Jira</b> Learning Jira Software	<b>Google Hangouts</b> Google Hangouts Essential Training
<b>MS Outlook</b> Outlook	<b>MS Powerpoint</b> Master Microsoft PowerPoint	<b>MS Project</b> Learning Microsoft Project	<b>MS Sharepoint, Teams and Groups</b> Microsoft Collaboration: SharePoint, Teams, and Groups
<b>MS Teams</b> Microsoft Teams Tips and Tricks	<b>MS Teams</b> Microsoft Teams Essential Training	<b>MS Teams</b> Microsoft Teams Quick Tips	<b>MS Windows</b> Computer Literacy for Windows 10
<b>Slack</b> Learning Slack	<b>Trello</b> Trello Essential Training	<b>Webex</b> Learning WebEx (2018)	<b>Webex</b> Learning Webex Meetings
<b>Zoom</b> Learning Zoom			

## EMPLOYEE GOALS CHECKLIST

Name:

Time Period:

First meeting:

- Outline employee roles/responsibilities – discuss behaviors, skills, tasks, and outputs of their role.
- Identify team initiatives and find ways to leverage and improve strengths.
- Set clear, measurable (SMART) goals.

Daily Goals:

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Weekly Goals:

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Big Goals:

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Challenges/Opportunities/Coaching during this review period:

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Goals for the Next Review Period:

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# GOALS & OBJECTIVES

PROJECT NAME	NOTES:
EMPLOYEE NAME	
SUPERVISOR NAME	
DATE	

GOAL [Enter goals below]	<b>Goals</b> are high level statements that provide overall context for what the project is trying to achieve, and should align to business goals.
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	<b>SPECIFIC:</b> Who? What? When? Where? Why? Which?
	<b>MEASURABLE:</b> Metrics and milestones. How much? What percentage?
	<b>ACHIEVABLE:</b> Do you have skills and tools to accomplish this objective?
	<b>RELEVANT:</b> Does it fit with overall organizational objectives?
	<b>TIME-BOUND:</b> Intermediate and final deadline

OBJECTIVE 1 [Enter objectives below]	<b>Objectives</b> are lower level statements that describe the specific, tangible products and deliverables that the project will deliver.
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	<b>SPECIFIC:</b> Who? What? When? Where? Why? Which?
	<b>MEASURABLE:</b> Metrics and milestones. How much? What percentage?
	<b>ACHIEVABLE:</b> Do you have skills and tools to accomplish this objective?
	<b>RELEVANT:</b> Does it fit with overall organizational objectives?
	<b>TIME-BOUND:</b> Intermediate and final deadline

OBJECTIVE 2 [Enter objectives below]	<b>Objectives</b> are lower level statements that describe the specific, tangible products and deliverables that the project will deliver.
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	<b>SPECIFIC:</b> Who? What? When? Where? Why? Which?
--	--

	<b>MEASURABLE:</b> Metrics and milestones. How much? What percentage?
	<b>ACHIEVABLE:</b> Do you have skills and tools to accomplish this objective?
	<b>RELEVANT:</b> Does it fit with overall organizational objectives?
	<b>TIME-BOUND:</b> Intermediate and final deadline
<b>OBJECTIVE 3 [Enter objectives below]</b>	<i>Objectives</i> are lower level statements that describe the specific, tangible products and deliverables that the project will deliver. [Enter objectives here]



# ACCOUNTABILITY PERFORMANCE PLAN

## GOALS & OBJECTIVES

### TASKS

EMPLOYEE NAME	SUPERVISOR NAME
TOP 5 PRIORITIES FOR THE WEEK	DATE
1 [Enter Priorities Here]	Create a to-do list of tasks that need to be completed each day. List each job and rank them in order of importance. Complete the urgent and most important jobs first, and save the tasks that are neither important nor urgent for last. Ask supervisor for guidance.
2	
3	
4	
5	
GOALS & OBJECTIVES [Enter Goals Below]	5-STEP ACTION PLAN FOR ACCOUNTABILITY INSTRUCTIONS
GOAL 1	Step One
	Meet with employees individually to clearly outline their role and responsibilities. Discuss the behaviors, tasks, skills, and outputs that their role encompasses, so they have a clear picture of how to embody it.
GOAL 2	Step Two
	Review upcoming team initiatives with each employee and find opportunities for them to leverage and improve their strengths. Set clear, measurable goals with your employees so there's a common understanding of what's expected of them.
GOAL 3	Step Three
	Have regular, structured one-on-ones with employees to monitor their progress, give constructive feedback, and revisit their goals – remind them that goals can shift alongside the team's context and priorities.
GOAL 4	Step Four
	If you see a team members' productivity dropping, meet with them to get to the root of the issue. Is their workload too much? Are they misaligned with their peers? Help guide them to solutions by asking meaningful questions.
GOAL 5	Step Five
	Coaching and feedback is used to reinforce appropriate behavior, to teach the employee new skills, to motivate employee to pursue higher levels of performance, to mentor employees, as well as to correct performance deficiencies.

### SMART GOALS

**SPECIFIC:** Who? What? When? Where? Why? Which?

**MEASURABLE:** Metrics and milestones. How much? What percentage?

**ACHIEVABLE:** Do you have skills and tools to accomplish this objective?

**RELEVANT:** Is the goal(s) within reach, realistic, and relevant? Does it fit with overall organizational objectives?

**TIME-BOUND:** With a clearly defined timeline, including a starting date and a target date.

### References

- <https://asana.com/resources/project-milestones>
- <https://corporatefinanceinstitute.com/resources/knowledge/other/smart-goal/>
- <https://www.linkedin.com/learning/improving-employee-performance/creating-appropriate-work-spaces?u=35674036>
- <https://www.linkedin.com/learning/performance-management-setting-goals-and-managing-performance/process-considerations?u=35674036>

# GOALS & OBJECTIVES

<b>PROJECT NAME:</b> Sales and Use Tax Statutes Educational Video Project	<b>NOTES:</b> Project to design and publish a series of Auditor Educational Videos on the Statutory Framework for Imposition of Sales and Use Tax.
<b>EMPLOYEE NAME</b>	
<b>SUPERVISOR NAME</b>	
<b>DATE</b>	

<b>GOAL</b>	<b>Goals</b> are high level statements that provide overall context for what the project is trying to achieve, and should align to business goals.
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1. Statute Training Team to Develop Training Materials to be used in Educational Project by 09/15/2020.	<b>SPECIFIC:</b> Who? What? When? Where? Why? Which?
2. Statute Training Team to Record & Edit Training Sessions; Publish & Share Educational Videos by 10/30/2020.	<b>MEASURABLE:</b> Metrics and milestones. How much? What percentage?
3. Implement Training Tracking System and Seek Feedback on Effectiveness of New Program by 11/15/2020.	<b>ACHIEVABLE:</b> Do you have skills and tools to accomplish this objective?
	<b>RELEVANT:</b> Does it fit with overall organizational objectives?
	<b>TIME-BOUND:</b> Intermediate and final deadline

<b>OBJECTIVE 1 - Develop Training Materials</b>	<b>Objectives</b> are lower level statements that describe the specific, tangible products and deliverables that the project will deliver.
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1. Identify Team Members & Assign Team Roles & Norms. (07/01/2020)	<b>SPECIFIC:</b> Who? What? When? Where? Why? Which?
2. Develop Framework & Training Flow Design. (07/31/2020)	<b>MEASURABLE:</b> Metrics and milestones. How much? What percentage?
3. Develop PowerPoint Presentation, Examples, Quiz, and Presenter Script. (09/01/2020)	<b>ACHIEVABLE:</b> Do you have skills and tools to accomplish this objective?
4. Circulate Materials & Solicit Feedback from Management. (09/01/2020)	<b>RELEVANT:</b> Does it fit with overall organizational objectives?
5. Finalize Materials with Suggested Changes. (09/15/2020)	<b>TIME-BOUND:</b> Intermediate and final deadline

<b>OBJECTIVE 2 - Record &amp; Edit Training Sessions</b>	<b>Objectives</b> are lower level statements that describe the specific, tangible products and deliverables that the project will deliver.
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1. Identify Presenters for Each Topic in the Presentation. (09/01/2020)	<b>SPECIFIC:</b> Who? What? When? Where? Why? Which?
2. Schedule Time to Present and Record Training. (09/15/2020)	<b>MEASURABLE:</b> Metrics and milestones. How much? What percentage?
3. Complete Recording of Training. (09/30/2020)	<b>ACHIEVABLE:</b> Do you have skills and tools to accomplish this objective?
4. Complete Edit of Training, Publish Video, and Share to Management Team for Comment. (10/15/2020)	<b>RELEVANT:</b> Does it fit with overall organizational objectives?
5. Update Videos with Edits and Implement into Auditor Training Program. (10/30/2020)	<b>TIME-BOUND:</b> Intermediate and final deadline
<b>OBJECTIVE 3 - Implement Training Tracking System and Seek Feedback on Effectiveness of New Program</b>	<b>Objectives</b> are lower level statements that describe the specific, tangible products and deliverables that the project will deliver. [Enter objectives here]

# ACCOUNTABILITY PERFORMANCE PLAN

## GOALS & OBJECTIVES

Sales and Use Tax Auditor II

EMPLOYEE NAME	SUPERVISOR NAME
TOP 5 PRIORITIES FOR THE WEEK	DATE
1 Finalize Audit Package for ABC Audit	Create a to-do list of tasks that need to be completed each day. List each job and rank them in order of importance. Complete the urgent and most important jobs first, and save the tasks that are neither important nor urgent for last. Ask supervisor for guidance.
2 Computation of DEF Audit	
3 Field Work for GHI Audit	
4 Field Work for JKL Audit	
5 Work on Research Project	
GOALS & OBJECTIVES [Enter Goals Below]	5-STEP ACTION PLAN FOR ACCOUNTABILITY INSTRUCTIONS
GOAL 1	Step One
Strive to conduct 20 Audits of Medium to Large Businesses within the 12 month period.	Meet with employees individually to clearly outline their role and responsibilities. Discuss the behaviors, tasks, skills, and outputs that their role encompasses, so they have a clear picture of how to embody it.
GOAL 2	Step Two
Strive to complete each audit of Large Businesses in less than 200 Hours; strive to complete each audit of Medium Businesses in less than 75 Hours.	Review upcoming team initiatives with each employee and find opportunities for them to leverage and improve their strengths. Set clear, measurable goals with your employees so there's a common understanding of what's expected of them.
GOAL 3	Step Three
Strive to complete each audit of Large Businesses in less than 300 Days; strive to complete each audit of Medium Businesses in less than 200 Days.	Have regular, structured one-on-ones with employees to monitor their progress, give constructive feedback, and revisit their goals – remind them that goals can shift alongside the team's context and priorities.
GOAL 4	Step Four
Strive to limit time spent on No Findings Audits to less than 50 hours.	If you see a team members' productivity dropping, meet with them to get to the root of the issue. Is their workload too much? Are they misaligned with their peers? Help guide them to solutions by asking meaningful questions.
GOAL 5	Step Five
Strive to limit the number of audits open over 300 days to no more than 5% of inventory.	Coaching and feedback is used to reinforce appropriate behavior, to teach the employee new skills, to motivate employee to pursue higher levels of performance, to mentor employees, as well as to correct performance deficiencies.
SMART GOALS	

**SPECIFIC:** Who? What? When? Where? Why? Which?

**MEASURABLE:** Metrics and milestones. How much? What percentage?

**ACHIEVABLE:** Do you have skills and tools to accomplish this objective?

**RELEVANT:** Is the goal(s) within reach, realistic, and relevant? Does it fit with overall organizational objectives?

**TIME-BOUND:** With a clearly defined timeline, including a starting date and a target date.

### References

<https://asana.com/resources/project-milestones>

<https://corporatefinanceinstitute.com/resources/knowledge/other/smart-goal/>

<https://www.linkedin.com/learning/improving-employee-performance/creating-appropriate-work-spaces?u=35674036>

<https://www.linkedin.com/learning/performance-management-setting-goals-and-managing-performance/process-considerations?u=35674>

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