



Career/Life Alliance Services, Inc.

How will we communicate?

The purpose of this exercise is to discuss how your team communicates and agree on some best practices.

- Use the questions to get the conversation going. Feel free to ask more or different questions. Discuss what's working, and what can be better.
- Modify the document based on your conversation. The content here is just a suggestion!
- Save this document on a shared drive and update it as needed. (Remember to invite your team to comment and collaborate!)

What are our expectations for response times? Are they different depending on who's communicating? Why or Why not?

In the following chart, please note:

- Place an X on the channel you prefer to use for each type of communication
- List your preferred response times for each channel

Channel	Manager to Team	Team to Manager	Team to Team	Response Time
Email				
IM (Skype, SMS)				
Voice (phone, Skype)				
Video				
Calendars/Invites				

How will we work together and communicate when something is urgent?

Do we agree/disagree with these "best practices"? Can we think of others?

- Be specific about how quickly we need a response.
- Not use "ASAP" or "At Your Earliest Convenience" because these phrases mean different things to different people.
- Use multiple channels to reach out (call, email, text, and Skype).
- Let the sender know when they will hear from us.

Email: When and how is it most useful? What are our best practices for using (or not using) it?

Useful For or When	Not Useful For or When
<ul style="list-style-type: none">Asynchronous communicationSimple, routine requests and information	<ul style="list-style-type: none">Discussing complex topics or issuesTo give bad news or express feelings

Do we agree/disagree with these “best practices”? Can we think of others?

- Use subject lines with keywords
- One topic/email
- Be clear with requests.
- Avoid long, complicated chains
- Don't change the topic in the middle of the chain
- If you are discussing/or reviewing a document – use document collaboration tools instead.
- If it's a long/complicated discussion, change the channel
- Reply all (if appropriate) to keep everyone in the loop
- Include only the people who need to be part of the conversation
- Use auto respond when you are out of the office and provide back-up contact
- Read carefully and respond appropriately.

Instant messaging (Skype, SMS): When and how is it most useful? What are our best practices for using (or not using) it?

Useful For or When	Not Useful For or When
<ul style="list-style-type: none">Informal conversationAsking a quick questionStaying connected during the day	<ul style="list-style-type: none">Discussing complex topics or issuesInformation that needs to be archived or saved

Do we agree/disagree with these “best practices”? Can we think of others?

- Limit “chatter” and “interruptions” because IMs can be distracting
- Use emoticons, because they help clarify tone and *emotion*
- Sign into Skype to communicate throughout the day
- We will greet each other via Skype (or in person) in the morning to say hello and discuss any open issues.

Voicemail: When and how is it most useful? What are our best practices for using (or not using) it?

Useful For or When	Not Useful For or When
<ul style="list-style-type: none">You are on the go and can't typeAdds "tone of voice" to the message	<ul style="list-style-type: none">Discussing complex topics or issuesInformation that needs to be archived or saved

Do we agree/disagree with these "best practices"? Can we think of others?

- Speak slowly and avoid rambling.
- Be clear about the request – "I'd like to know X about Y," not "call me when you have a minute"
- Respond as requested to prevent "phone tag"
- Update your own voicemail message when you will be out of office.

Shared Calendars: What are our best practices for using shared calendars?

Do we agree/disagree with these "best practices"? Can we think of others?

- Keep calendars up to date
- Set our outlook calendars when we are not available
- We will be accessible during these business hours:

Meetings: How are different meeting types useful/not useful?

	Useful For or When	Not Useful For or When
Skype Meetings	•	•
In-Person Meetings	•	•
All Team Meetings	•	•
Check-ins	•	•

Meetings: What are some of our best practices for Meetings?

Do we agree/disagree with these meeting rules? Can we think of others?

- The meeting owner will provide an agenda prior to the meeting so we can come prepared
- Don't mute phones
- Everyone uses video
- Everyone contributes
- Begin at 5 after the hour so people have time to transition
- Keep meeting notes in OneNote
- We will let the team know if we are running late, or unexpectedly unavailable
- We will avoid using meetings to share the "status" of projects and to-dos.

How often should we have all team meetings?

How often do we need quick check-ins?

Teambuilding: What are our best practices working together as a team?

Do we agree/disagree with these "best practices"? Can we think of others?

- We will list a backup team member when we are out of the office
- We will seek out and participate in trainings that will help us improve our team operations, especially technology and competency building
- We will hold Monday morning check-in meetings to discuss the week ahead, answer questions, and connect as a team.
- We will use video for our meetings no matter how bad our hair looks!

Going Deeper: Here are some additional questions to consider with your team.

What communication channels do we use most/prefer and why?

Are we relying too much on familiar technology when other options might work better? Why?

What technology would we like to use more and why?

Who would be our "tech ambassador" and champion our use of new tools and processes?

How might we adjust meeting times/tools/practices in order to be improve team productivity and communication?
