



# INTELLIGENCE

ASSOCIATION OF GOVERNMENTAL RISK POOLS

## Strategies for Leading Remote Pool Teams

By Ann Gergen

**T**his year has been full of unexpected challenges for the pooling industry, but none seems as universal or impactful as the sudden shift from in-person office life to a remote working environment.

During this summer's [CEO Virtual Institute](#), we brought together 125 senior pooling executives to discuss important issues currently facing our industry. Throughout the event, attendees noted the remote work transition as an important area of focus. Some shared stories of their successes in managing the abrupt change. Others expressed frustration at where they've come up short.

Having led remote teams since 2009 (including as an executive for two public entity pools and a pooled reinsurer), I can share relevant insight directly from my professional experience.

This issue of *Intelligence* presents **seven strategies for managing remote teams on an ongoing basis**. However, it does not examine how to conduct specific, shorter-term initiatives virtually (e.g., strategic planning work, upgrading software, team-building exercises). These are important needs, but **you can't address them without first establishing and then maintaining an environment of active virtual team engagement**. Moreover, what works for one team or project may not work for another. That means your operational approach should be thoughtful and specific to each endeavor.

At the end of this publication, we've added [remote leadership resources](#) that might be helpful in the context of pool operations. We've also reached out to a variety of HR and IT professionals at pools for their experiences and recommendations. Their insights appear as comments in the sidebars.



*We've implemented a daily 15-minute team video call. These "scrums" are a way for us to chat as a team, talk about what we're working on, go over impediments and ask each other for help. These have continued even as OMAG has started to return to the office.*

—Kevin Sesock, CIO/Director of Technology Services, [Oklahoma Municipal Assurance Group](#)

*We started having brief weekly "huddle" meetings as a way to keep everyone up-to-date on what's happening that week or review events from the week before. We mix up the employee facilitators every month or so by having staff volunteer for a block of time. Our employees have also been very good about scheduling deliberate one-on-one meetings with other co-workers in an effort to stay current on unfolding events as well as to check in on how they are doing.*

—Jean Cole, Human Resources Manager/EPL Team Lead, [Cities and Villages Mutual Insurance Company](#)

*I always insist on keeping cameras on unless there is a personal or technical issue preventing the user from doing so.*

—Atul Poladia, Chief Information Officer, [Texas Municipal League Intergovernmental Risk Pool](#)

## 1. Centralize and simplify storage, access and sharing of all documents.

I suspect for most pools documents are already centrally stored and easily accessible to everyone. To accomplish work as an effective remote team, implement tools and procedures for document sharing and collaborative writing or editing (with appropriate permissions or controls when needed).

Without document sharing capability, you'll spend far too much time and energy on "manual" version control—e.g., sending out a group email for each document update, tracking who on your team is making edits, figuring out which email attachment of an important file is the "working" version, etc. That's a huge productivity drain, and it's easily avoidable with the right online office tools.

## 2. Embrace video calls.

One common complaint about remote working is that it lacks the interpersonal connection of office life. However, by making video calls a staple of your professional communication, you can get surprisingly close to the familiar feel of in-person interaction.

There are a wide variety of video platforms out there. My personal favorites don't require scheduled meetings and are integrated into other office tools. To be as effective as possible, making or answering a video call should be as easy as sending a text or making a phone call.

Regardless of what you use, once you've set up your video meeting tool, keep it open and set to "available" whenever you're working. This is the closest you can come to an open door policy in the remote world.

You can also use your video chat tool to replicate "management by walking around." Instead of calling or emailing people, video chat them—just like you'd pop into their office on the way back from getting a cup of coffee.

Making active use of video calls takes practice, but it's an important example to set in order to get a remote team used to this new way of connecting. And, of course, you have to be sure to answer incoming video calls too—just like you'd allow someone to pause in your doorway at the office. (That said, be sure to balance this with what I describe in #7 below.)

It also takes practice working through video to pick up on non-verbal cues, tone of voice and other audiovisual signals—both for people in general and for each of your colleagues individually. Even someone you know very well may present themselves a bit differently in a video interaction.

Don't get me wrong: I'm not suggesting you abandon email, chat messages or texts and move exclusively to video calls. Every form of communication has its own place in work life—for example, in some cases I like being able to carefully choose and edit my words before hitting "send."

Phone calls, though, feel thoroughly obsolete to me. On a video call, I can hear and see what people are saying. On the phone, I can't. In fact, I joked recently with a pool executive that I've come to really dislike phone calls. Then I realized

just how true my offhand comment was—the phone is now my least preferred communication method for work team interactions.

### 3. Schedule and keep one-on-one meetings.

Leading a remote team, I've found it useful to schedule weekly time with each person who reports directly to me. Half an hour is usually enough, although it depends on the person and the role.

Whether or not you held one-on-one meetings in your traditional office environment, they're important in a remote professional relationship. Such meetings give each person dedicated time on your calendar (which is probably more scheduled now than it ever has been).

A one-on-one meeting doesn't have to follow an agenda, although it certainly can. Use the time to overview the coming week, brief key decisions before going to the board, talk about a current member inquiry, or even just compare perspectives on what's important in the moment.

Even if you wouldn't normally meet one-on-one with direct reports every week, the combination of your (now highly regimented) schedule and physical distance is why I suggest this regularity. Think about it: You would easily spend 30 minutes informally with each of your direct reports in any given week in the office—grabbing lunch, talking in the hallway or comparing notes after a meeting. In the absence of those unscheduled opportunities, the only way to ensure one-on-one conversations always happen is to put them on the calendar.

Regardless of how busy you are or other interactions you have during the week, I suggest you remain dedicated to keeping the one-on-one meetings you set up. This sends a tacit message to your team about the importance you place on time with them.

### 4. Start the first interaction of each day with something personal.

This recommendation is a hard one for me to remember, even having worked with remote teams for over 10 years. I can easily default to an "all business" approach in a desire to be expedient and productive.

But, no matter the context of the call or meeting or how busy we are, I try to make sure the first interaction of the day I have with each team member starts with something personal.

It might be as simple as saying "How's your morning?" or asking about an evening activity I know they had planned the night before. If I have more time, I'll ask how their partner's new job is going or what book they're reading.

I'm sensitive not to pry into their personal lives, and I might transition fairly quickly into the work reason for the call. But I find just one minute spent easing into work conversation is helpful to keep everyone feeling connected. And, if I forget or jump in too quickly to the task at hand, I try to back up a step the next time I talk to that person.

*To keep office social life alive, we have a weekly virtual social hour where employees are not allowed to discuss work. Surprisingly, these go for two or more hours, when finally we have to kick people off. I personally have learned a lot more about my staff in the past five months compared to what I knew about them before the pandemic started.*

—Atul Poladia, Chief Information Officer, [Texas Municipal League Intergovernmental Risk Pool](#)

*We implemented a daily COVID email message for our staff that included operational updates, humorous memes, inspirational messages, contests, fundraisers for charitable organizations, and examples of what our employees and our members were doing well during the pandemic. We asked various employees to "guest author" some messages and found we had many talented writers on our staff. We have now morphed this message into the "Wednesday Weekly Wrap" so that it becomes institutionalized.*

—Laura Kushner, Human Resources Director, [League of Minnesota Cities](#)

*We had a virtual happy hour where we shared a "what you may have missed since COVID" presentation of all the major employee events that have happened during the pandemic: birthdays, milestone anniversaries, retirements, promotions, marriage and births.*

—Jean Cole, Human Resources Manager/EPL Team Lead, [Cities and Villages Mutual Insurance Company](#)

*Our expectation is that anyone can schedule a meeting with another employee if their calendar is marked as “free” during business hours. Employees are expected to keep their calendars up-to-date and block out when they would like focused time without being disturbed or have any other personal commitment.*

*TMLIRP is making a conscious effort to recognize that an employee might be a caregiver at home, and we need to respect that. There is active communication from top management to generate awareness around this topic, especially when kids are attending school virtually from home.*

—Atul Poladia, Chief Information Officer, [Texas Municipal League Intergovernmental Risk Pool](#)

—

*CIS's executive director has sent the message that staff should stop working at an appropriate time each day, and he's told staff he does not expect them to check emails after hours.*

—Janie McCollister, Human Resources Manager, [Citycounty Insurance Services](#)

## 5. Use and share your calendar.

In a remote environment, it's helpful for your whole team to make robust use of shared online calendars.

I advocate using the shared calendar for scheduling meetings as well as project work time. I set aside time on my calendar when I have focused work to accomplish and rarely schedule other meetings, respond to calls or reply to emails during these periods. The remote teams I've worked with often utilize the same strategy to block time. We think of this as the equivalent of shutting your office door—it's a signal to say “come back later, please.”

The shared calendar also operates as a default explanation for why someone might not be available to answer a video call. If I'm trying to reach a team member and can't, I take a look at their calendar to see what meetings they're in or what projects they've scheduled. This helps me decide whether to drop them an email instead, try them again later or by chat, or wait until their next one-on-one meeting. If the reason I'm calling isn't time-sensitive, I might check their calendar first to be sure I'm not interrupting more important work.

## 6. Actively demonstrate work-life integration.

I was recently with a group of pool staff who were chatting about their transition to remote work. Although no such expectation had ever been communicated, the employees said they felt as though they could never step away from the computer or be slow to respond to an email or call. They shared they were fearful their coworkers or boss would think they were goofing off or taking advantage of a remote work environment to binge watch TV.

Even if their fears were unfounded (or maybe self-founded), those concerns were still impacting when and how these employees worked. They reported feeling overwhelmed and unable to take time off, even though they knew doing so would help their stress levels.

Acceptance of work-life integration is essential for building an effective and trusting remote team. That's why, in a remote environment (especially one still in transition), it's imperative to actively promote and model healthy work behaviors. Using your shared calendar is an excellent way to do this. Whether it's a school event for a child, a visit to see an old friend or a dentist appointment, I advocate for putting as much on your work calendar as you feel comfortable with (remember, you can mark a meeting as “private”). I even put evening commitments on my calendar to signal I'm probably not looking for an answer to my afternoon question before the next morning.

This is an important and visible reminder that just because your team is working remotely does not mean they have to work around the clock. Everyone on a remote team should be transparent about start and end times in their days as well as where personal engagements and priorities might intersect with a workday.

It's of course important to be mindful that some people prefer to keep their personal appointments to themselves. These team members might benefit from setting more obvious work hours on their shared calendar so they can comfort-

ably step away from their computers and know the rest of the team won't be looking for them.

There are other ways to quietly demonstrate your own commitment to work-life integration that might serve as permission or encouragement to the rest of your remote team:

- Answer a team member's phone or video call while you're out for a walk or performing a household task. Tell the caller you're taking a break but are happy to talk for a couple minutes.
- Participate in a team call in your comfortable sweatshirt or T-shirt, especially if it's in the early morning or late afternoon on the border of work and personal hours.
- Let your dog bark or cat wander on-camera during a video call. Be respectful during scheduled meetings, but a pet visit during an unscheduled call is a good way to show home life and work life can blend in a remote environment.
- Miss a call or two. When you return the outreach, tell the caller you were out watering the garden, taking a power nap, or getting an afternoon cup of coffee.

## 7. Make it okay to say no. And say no.

A pool director recently recommended to me the book [Essentialism](#) by Greg McKeown. I'm only on the third chapter, but I already know I like the premise: It's acceptable, and even useful, to say no.

I've heard from many pool staff working remotely who say they're feeling the effects of "Zoom fatigue." Others report they feel as though the time and energy freed up by not having to commute has now been filled with more meetings, more training and more everything else.

I've certainly noticed an increased demand for meetings. When every conversation is happening online, it's easy to invite everyone to participate. But saying yes to every invitation means overloading your calendar and jeopardizing your work-life integration. It also makes it more difficult to keep all your one-on-one meetings and to take the time to interact on both a personal and professional level with your team. (Atul Poladia of the [Texas Municipal League Intergovernmental Risk Pool](#) notes: "Saying no applies even when you are working from the office, but it's exaggerated with remote work because now boundaries are further blurred.")

If you ever had a boss who arrived at the office really early or stayed late (and wordlessly seemed to convey an expectation that you did as well), you can appreciate why saying no is an important behavior to demonstrate. Again, your team needs your express and implied permission to meter their workload.

I've had to work, too, on saying no to email. When your whole team works remotely, they can sometimes feel compelled to overcommunicate by email, such as by copying others on informational items or asking for too much in-

## ADDITIONAL RESOURCES

[Driving Connection & Engagement in a Remote Workforce](#) (Gallagher; CEO-level QEI Patron)

[Techniques For Leading A Home-Based Team](#) (Future Point of View; VP-level QEI Patron)

[Navigating the new world of virtual work: Essentials of remote working](#) (PwC; VP-level QEI Patron)

[Tips to stay productive when working remotely: Ideas to build structure and new ways to work](#) (PwC; VP-level QEI Patron)

[7 Tips for Successfully Managing Remote Teams](#) (Jason Aten; Inc.)

[A Guide to Managing Your \(Newly\) Remote Workers](#) (Barbara Z. Larson, Susan R. Vroman and Erin E. Makarius; Harvard Business Review)

[Leading Remote Teams Effectively](#) (Heidi K. Gardner, PhD, Distinguished Fellow in the Center on the Legal Profession at Harvard Law School; Harvard Business Review webinar recording)

[Building and Leading High-Performing Remote Teams](#) (Arlene S. Hirsch; Society for Human Resource Management)

[Leading Remote Workers: The Coronavirus' Impact On Effective Management](#) (Jason Wingard; Forbes)

[How to lead a virtual team: 5 keys for success](#) (Josh Fruhlinger; CIO)

[3 Leadership Lessons for Times of Crisis](#) (Experience to Lead)

put about decisions they can make independently. You might need to coach a remote team about what is and isn't appropriate for group distribution.

These behaviors might happen for a perfectly rational reason: the desire to keep everyone in the loop and be respectful. But I've also experienced these things when remote team members are feeling disconnected. In a remote environment, overcommunicating might be a quiet signal that someone needs more attention from you or the rest of the team in general.



## OVERCOMING OTHER CHALLENGES

### Project Management

*When managing a team project remotely (especially at the launch), you have to keep building enthusiasm and support given that all the “fun parts” of it are gone—e.g., sitting in a room together, having lunch together, joking, putting everything on a whiteboard. You can do some of that online, but it’s not quite the same. Microsoft Teams is helping us keep track of projects, and holding biweekly meetings is helping keep some things structured.*

—Laura Kushner, Human Resources Director, [League of Minnesota Cities](#)

### Remote Work Preparation

*Start developing your mobile-first strategy as soon as possible—maybe not for this situation but for the next one. For years before COVID-19, our discussions were always around a “smoking crater” scenario (e.g., a tornado knocking our office over) and building in robust business continuity through a mobile-first, cloud-first strategy. We never envisioned we’d be implementing our scenario with the building still standing and habitable, but here we are. And, even though the shift to work-from-home was relatively smooth, it’s exposed a number of other issues we need to work hard to address: continuance of paper processes, distribution of IT assets, etc.*

—Kevin Sesock, CIO/Director of Technology Services, [Oklahoma Municipal Assurance Group](#)

*Be certain your employees have the necessary tools to do their jobs remotely. For those not used to working from home, some of the basics need to be met initially. Fortunately for VRSA, we had just implemented a new phone system that had fantastic capabilities for remote workers and set up a “softphone” for them to receive calls at home as if they were in the office.*

—Tina Stevens, Director of Human Resources Services, [Virginia Risk Sharing Association](#)

### Flexible Work and Leave Time

*We recently reminded employees they might want to use the federal and Oregon’s COVID leave along with a flex schedule (“windowed” work) to manage the Fall 2020 school term. Due to travel restrictions and concerns, we’re also allowing staff to accrue up to one week above our normal vacation cap.*

—Janie McCollister, Human Resources Manager, [Citycounty Insurance Services](#)

During times of transition from in-person to remote operations, many of you have introduced other strategies to lead effectively and connect with your remote teams. I've heard about weekly all-staff meetings or emails to share information, virtual escape rooms and scavenger hunts for team building, the importance of enjoying virtual coffee or happy hours, and more.

Just as with any other leadership skill, guiding a remote team takes daily commitment to try, even if some days you aren't quite as effective as you'd like to be. Experimentation is key—every team has its own dynamics you have to explore and address. I've introduced and discontinued many strategies over the last ten years, and I expect to continue doing so.

If you have discovered other useful methods for remotely guiding and interacting with your colleagues, please [let me know](#). As we find our way in this new environment together, we can share ideas and tips to make all pools more collaborative, effective and informed.

## About the Author



**ANN GERGEN** oversees operations, governance functions and member service delivery for the Association of Governmental Risk Pools. Ann routinely communicates and collaborates with the more than 200 pools that participate in AGRiP and their service providers.

Ann has 25 years of direct public sector experience in local government management, emergency services, risk management, primary and reinsurance claims, and pooled insurance services.

Ann is a recognized resource in strategic management and operations of public entity pools. She sits on several boards of directors, holds a master's degree in public administration, and is an attorney licensed in the State of Minnesota.

### ADDITIONAL CONTRIBUTORS

- Jean Cole, Human Resources Manager/EPL Team Lead, [Cities and Villages Mutual Insurance Company](#)
- Laura Kushner, Human Resources Director, [League of Minnesota Cities](#)
- Janie McCollister, Human Resources Manager, [Citycounty Insurance Services](#)
- Atul Poladia, Chief Information Officer, [Texas Municipal League Intergovernmental Risk Pool](#)
- Kevin Sesock, CIO/Director of Technology Services, [Oklahoma Municipal Assurance Group](#)
- Tina Stevens, Director of Human Resources Services, [Virginia Risk Sharing Association](#)



The **ASSOCIATION OF GOVERNMENTAL RISK POOLS** is a multinational organization for public entity risk pools with over 200 members from the United States, Canada and Australia. By providing support in the fields of education, intelligence, advocacy, networking and best practices, AGRiP energizes the power of pooling, making member organizations more effective, collaborative and informed.