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# Remote Work for Design Teams

Learn the best practices for running a remote design team and discover how designers can play a leading role in helping all teams collaborate better together even when working apart. This book was written by our team at InVision, a fully distributed remote workforce since 2011. Uncover how to foster a culture of collaboration, processes for remote design reviews and sprints, as well as leadership and management skills for remote teams. This book explains how to adapt the creative process into a remote environment, from ideation to implementation, and offers practical advice for design leaders to keep teams motivated and engaged without being under the same roof.

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**Abby Sinnott** is a managing editor at InVision, where she tells the stories of exceptional design teams collaborating around the world. She has worked remotely as a writer and editor contributing to numerous publications for over a decade, and considers the freedom remote offers a true creative and lifestyle advantage. A fiction writer at heart, she's hard at work on her second novel in her spare time. A New York native, Abby has lived in California, Spain and London, England, where she currently resides with her two daughters.

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program, and assisted in the development of the USAA's Chief Design Office. He recently joined InVision for a range of roles. Greg lives in the Pacific Northwest with his amazing wife and writes occasionally at his personal site [Airbag Industries](#).

## Acknowledgements

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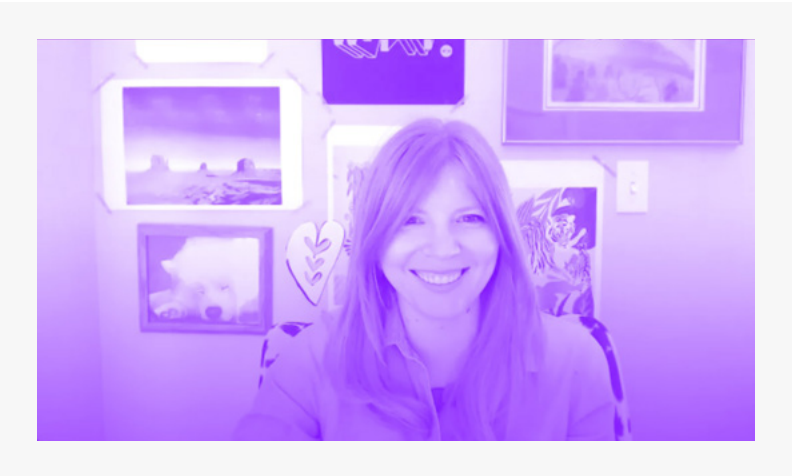
Creativity and collaboration have long been colored by iconic images evoking a high degree of physicality—the team huddled together in a messy studio space, collaborating with expressive gestures and visual props, like sticky notes or whiteboards. The air is electric, the ideas fly, and the flow unstoppable. It’s a deeply appealing image, even aspirational, touching on core aspects of the human condition—the desire to connect and create.

For designers, the pull of this image can make the transition to remote work jarring at first. Much of the user experience we associate with creativity and collaboration are now different in a distributed environment, from the physical space of work to the routines leading up to it.

The good news is that neither creativity nor collaboration are weakened by distance—merely altered. And the conditions that make them possible remain the same.

Successful collaboration still depends on trust, psychological safety, and the open exchange of diverse ideas, perspectives, and expertise. Similarly, the creative process doesn’t recognize the boundaries of a studio space or office building. It still involves the same age-old cycle of research, ideation, prototyping, testing, and iteration. The difference is that it requires new tools to replicate certain activities in a digital environment.

But while remote work doesn't change the fundamental nature of creativity or collaboration, it does more quickly amplify flaws in culture, process, or leadership that already exist. "The physicality of us being together in the same space can be a cheat sheet," says Stephen Gates, head design evangelist at InVision. "What remote work does is show a lot of your organizational sins if you haven't been doing the right thing."



Emily Campbell on building trust in a remote environment ([Watch online](#))

Teams that lack trust or psychological safety will need to be more deliberate about building relationships and creating safe space for collaboration. Silos that may have been softened by co-location will concretize in a remote environment unless teams are proactive about being inclusive. And teams

that previously navigated the product creation lifecycle by happenstance will discover the need to define and advocate for a shared creative process more explicitly.

In this sense, the transition to remote work isn't just a challenge to be solved—it's an opportunity to improve. Remote work can help strip away the cover and camouflage of problems that were previously concealed in an office environment.

The teams that take the time and energy to address these problems will emerge all the better for it, and discover a host of additional benefits besides.

This is something we've learned firsthand at InVision.

Since our founding in 2011, InVision has grown into one of the largest fully distributed companies, with more than 700 employees around the world and zero offices anywhere. Despite the remote nature of our company, our teams have done some of the best and most rewarding work of their careers in this environment. And over years of scaling a remote company, we've learned that for every challenge to be solved there is an equally compelling upside to be celebrated.

The ability to look beyond the boundaries of a major metro area to hire talent from anywhere has enriched the character of our teams with a global perspective. It's also provided us

with the opportunity to work with design teams around the world, from Seattle to Singapore. The improved work-life integration has enabled many of us to be more engaged in both work and family life, rather than having to choose between one or the other. And the intimacy afforded by being beamed into the homes of colleagues has resulted in some of the deepest working relationships of our careers.

It's for these and other reasons that InVision has come to believe in remote work as an important advancement in the way people work. While that doesn't mean that it will be right for all teams at all times, investing the time and resources to develop the capability to work remotely is worthwhile for any team or business.

Of course, as we now know, the ability to work remotely is not only a worthwhile investment—it's also a necessary one.

## **The turning point for remote**

At the time of this writing, much of the world is grappling with the effects of the Covid-19 pandemic. Businesses and governments everywhere are closing down offices and moving to remote work as a social distancing measure, to "flatten the curve" of the infection rate. This serves as the backdrop for what is emerging as a historic moment in remote work

history—an exodus of workers from the traditional office to a home office on a scale that’s never been seen before.

The challenges of suddenly and unexpectedly transitioning a workforce to a remote work scenario are highly complex and unprecedented. In this environment, teams don’t have the luxury to develop a remote culture gradually over the span of years. Some may not even have the basic tools for remote collaboration in place. There may be strict regulatory requirements and the security of hundreds or thousands of employees to consider.

Every company will have unique challenges depending on their individual context, and solving these challenges will require solutions that come from within.

But there are some lessons we’ve learned about remote work that would be valuable to any team. These lessons primarily relate to a specific topic: How to foster collaboration and creativity in teams when working remotely. Many of these lessons were gleaned from our years of experience scaling a remote company and building digital collaboration software. Others come from our firsthand experience working with remarkable design teams around the world.

We’ve written this book to help share some of those lessons, and alleviate some of the uncertainty about remote work.

But we also hope this book excites and energizes designers about the possibility of being of service to their teams during this trying time. With their unique specialization in driving cross-functional collaboration, designers can serve an invaluable role in keeping their teams and businesses connected, creative, and collaborative—despite the physical distance between them.

As Tim Brown wrote in his seminal book *Change by Design*, “Only gradually did I come to see the power of design not as a link in a chain but as the hub of a wheel.”

Designers are connectors, collaborators, and facilitators. They can bridge the gaps between disciplines, empower diverse voices, and break down silos. They accomplish this using age-old tools of the creative process: research, empathy, problem immersion, brainstorming, ideation, prototyping, testing, and other best practices. These practices are powerful tools and not dependent on co-location. If anything, learning to do these activities remotely strengthens creativity and collaboration by enabling the inclusion of more diverse viewpoints, not just those in the same room.

So even as the world moves apart, design has an unprecedented opportunity to bring people together.

## **Further reading**

[The 3 problems everyone has when first working remotely \(and how to solve them\)](#)

[12 steps to eliminating remote work distractions](#)

[How Creative Market's remote team launched a new product in 6 months](#)

[The 9 best online collaboration tools for remote workers](#)



## Chapter 2

# Creativity and collaboration

Translate design practices for remote work

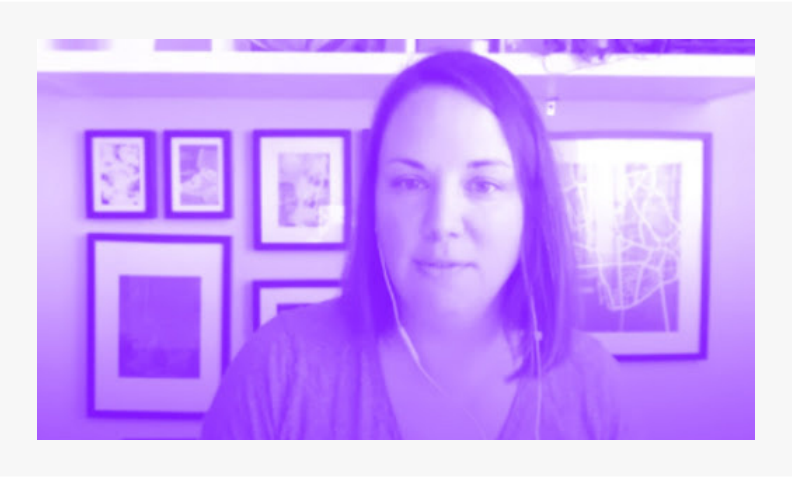
By Greg Storey



**Editor's note:** Though many of us find ourselves working remotely for the first time, Greg Storey has been at it for more than a decade, leading large, remote design teams at respected organizations like IBM, USAA, and Happy Cog. Greg has loads of expert, actionable advice on how to increase creativity, collaboration and leadership when teams aren't co-located. The next two chapters are written from his unique point of view.

Productivity, agility, collaboration, innovation; none of these things are tied to a specific place. They are functions of people and teams. This is important to call out because at this time there are a historical number of companies and organizations being disrupted by the sudden requirement to change their place: from the office, lab, studio, etc. to the home.

Think about how many design job listings require a move to a city or region because the leadership can not conceive how to be productive, agile, and innovative unless members of the team are sitting, literally, right next to each other. Perhaps because they know of no other way, but most likely because of their pre-existing bias against distributed teams.



Rebecca Kerr on remote collaboration ([Watch online](#))

After my years of experience in leading remote teams (and otherwise), I can tell you that working remotely doesn't have to be a disadvantage. Yes, it takes getting used to doing things in a different way. Some tasks take more time and consideration but distance does not have to impede on your team's abilities to create and collaborate with others. Remember, outcomes come from people, not places! You and your team can be just as successful working remotely (perhaps more) if you reshape your team's thinking, processes, and frameworks without having to lower expectations to leadership.

As we know, what works for me and my team may not work for you. For that reason, the purpose of this chapter is to provide a set of different perspectives; consider it a set of revised ideas

on how to run a successful distributed design team.

## **Communicate with reach and repetition**

Communicating at work is often challenging and working remotely makes it harder. Without a plan for how your team will communicate internally and externally to the rest of the company, a remote team is always one Slack thread away from turning into *Lord of the Flies*.

It doesn't take much for the volume of messages in Slack (or Teams) and email to pile up. To top it off, most people don't care enough to practice proper etiquette when communicating digitally.

My personal favorite is the three-foot-tall email-chain that's been going on for weeks until you're suddenly CC'd with zero context and only a "FYI" at the top. And yet you're expected to digest the "conversation" and make a quick decision.

My next favorite: The impromptu question in Slack that generated a twenty-minute exchange of messages, emoji, and animated GIFs that you're brought into with a simple @gregstorey followed by "scroll up." Neither of these exchanges are positive or an effective way to communicate, but they're

done all the time.

It's important to talk about communication needs and requirements as a team because you need to develop some empathy for what it's like to be at the end of that sparkling trail of animated 90's memes and weeping smiley faces.

Likewise, your team should have a communication strategy for how to communicate with your partners, your line-of-business, and the company-at-large. If you're working for a large company it's highly likely that a one-and-done strategy for communication will fail. Take a page from social marketing; map out what communication channels (the communication platforms available to you) you need to use to reach your audience successfully. And then determine what repetition (if any) you need to employ to get that message across to the most people.

In addition to these ideas, Jason Cyr, director of design transformation at Cisco, created [a list of ways to improve remote communication](#) that are worth considering. Here are a few suggestions from the list that I think are fundamental:

**Facilitation is key** Every meeting, regardless whether it is remote or in person, should have someone appointed as the facilitator/chair/leader (not necessarily the organizer). This is one of the most important things you can do to ensure a

successful meeting as they will be the person who makes sure all the other items below are considered.

**Act differently** Do you remember when you were a kid and you went to someone's house for dinner? You knew that you were meant to act differently and be on your best behavior. The same idea applies here. Recognize that in a remote meeting situation you need to act differently than in an in-person setting. Help the facilitator, don't dominate the conversation. And help make sure everyone is heard or invited to be heard.

**Ensure a quality audio connection** In low-bandwidth situations ensure that you connect to the meeting audio with your cell phone or landline so that you always have a stable audio connection. Be diligent about muting if you are in a noisy location (seems obvious, but not always put into practice).

**Turn your video on!** A lack of interpersonal chemistry and ease of multi-tasking are two things that kill remote meetings. Ensuring that everyone's video is on and that you're not checking email, Instagram, or ordering on Amazon helps to solve both.

**RACI** The more people on the call, the harder it is to make it effective. Use the RACI (Responsible, Accountable, Consulted, Informed) matrix as a way to evaluate who needs to be in the meeting versus who needs to be simply consulted beforehand and/or after.

**Prepare, prepare, prepare** The organizer and the facilitator should put some extra effort into the planning. Test tools, dry run any activities, and create breakout groups ahead of time (if needed). Try to identify things that could fail and have a plan B in place.

Without successful communication your team is set up to fail. It's right up there next to working electricity and internet access in terms of necessities for a successful remote team. Invest the time to discuss this as a team and devise your communications plan. Don't leave communication protocol up in the air.

## **Making creativity explicit**

When co-located, key stages of the creative process emerge organically. This can be as simple as stopping someone in the cafeteria to show them a new user flow (testing), to jotting down an idea for a colleague on a piece of printing paper (ideation).

In a remote environment, all of these activities remain just as critical as they are in person. But achieving them requires being more deliberate about aligning, documenting, and communicating your process with others.

Stephen Gates, head design evangelist at InVision, describes this need as “putting structure” around creativity:

“Remote work shows you the flaws in your process and culture,” Gates says. “That’s why a lot of the more mature companies are able to do it more easily. They’ve spent the time to be more deliberate about how they work—for brainstorming, process, running a design critique, coming together as a team or working apart. A lot of teams do this stuff mostly through happenstance, as opposed to saying, ‘This is the way we’re going to work.’ If you look at the hallmark of high maturity teams, they are much more deliberate about this.”

Structure and creativity are not words you see used together often, but people—designers in particular—work best when a structure is put in place. And the “happenstance” that Stephen mentions? If left unchecked for too long in a remote setting you’ll learn a valuable lesson in what happens when you leave too much decision making to a designer. Manage your team’s process with intent, from start to finish.



Stephen Gates

Listen Online: [Putting Structure Around Creativity](#)

## Fostering creativity, building designers

To deliver dependable, successful design outcomes, leaders have to keep their teams curious, creative, collaborative, energetic, and always empathetic. It might take a bit of “plate spinning,” but you’ll end up with a productive team that delivers quality work. A primary responsibility of a design leader is to create an environment that fosters creativity and divergent thinking that takes physical and mental forms. Design teams often surround themselves with artifacts from all types of design: posters, desk accessories, LEGO, Funko figures, books, and furniture. They end up with a communal inspirational space that gets them into the right frame of mind in the morning and continues to inspire them throughout the day. Other “decor” comes in the form of artifacts of their work—from a journey map made of Post-It notes to nearly finished work printed on gigantic, nine-foot plotters. It’s not hard to be inspired in these spaces, but they are hard to replicate for a remote team. Even if you give everyone the same super motivational desktop image it doesn’t come close



to having the same impact as being surrounded by physical things that inspire great work.

Without the typical surroundings of the design team space, fostering creativity remotely requires thoughtful planning and ideation. Thankfully our profession comes with a number of tools that we can use to create new experiences; we just need to turn that inward and come up with activities that work within the constraints of remote work. Here are a few ideas to start:

**Make time for design:** Like show-and-tell that we all used to do as kids, create dedicated time per week for everyone to share at least one thing pertaining to inspirational design (or even just cool things that they read, saw, or did recently). It could be anything from someone's UI portfolio, a podcast, a new typeface, a TED Talk, or an article in the latest issue of *Eye Magazine*. Take turns introducing your inspirations, who is behind the work, and why it inspires you or why you think it's cool. Stretch your designers to present these things as if it was their own work. This helps them develop the ability to observe and interpret the work of others, create their own perspective based on rationale, and reflect on the experience.

**Eight-hour design sprint:** How often do we get to put our own tools to use for things we'd like to see out in the world?

Set aside a day to do a quick design sprint to create a new process or tool to help your team better collaborate with your partners or create a new service to support a different area of the business. The designers at Home Depot call this "one-day problem framing."

**Steal like Austin:** Speaking of taking pages, let's grab a whole handful from Austin Kleon's book *Steal Like an Artist*. A core message of the book is on stealing from the artists and people who inspire you. However, instead of simply stealing their style, dig into that person's history and find what inspired them. Learn how to blend your own sources of inspiration into the muse that powers your creativity.

**Side note:** Kleon's book is the perfect selection to read and discuss as a team. It's a quick read and each chapter provides not only inspiration but activities to complete and share with one another. Austin has two more books, *Show Your Work!* and *Keep Going: 10 Ways to Stay Creative in Good Times and Bad.*

**Weekly design challenges:** Put aside 10 minutes at the start of your weekly team meeting for a quick design challenge. Have fun with it but find ways to incorporate different design thinking activities combined with new constraints to keep the challenge fresh.

As creativity comes in different forms, consider stepping outside of your existing design practice, company, and

industry to look for new ideas. Examine how creativity has an impact on other industries; and then, take those learnings and build new exercises. The important thing is to prioritize creative exercises in your team's activity. And if it should happen outside of your efforts, throw every ounce of support on it you can provide.

## **Ideating in a remote environment**

I had the pleasure of working for a few years on the IBM Design team in Austin, Texas. If you haven't yet, I encourage you to watch [\*The Loop\*](#), an InVision film on the design program at the heart of IBM's design-lead transformation. It tells the story of the Herculean task given to a small team to change how IBM solves problems for its clients and creates new products and experiences that are firmly grounded in user-centered design principles. It's a classic David and Goliath story, but more importantly, you'll get an inside look at IBM's Austin studio space that was custom designed to provide the best experience possible for design-driven activities.

There are four spaces: Blue, Red, Green, and Yellow; these can also be split into sub-spaces: A, B, C, and D. Sixteen teams of up to six persons can work simultaneously in relative comfort. The entire space has a top-mounted track system designed to accommodate rolling whiteboards that are approximately

four-feet wide and seven- feet tall. To a designer it's a wonder of the modern world and I have yet to see another system like it. My oh my, if those whiteboards could talk. They would have thousands of stories about designers testing hypotheses, pivoting after user research pointed to a different need, and the insane amount of ideation generated to solve for that need. It was hard not to be creative in that space. Whether the space was set up for one or sixteen spaces, it felt "design-y" and it definitely helped people change how they went about working to create better user experiences.

And then one day you go from that amazing in-person experience to trying to do the same thing sitting behind a computer screen with an active webcam. As much as I'd love to make the online experience better, one of the most challenging activities in a remote environment is also the one that's easiest at a place like IBM Design in Austin—ideation.

In a physical space, ideation is much more accessible. Everyone knows how to drag a marker across a whiteboard, or jot an idea down on a sticky note. And yet in a remote environment, this is usually where teams first stumble.

To successfully ideate remotely, it's important to approach this as a "user experience" challenge. What is the purpose of ideation? It is to make sharing and communicating ideas as accessible, frictionless, and fast as possible. We use

whiteboards because everyone knows how to use them. Sticky notes work because they're small and disposable, forcing us to limit what we jot down and making ideas easy to discard.

Yet digital collaboration software is often the opposite of accessible, fast, or frictionless. Most collaboration software is purpose built to solve complex technological and communication problems at scale. They're full of distracting and intimidating features. And they optimize for orderly, organized information sharing.

Digital ideation tools should be simple, accessible, and allow for unstructured creative freedom. Fortunately, there are digital tools now available that seek to replicate the experience of whiteboarding including InVision's own tool, [Freehand](#).

Freehand was created to solve for the inclusivity and speed of in-person ideation sessions, allowing for real-time collaboration via a simple online canvas. Teams can sketch images, type out notes, and review designs together, just like they would on a whiteboard. The toolset is intentionally limited, making it easy for any person to contribute (no matter their role).

**Side note:** The first time I saw Freehand was at InVision IRL 2018, an "in real life" internal company event where we all

get together for a few days to break bread, have some fun, and prepare for the coming year. I was a design executive at USAA at the time and was there to tag along with my boss, Mariah Garrett, chief design officer at USAA. She was invited to sit on a client panel. After the panel was over, we sat through the next presentation given by the CTO. The entire presentation was conducted on this weird, sketchy digital whiteboard where other people contributed in real-time with drawings, commentary, and animated gifs. It was one of the coolest presentations to date and at the end of it, the CTO introduced Freehand to the rest of InVision. He provided a URL for everyone to use to log in and add to the board. As people logged in, you saw cursors of different colors fly across the screen and start creating. And that's why I love this tool. Just like in a real-time space, people can jump in and start adding to the work.

Here at InVision, Freehand has become our default for whiteboarding, brainstorming, sketching, wireframing, and other ideation activities. Everyone in the company—from product to data science, to marketing to HR—uses it. It's the core tool in everyone's quiver because it mimics the whiteboard so well.

Your mileage may vary, but the important note here is to find a space or your team to ideate quickly and often. With all of that fostering of creativity, you're going to need to find a way for

your designers to use it.

## Performing design critiques remotely

After many years in business, InVision product teams are still evolving our methods for weekly design critiques.

While getting used to doing these things remotely may take some time, there are a few positive outcomes. At InVision, each design team gets one hour a week for critique. Time is divided equally depending on the number of projects that are flagged as needing review for the week. Critique sessions are facilitated by the design lead of each team and partners in product management and engineering are invited and encouraged to participate. All of the work to be reviewed is placed in a Freehand (read Ideating in a remote environment earlier in this chapter) along with a uniform outline the designer uses to provide constraints for feedback:

- What I am sharing today: (please include the actual problem you are seeking to solve with this work)
- The work is at the stage of: (e.g., discovery)
- The constraints I am dealing with are: (e.g., I only have two weeks, we don't have x data available, etc.)
- I am looking for the following feedback: (be as detailed as

necessary)

During the critique, participants are encouraged to focus on providing feedback and asking questions. We have tried more formal frameworks in the past, but they ended up taking longer without improving the quality of the sessions and didn't justify the additional time. InVision designers prefer to use Freehand to present their work because if a new idea comes to mind, the team can quickly jump in and work on it in realtime. Having been a part of critiques in the past I can tell you that being able to quickly sketch out ideas in the same space as the work being reviewed is truly valuable for team ideation.

Everyone attending the critique is required to have their cameras turned on at all times. This helps to show that people are engaged, but more importantly it conveys the tone of the feedback and provides a sense of shared vulnerability. Providing feedback through voice alone comes off as absent of empathy. And I'm going to show my age here, but what are we—*Charlie's Angels?*

Now it gets better. Sessions are recorded and shared out afterwards which lets the designer focus more on interaction with the people providing feedback and ideas during the session (rather than trying to document everything).



If there is one aspect about working remotely that's super positive, it's that right there: the ability to focus on interacting rather than trying to transcribe in real time.

Note: The design teams tried using a dedicated note taker in the past but reviewing the video leaves nothing up for interpretation.

Other considerations:

- The leader should set the tone for the session when they log in. Focus on making the interaction productive and fun during the review. This event is super important to design team culture. The key is to provide enough process, but not to the point of rigidity.
- It's easy to be less personable when you have a screen and camera in your face. Lead with empathy: How are the people presenting feeling? Be personable and positive. Be a reminder that you're all there to critique the work, not the person.
- For a team working remotely for the first time it will take a bit of trial and error to find the right virtual experience. It's important to remember that what works for us at InVision may not be the right fit for you. Charge your team with

exploring new ways to host a better critique and have fun with it.

## **Ensuring visibility of the work**

It's often easy to know when you're near a team of designers because the walls are typically covered with their work, everything from hundreds of sticky notes to print-outs of nearly finished designs of an application flow. These are the artifacts that business folks tend to gravitate towards because it provides evidence of their money being wellspent. It's vital that when switching to a remote environment your team doesn't lose this visibility. The last thing you need is to suffer from you and your team being out of sight and out of mind. Without the walls to showcase design, you still need to remind the company of the capabilities, outcomes, and value that design provides.

As the leader, ensuring the visibility of the work will likely take extra effort on your part because you will need to take the work to them (there are no hallways in virtual space). Not unlike drumming up support for an internal initiative, getting design in front of business partners and executives requires creative thinking and promotional moxy. You need to communicate to your stakeholders, partners, peers, and executive sponsors. Also consider including the following groups: marketing, public

relations, risk, compliance, and legal.

**Newsletter:** Nothing is more to the point than an update delivered straight to stakeholders and executives. A good newsletter should be visually interesting and editorially provocative. Try to tell concise stories that link to more detailed versions, full prototypes, or design presentations. Be careful not to include everything in email; if it's too long and not scannable people will stop opening it. Share your longer stories by publishing them to your company intranet or blog. This will also allow you to link to the stories and promote them in other channels like Slack.

**Boards:** InVision teams use Boards to do everything from provide a “war-room-like” space to showcase finished work in a case-study format. Design teams use this to collaborate on work with their partners (engineering and product) and across various areas of the business. The product makes it super easy to pull together group visuals, add comments, etc. in a way that's reminiscent of the walls that you're used to covering with work. It's a nice non-PowerPoint option to help socialize a team's activity.

**Executive reports:** Most executives leave the office on Friday with a weekend packet of reports, articles, etc. to read and review. Each month, the design directors of USAA's Chief Design Office prepare a 3 to 5 page brief on their team's

activity for the month. The briefs are just that, short stories of the work completed with images showcasing the design team at work and the work itself. Each team brief is collected in a larger report for the entire line of business and sent out to all relative execs. Not only does this keep the executive in touch with the design activity of their product line(s), but also the activity across the entire business.

**Playbacks:** A wonderful practice from IBM Design is the “playback,” a type of meeting/presentation between the team, stakeholders, and executives/clients to keep everyone in sync. A playback is a reminder of the team’s current mission, priorities, a review of the current work, what the team learned, and it ends with a review of the next steps. Playbacks are conducted any time the team at large needs to get in alignment, which is often after the design team has finished a phase and is about to move onto the next.

**Open house:** Just because you’re remote doesn’t mean you can’t host an event. While he was global head of design at Citi, Stephen Gates used to host an open house on Friday afternoons. Designers volunteered to show the work they had accomplished for the week. Anyone in the company was openly encouraged to attend as part of an effort to teach what his design program is capable of doing.

No matter what combination you end up using, it’s more

important that you're able to share and distribute your team's work on a regular basis (not too frequent or interest will eventually drop, but enough to keep visible). Remember that repetition is super important. Don't leave this vital communication up to a single distribution method. [Post links to prototypes in Slack.](#) Add the links to your team's Confluence page. And add Trello cards to "Review Design Activity" in various backlogs. Get creative and be seen!

## **Develop better collaboration with engineering and product management**

There are plenty of articles online with ideas for collaborating with our partners in engineering and product management. Working remotely can make collaboration a bigger challenge, but it also presents an opportunity to understand your partners' teams and needs. For all of the advice design passes around for developing empathy for others, it's not often practiced internally. We're not taking the medicine that we prescribe.

From my experience, it's always illuminating to work with your engineering and product partners to discover what assumptions they have of design and of their roles. I once worked with a product manager who worked under the assumption that most of the design role responsibilities

belonged to them. It took me a few months to figure this out, but when I did, I had an understanding of why it was so challenging to work with them. When I had this ah-ha moment, I wanted to scream—not at them but at me. How did I go so long without going through some simple activities to understand their perspective and vice-versa? What a gut punch. I didn't feel very much like a design leader that day.

To build an effective, collaborative relationship we first need to listen and understand what makes our co-workers tick, what's important to them, what they feel is important to us, and how their work is measured by the business. Likewise, they should have the same information and the same understanding about us. Set aside time between you and your collaborators to work together and run through discovery exercises so you can build empathy for each role. Keep doing this until you reach all of the major roles that you need to work with. Share these techniques and get more people in your company developing empathy for their partners.

Once we have a collective understanding of one another, then it's possible (and very powerful) to co-create how we should work together. We can build work agreements (social contracts) that speak to how each role prefers to work. Together we can reshape our processes to be inclusive and thus set up the conditions for real collaboration. And we can do all of this while helping each other reach our objectives as a

team and as individuals.

## **Speaking of collaboration, let's talk about facilitating remote workshops**

As time goes on in this new world, so must design and collaboration. Our profession has come a long way in demonstrating that we can provide value to the business. Working remotely or not, we have to continue that momentum. One of design's strongest offerings is the discovery process to test new product or service ideas quickly and at fraction of the cost of a full engineering team.

Facilitating workshops remotely may seem difficult, but in my experience it's really the same amount of effort and emotional energy that are focused slightly differently. Remember, design is not a function of a place and design-led workshops fall directly within that statement.

You will still need to set up the "room" and make sure there are enough supplies. Invitations have to be sent out and followed up to make sure folks are going to participate. And yes, there will be that person who is late and needs help finding the right link. [I wrote a separate guide on facilitating remote workshops available on the InVision Inside Design blog](#) complete with a view of a sample workshop setup we use in Freehand.

I can't stress enough how important it is that design shows up with its A-game. And bringing our facilitation skills to future company problems is one of the best ways to do that while helping to ensure visibility for you and your team's work.

## **Design-to-code when side-by-side isn't an option**

Translating work achieved during the design phase into development is perhaps one of the most important stages of creativity, because it's when our design work becomes a reality. In other words, it doesn't matter how well a product is designed if the end result looks and behaves nothing like what the team intended. It's incumbent on every designer and developer to take this phase of work ultra-seriously.

A constant argument I hear against distributed teams is the need for designers to sit next to developers to cut down on time spent during the design-to-development handoff. Location aside, the desired outcome is a faster process with an increase in the quality of the code. Working remotely allows us to get there with a people and tools-first strategy.

Start by identifying what each role needs from each other during the phases of a project and who is responsible for delivery, communication, or both. Set up regular and ongoing times to check in. Next, bring in a tool like [InVision Inspect](#) to



help reduce designer ambiguity and the need for developer interpretation between design and code. This combined approach should not only improve your time to market, but also help to build trust between the two groups.

Meanwhile, do what you can to improve communication between designers and developers. When I was at Happy Cog, we had designers in Austin working with developers in Philadelphia. During crunch times it was common to see someone with an iPad open to a video chat session with a team member in the other studio. It wasn't for a meeting or a quick "call." They left it open and on for hours at a time to help mimic the feeling of sitting next to one another.

We did this a few times at the leadership level and I have to say it worked pretty well.

## **Centralizing and organizing resources**

Trying to keep all of your team's assets stored and documented in a single place is difficult enough. Working remotely can exacerbate the situation if you don't have identified storage, directory architecture, naming conventions, and automatic and manual backup schedules mapped out for everyone to follow. Document everything and place that file in your root directory. And then pin that file to your team Slack

channel for easier access in the future.

Your IT organization should already be on top of this, but if that's not the case, you can invest the time now to ensure work does not get lost. Spend time as a team looking at where work should be stored and what tools should be used for which tasks. Document all of these things to serve as a reference for the team and use for onboarding of new team members.

Organize regular rituals around cleaning local drives and ensuring files are moved to cloud-based solutions that have their own backups. Perhaps use this as the activity to be done before you all head into a virtual weekly happy hour.

- **Sidebar:** One of the goals of InVision is to create a "single source of truth" or "home" where design lives. By organizing all projects in InVision, distributed teams have a centralized place to explore all the work that a team produces. This can make InVision an invaluable system of record for product design. And when design collaboration is centralized in InVision, all comments and activities are stored, preserving invaluable institutional knowledge for the business.

## **Team documentation and better handoff process for OOO**

In a remote workplace documentation rules the school. This is especially true for anything operational. Documentation, stored in the cloud and pinned to team channels, are table stakes. And when something changes, update those documents as soon as possible and ensure that everyone on the team and your collaboration partners know what changed, why, and where those changes can be found.

This practice may be easy to remember for team operations, but what about individual team members? When someone on the editorial team leaves work for an extended period of time (vacation, maternity leave, etc.) they create a Directly Responsible Individual (DRI) transfer plan to ensure a seamless transition of responsibilities and decision-making authority.

Identify who is leaving and for how long. Designate the temporary DRI along with their contact information. In addition, list out your own contact information while you're away and indicate your communication situation (Will you have your work laptop? Will you have Wifi or cell service? Is there a huge time zone difference?) and finally the projects you're working on, their status, and any notes about what needs to happen while you're out.

[DRI transfer plan template](#)

## Right people, Right tools

Critical to success is ensuring you have the right people working to solve problems together. Traditionally this meant designers working alongside developers and product managers. But we need to look beyond this core group and be more inclusive; we need more roles to bring their hard-earned perspective to the experience creation process. Take a look at the end-to-end customer experience and document all of the parts of the business that help to make that happen, from marketing and account executives near the beginning of the experience, to the day-to-day use which likely involve customer success managers and different levels of customer support.

Just as designers hate to work solely from marketing's "voice of the customer," why would you just settle on prioritized notes from customer service? Designers are equipped with frameworks and facilitation to get multiple voices in a room and empower them to co-create together not as a single voice, but a harmony of voices.

When we work remotely our day is typically filled using applications to connect and collaborate (e.g., Zoom, Freehand, Slack, Google Docs). And it begins to feel like everything we do needs a tool in the form of another application. I'm here to remind you that is not the case for design! We have a powerful toolkit that enables us to understand people, validate the

problem(s) to solve, find needs to fill, and create innovative solutions that customers want to use. Your most powerful tools don't require software; they require people.

Design thinking should always be your primary toolkit, working remotely or not. And you should know all of the people and all of the "voices" that you need to bring together to create the right, user-centered experiences. Get to know these folks and invite them into your team to hang out. Don't know who these people are? Go find them! Don't wait for them to find you. You're the designer; you're the curious one in the room. Stay curious!

Lastly, do what you can to make sure everyone has access to the same tools and information. Few things are as challenging as *not knowing what you don't know that you don't know* because in the remote workplace it's difficult to stumble upon answers to questions that you don't know to ask.

All of this will help you promote and foster a creative work environment beyond the virtual borders of design. Share your knowledge and be an open book. The secret sauce is never in the *what* or the *how*, but the *who*. If you are known as the person who brings everyone together to solve problems then you may have ninety-nine problems—but working remotely won't be one.

Think inclusively. Be inclusive. Work inclusively. Design inclusively.

## Further Reading

[Remote work for design teams: InVision's essential resources](#)

[4 ways remote designers and developers can collaborate better](#)

[How to help your team excel at remote collaboration](#)

[How ACS Technologies cracked the hybrid-remote brainstorming code](#)

[Designing distributed: collaboration on Doist's fully-remote design team](#)

[The 4 rules of remote design collaboration](#)

[Collaboration workflows for remote design teams](#)

[4 exercises for your remote design sprint](#)

[How books became 99design's ultimate collaboration tool](#)

[6 tips for remote user testing](#)



## Chapter 3

# Leadership

Practical management advice for embracing the shift to remote

By Greg Storey



This is a milestone year for me. It marks twenty-five years of being a leader, and more importantly, it marks my quarter century anniversary with my dear wife (who I affectionately refer to in my writing as The Rocket Scientist). So, I've got a lot of miles on my engine. I've seen a lot and been through even more. That is to say, I've observed just about everything you can imagine when it comes to being a leader. I've led teams in small companies to gigantic global conglomerates; large national operations to small-medium business (SMB).

As I write this, the world is on lockdown due to the Covid-19 pandemic. What can I impart from over two decades of experience that will genuinely be helpful to you during a time only previously imagined as science fiction?

Whatever leadership or management style you had yesterday, I recommend switching gears quickly. You may evolve back into who you were before, but for now, your team needs strong servant leadership. Your designers need a work and life support system and, *ding* you're it. That doesn't mean you have to have all of the answers and you won't—nobody does right now. But you can listen. Fall back on your discovery process and use it to map out new requirements for your team, family, and community. There will be a time for strategic and transformational leadership later. Right now, your team needs a coach.

You're likely still trying to process what's happening. What's it like to lead a team that you can't hear or see? That is to say a team that's not seated in the same room as you. People who aren't even in your peripheral view—perhaps for the first time ever.

It's time to let go of our definition of normal—because that's gone. Make no mistake, we're on a path to a new reality that's forming in real-time—from entire industries to the GDP (Gross National Product) of countries. As leaders, we have to do what we can to help our teams, partners, and companies weather this storm-and-form period as best as possible.

Take the lead on reimagining cultural norms into a virtual equivalent or better. Just as our work is not tied to a place, neither are meetings or happy hours. Don't overthink this and start simple. From what I've observed in client conversations and chats with design leaders, people want to talk. They need to vent and hear themselves think out loud. Be the leader that people need *right now* by bringing people together; because we all need more conversations and more interactions—including you.

The following ideas are based on a lot of lessons learned, mostly the hard way, over my long career. When I started working remotely there wasn't a lot of great content on the subject. People called working remote "telecommuting." This

was around the same time people “surfed the web” or cruised the “information superhighway.” And we all wore acid wash jeans. Ugh.

Work with your team to remix concepts into a playbook that works for you. And then please reach out and share it with me; I'd like to hear about what you're doing. Last thought: Take care of yourself. There are people who depend on you, so make sure you're strong, healthy, and here to stay.

## **People first, work second**

I want to repeat the sub-headline in case it did not “auto-save” to memory. When working remotely people need to come first because you're no longer around each other all the time. There is a certain connection you get from being around others and that disappears completely when you're distributed. Grabbing time together now requires an invitation link and meetings only last so long. Out of sight, out of mind happens way too easily when working remotely. You have to prioritize time with your people—all of them.

It's time to exercise those soft skills and put intent behind your standing 1:1s. This will give you time to “see” your people and an opportunity to observe their behavior. The business will always provide distractions and want your attention, but you've

got to give your people the priority. Never, never, never-ever assume that anyone who reports to you will be “good” if you want to skip their weekly 1:1 session! And don’t skip out on your regular rituals with your team—more on this later.

Remember that you’re the one responsible for building up your designers— to make them better, stronger, and smarter. Time with each designer is critical to build them up, so they are prepared to crush it when they get back to their desks. If the business needs your attention, respectfully tell those co-workers to please find another day and time.

## Some do's and don'ts about remote working and 1:1s

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### Don't do this...

Don't wait for your designers to schedule time with you. This shows a lack of care and disregard for that person's career and well being.

Don't think a quick Slack "checkin" provides anywhere near the same experience or fulfills the interpersonal needs of your team.

### Do this.....

Schedule all of your 1:1s at least one quarter at a time and lock them in. Add information to the invite asking people to seek your permission before scheduling another event at the same time. If they add you to the schedule without your permission, decline it automatically.

Do use Slack to keep ongoing threads with each of your designers. Post links to interesting content or make a work-appropriate joke. Create the means to have an ongoing, positive connection with each designer.

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### Don't do this...

Don't use team time to diagnose the health of a team member's work. People may act differently when group dynamics are in play. Just because someone appears to be okay in a stand-up doesn't mean that reflects reality. Thus why 1:1 time is so important.

Don't host a 1:1 without documenting the discussion and any decisions made between you and the designer.

### Do this.....

Do use team time to provide transparency in company activities. Help interpret what's going on outside of your team. And do everything you can to continually reduce anxiety throughout the week.

Do keep a "living document" to include any agenda items, what was discussed, and what goals, objectives, and priority decisions were made. The next week, add a new date and repeat the steps. More on this in Chapter 2.

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Don't do this...

Do this.....

Don't let interruptions interfere with your 1:1 times.

Disable notifications (especially Slack) and turn off your phone

Don't make your 1:1 only about work.

Do use this time to ask how your designer is doing on a personal level. Ask about their family's well-being. If they have pets, how they are etc. Have they picked up any new hobbies or are they binge watching any new shows, etc.

Don't feel that you have to talk the entire time.

Do shut up and actively listen.

## 1:1s and journals

While we're on the topic of 1:1s, let's dig into an important detail. Another recommended practice is to keep a living document or a journal for each person that reports to you. Why? Your people are the most important part of the company. They are the greatest investment your company makes, so you need to take care of them. But as I wrote earlier, you also need to turn them into better designers and collaborators. Documenting their path week-to-week provides alignment between the two of you on what steps each of you need to take in order to build that person's skills and abilities.

Create a private document that is shared between you and the designer. Write out the date of your next meeting. Under the date, set three categories in the document:

- Main area of focus/attention
- What's going well/updates
- Questions/topics to discuss

And make it look good! I don't like thinking about how many times I've had to read a Google Doc set in Arial. We have access to every typeface in Google Fonts, but, no thanks, Arial will do. Who does that say to people? The only thing worse would be Helvetica, but I digress. You may be a leader,



but you're still a designer, so there's no need to make anyone suffer from default typography, type scales, and composition.

Prior to each meeting, you and the designer add topics under each category to set up the agenda of your time together. If you have topics left over from the previous session, add them to the list. Give the designer time to prioritize the list. This will help you get an idea of how the person might be feeling/doing. After the session is over, document any decisions made, move that appointment down, and create a new date and category group above it. Repeat each week.

Taking these steps will go a long way in making your designers feel like the priority they are. Keep these times sacred.

## **Standing team interaction time**

Now that your team has dispersed into working from their home, you'll begin to miss the ability to put together ad-hoc team activities like happy hour or team lunch. As working remotely can lead to feelings of isolation, group functions become even more important to the health of your team.

Setting standard interaction time is a way to ensure that your team has a built-in requirement to connect socially. Sure, happy hours and coffee times aren't exactly the same when

everyone is interacting through a camera, but you're better off pushing your team to connect than not at all. And is anyone really going to miss those crappy well drinks?

When we work remotely it's easy to think that all of our interactions have to take place over a video feed but that's not necessarily true. I know teams that use online games like World of Warcraft or Mario Kart to spend time together. I've read about other teams embracing the video camera and using a digital whiteboard experience, like Freehand, to play virtual Pictionary or charades. Don't like games? No problem! Try a cooking challenge, wine and painting, or karaoke. Need something that doesn't require as much time? Take turns teaching each other how to say morning and evening greetings in new languages. Or spend five minutes in group meditation or a breathing exercise. Dig deep in just a few minutes by exploring that insanely creative world of poetry together.

These are just a few ideas for team activities that could be translated into virtual experiences.

**Side Note:** You say it's your birthday? At InVision we use Freehand to create "cards" for team members on their birthdays and work anniversaries. People draw, write well wishes, and throw in an abundance of silly animated GIFs. It's a lot of fun.

Designers at IBM tinkered with the idea of starting an online

radio station behind the company's firewall. They brought in turn tables, mixers, microphones, etc. while their developer friends created a webpage that featured a streaming player. They started small, but a year later IBM gave the group a budget to build a full studio with better equipment. Today the radio station has programming around the clock with volunteer IBM DJs around the globe playing everything from funkadelic to EDM with a little old-time country music in between.

Group activities are important when you work remotely. Especially now during a time of global crisis, we need to get together—virtually—as often as we can. All of the above ideas aside, not every team gathering needs an activity. Just get together on video chat and leave the agenda open. The important takeaway here is that you need time together to keep your team balanced and in check. Start small and build a new routine. Then build from there. Take an idea from here or start a quick design sprint for you and your team to come up with your own unique event.

## **Re-create your team's working agreement**

Working remotely means not being able to “drive-by” a desk or run into someone in the hallway or kitchen. This type of interaction now requires pinging them on Slack to see if they are in front of their computer, asking if they have a few minutes

to chat, and cut-and-pasting a link to a video chat session. Team stand-ups by video now take longer than a few minutes as people log in and play with settings—“You’re muted! Nope—still can’t hear you” and “Hold on, my airpods aren't working.” You get the idea.

On the flip side, working from home also means that it’s now possible to rearrange your workday to adjust for running errands, managing your household, and taking care of children if you have them. Some of you will have too much time on your hands while others are double-booked.

Be empathetic towards each other! Otherwise it won’t take long before we see each other’s situation with envy. The single person may look at someone with a family as lucky because they’re not lonely, while the person with three kids will look at the single person and wish they had an evening of quiet. Everything we all know about work and how we interact with each other has changed—a lot.

My point is this: Take the good with the bad and consider this to be an ideal time to be compassionate towards one another. And what better activity to understand what you all are going through than a quick workshop on your team’s new reality. Using a virtual whiteboard, like Freehand, have your group work through the following:

- **Hopes and fears:** Create two columns, one for each label. Spend enough time to capture the hopes and fears of every member of the team, and make sure everyone participates. When finished, have someone from the team read out what's posted and synthesize the notes into themes as a team.
- **Identify problems:** After synthesis is finished, discuss the themes as a team and formulate problem statements that address the concerns. Once problem statements are done, have the team prioritize the list. If necessary, take the next step and place these items on a feasibility grid as there may be problems that may be outside of the team's jurisdiction. Save those for discussion later and move on.
- **How might we:** With problems prioritized, the last activity is to spend time thinking about how the team can tackle the problems. And consider how those solutions can be used to re-write your work agreement. Repeat this process as new problems emerge.

Publish the team's working agreement in the root directory of your shared storage solution and pin it to your team chat channels. Lead by example and share the story of your team activity with others in the company. You may find other leaders, especially in non-design roles, who are looking for ideas like this to help realign their team as well.

## Squash all of the elephants fast and quick

Bringing radical candor into your team's culture is difficult for in-person teams, but it's just as hard for those working remotely. The screen isn't a shield and being "on camera" is even more daunting for many people than speaking up in an in-person meeting.

This is why as the leader it's important to be as transparent as possible without creating any new anxiety. If you thought backchannel conversations were bad in the "workplace," they can be exponentially worse in a remote environment.

If you see something negative going on, set up a dedicated time to get it out in the open and encourage the team to talk about it in a productive way. Addressing the "elephant in the room" doesn't mean it's time for an intervention. This is likely going to be awkward enough. Be inclusive and invite everyone to participate in the discussion.

Remind the team to focus criticism on the idea, not the person.

In a distributed team, the longer elephants are allowed to fester, the more risk you run of toxicity entering the team. When we're working remotely and can't see the team, we can't observe the workplace as a whole. The isolation can compound the perception (real or imagined) and it doesn't take long for mob mentality to take over. Consider how a little thing

can get out of control online if it isn't managed.

When you see an elephant, pounce as quickly as possible!

### **Provide a north star and gain autonomy for your teams**

Design got its "seat at the table" by delivering on a central promise: Design can identify the thing to create, validated by customers, very quickly, and without the need to engage developers. A key tenet to the whole process is the ability to deliver on this promise fast.

To succeed in increasingly complex and accelerating markets requires speed. You could say that this is where the business and design are aligned, but that's only true if teams are given autonomy and empowered to make decisions quickly.

This is especially true in a remote environment where communication can take more time and getting approval or the "green light" can be more time intensive and convoluted. The last thing a business wants is to have a busy design team grind productivity to a halt as they track down stakeholders, schedule meetings, and await approval, but it happens all the time.



Mike Davidson on managing remote teams ([Watch online](#))

For situations where getting approval from stakeholders is important, try to establish clear processes for decision making. Distinguish between those who simply need to be kept in the loop versus those with true decision-making power. When you have this information consider the following steps to set up conditions for success and gain autonomy for your design team:

1. Invite members of the executive's team to join the design team during the project. To help provide justification for providing autonomy for your team consider these words from Richard Banfield, VP of design transformation at InVision: "Remote teams do better when they have a clear vision and the autonomy to implement it in their own way."



Leaders would do best to set value-based boundaries and let the culture blossom inside that space. Linking executive vision with practical work is essential. A high-level mission aligns the company with a purpose, but individual product teams do better when they decide their team-level vision and values.”

2. Depending on your company's culture there's a 50/50 chance they will join, which is a great chance to convert another person into an advocate for design.
3. Identify the executive who is sponsoring (paying for) the work to be done. Make sure they are at the project kick-off, key milestone check-ins during the design process, and at the end when the final outcome is presented.
4. Identify a proxy for the executive who is empowered to make go/no-go decisions for the executive when they are not available to interact with the design team. Make sure they are invited to every check-in as a backup for the executive.
5. Co-create conditions for when decisions can be made by the design team versus the need for executive approval. This step is important because it allows the executive to box in the team enough to control risk while also offloading

low-level decision making (which good executives hate having to make anyway) to the design team.

6. Use Playbacks to communicate the design team's progress, findings, and their next step(s) as a way to keep in constant alignment with collaborators, stakeholders, and executives. This will help avoid any surprises further in the project and provide assurance to the sponsoring executive.

Expect hiccups and bumps in the road—it's inevitable.

Whatever level of decision making you're empowered to make, set your expectations with your designers. They will need to understand what is at stake if design doesn't hold up it's end of the deal. Trust, when lost, will require double or triple the effort to gain it back.

### **Establish principles and process with your team**

Now it's your turn to provide autonomy to your designers by co-creating a set of principles and processes to guide their work. Again, here's InVision's Richard Banfield: "Take the time to co-create rules or principles or process as a team. That co-creation builds trust. The point is not to make a set of rules and drop it on my team. It's in the act of co-creation itself that the stories start."

As we discussed earlier, for a design team to thrive, to go fast means they need some form of decision-making power.

Create your principles to provide a high-level set of statements that help guide the designers' work and their collaboration with others. If you find yourself suddenly working in a remote environment, give it a few weeks for the new environment to sink in and then review your principles with the team to determine what, if anything, needs to change.

Processes help guide the team's effort to create new experiences from start to finish. Working remotely will definitely gum things up, but like the principles, it might take a few weeks for them to know exactly where and when. Pull together a list of new pain points and set about using design thinking to come up with needs and creative solutions.

Repeat these steps as often as necessary but revisit them at least twice per year. And consider doing this for your design team and your collaborative team at large.

## **Onboarding remote workers**

How you onboard new hires can make a huge difference in the time it takes for them to become full, contributing members of the team. This is especially true when working remotely

because it's almost impossible to shadow someone or even observe what the other team members do from a distance. The worst thing you can do when onboarding is to leave new hires up on their own without any support. It's impossible to *know what you don't know that you don't know*—not to mention extremely very frustrating for the new hire. More time and effort spent onboarding will provide the confidence new hires need and seek while helping to reduce frustration and eventually attrition.

Alison Entsminger, a designer at IBM, writes about [her personal experience and observations of onboarding new employees](#):

“Take me for example: I studied print design in school. I had never worked with developers before landing at IBM—much less built products for them. You can imagine my confusion and learning curve when I joined IBM’s Cloud Infrastructure team. Within this team that provides IaaS (Infrastructure as a Service) on a platform for developers, I was working on the UX and visual design of block, object, and file storage offerings. Provisioning, virtual machines, OpenStack, public vs. local vs. dedicated—jargon was flying over my head. For months, I tried to decipher conversations and

prioritize tasks—unsure who to ask for help. I sat silently in meetings—afraid to speak up in case I said something dumb. Soon, I realized mine was not a unique experience. As I talked to other recent design hires across IBM, I heard more stories of knowledge gaps and isolation.”



Alison Entsminger  
Designer — IBM

Your company may not be as large as IBM, but the knowledge gap and comfort level is compounded in a virtual setting.

New employees should be afforded inclusion, context, and instructions for each layer of your organization: industry, company, business unit, and team (there may be more layers depending on the size of your company and how it's governed).

Inclusive practices: For each level of the industry, it's best to bring employees onboard together until you get to the team level. This gives everyone a shared experience that they can build on as their comfort within the company grows. Part of these practices are to provide activities for everyone to get to know each other, such as the people who support internal

services (e.g., HR and IT) and company leadership. If possible, try to set up “lunches” where everyone gets used to the experience of socializing in front of the camera. At InVision, our onboarding experience, called Xenia, culminates in an afternoon session where new employees are put into small teams and tasked with creating a new user experience with our software. This gives everyone a collaborative task with a shared goal while learning how to use the company’s products. Once you get to the team level (after “graduation” from the company-wide experience) you can provide activities that will help raise their comfort level and establish trust quickly. Consider introductions where everyone, including the new people, tell their story in only five slides:

- Where are you from?
- What got you into design?
- What is your favorite work thus far?
- What brought you to the company?
- What do you hope to learn in the next four hours, four days, four weeks, and four months.

Also, Alison recommends another activity at the team level: “Ensure no one eats lunch alone on their first day.” Having a chat over a virtual lunch is a great informal way to get to know each other too.

**Context afforded:** Information is crucial to the success of new team members. Provide a shared history of the company and the industry or industries it operates within. What are the company's main products and what business models are in place? The same goes for the line of business: Provide an idea of how that business works and how it is governed and positioned within the company.

When you get to the team level you'll need to include additional details around how the team operates, who your partner teams are, and how often you collaborate with them. Provide the shared language of the industry, business, and team. Be sure to spell out every acronym (Enterprise-level businesses tend to have an affinity for acronyms)—anything you can do to elevate ambiguity in language will help tremendously. Use both TL;DR: and TLI5 (i.e., too long; didn't read; talk like I'm five) to help provide quick content using plain English. There will be plenty of time for rewiring the brain with industry-speak later.

**Contribution instructions:** The last drill down is to review how the team works and collaborates along with a detailed review of the experiences they're responsible for, what's in the backlog, and what the current roadmap looks like. Bring new team members onto each product or tool and explain how it fits into the team's process and rituals. Provide hands-on time to ensure their equipment works properly, syncs with the right things, and connects to the right backup solution.

Leave no detail uncovered. Do they have access to the right SAAS applications? What about all of the typefaces, so they can work across branding and the company's design system? The last step is to assign each new hire with an onboarding buddy. This person is responsible for ensuring that a new hire has been properly onboarded, gets their questions answered, has scheduled 1:1s for the first three months, invitations to all team events and rituals, and introductions to all of the people the new hire will work with. Ultimately, the onboarding buddy is responsible for doing what they can to get the new hire integrated and positively contributing in a meaningful way as soon as possible.

## **Playbooks: Creating recipes for common work**

Now that designers can't just pop over and ask how you want something done, it's a great time to consider providing bumpers to help keep them in their lane. Playbooks are a great way to empower your remote teams with tactical activities and frameworks for repeatable processes and practices. This type of repository is super useful in a remote setting to help provide enough detailed guidance to keep designers moving in the right direction while reducing the risk of how much process is left up to individual interpretation.



And let me tell you, interpretation when left unchecked will always go in a direction you didn't think was possible.

These types of documents can be created and curated for everything from HR to design practices to product development (and more). When done well, these experiences are several steps above a wiki and really shine when they reflect the company's culture. Our friends at Atlassian have set a high bar with their [Team Playbook](#) website, which includes tools and documents for a wide range of topics.

Here at InVision the editorial team uses playbooks to document the full process for writing a book like this one while the design transformation team uses similar tactics for all of its workshops.

And did I mention they are also useful for onboarding?

To get started, begin documenting the processes, activities, and tools that you want to make repeatable and available to your design teams. Link all documents to a table of content somewhere that's easy to find. If this "MVP" succeeds, then consider a full product process to create your own playbook repository in a format that best works for you and your team. And if you really want to nerd out, print all of the pages and keep them in three-ring binders.

## **Check-in with your peers: How are they doing?**

When you feel that you're on the right path to providing the support and leadership that your team needs, consider reaching out to your peers and partners to see if they are doing the same. As always, practice empathy and don't presume they're in the same situation as you. Different parts of the business are measured and managed differently. Make time to talk to your colleagues and look for problems you and your team might help to solve.

You and your design team will likely be under a spotlight that's shared by other departments, and this spotlight may not be considered as essential to the business in the future. Now is a good time to find ways to help your colleagues succeed during this extraordinary time of distress and distractions.

Thankfully the practices from modern-day product design give us the tools to facilitate all kinds of problem-solving, product-related or not. Bring as much value as you can to your teammates. Help other departments identify the right problem to solve, the balance between the needs of the business and the user, and most importantly, the ultimate universal problem. Teach them how to facilitate their own team workshops and design thinking-based activities.

As a leader you have access to these tools that can help you help others. Become a universal

resource and empower your colleagues to help themselves.

## **The remote design leader**

If you're a visionary or transformational leader, going remote will present you as someone in the company who can provide an energetic, positive voice to the entire company while the company is going through difficult times. And this is certainly one of those times.

Successful leadership in a remote environment requires more use of your soft skills: listening and diplomacy to name just a few. And you're going to need to practice patience in a way and at a level you may not be accustomed to providing. All of this extra effort is going to drain your energy. This also applies to members of your team. Other people outside of your team will look to you for how to deal with this new reality.

How are you taking care of yourself? This is where you need to lead by example. You have to help guide and set your team's approach to work/life balance and how you recharge. There are two batteries that you need to recharge: physical and mental.

The physical side is pretty obvious and most of you likely already have a routine. As a baseline, walking is generally the

most common form of exercise. It promotes good health, reduces stress, and you can possibly get some work done during the activity—namely meetings. Try to stack meetings and walk your way through them, but don't make everything about work. Get some music on those AirPods and give your head some space. Encourage your team to get outside and move.

Your mental battery is equally important. As a team leader you have people coming to you with problems throughout the day. Engaging people—active listening, practicing empathy, and patience—all require mental energy. We need our leaders sharp during a crisis! We need your A-game, but you can't do that without recognizing the need to recharge.

Find a peer, someone who you can talk to and share your stresses. This will help clear your mind and reduce your cognitive load. If possible, set up a standing meeting so you have time blocked off to get the support you need. And get plenty of sleep. All of our futures are up in the air, so rest and prepare. This is going to be a marathon, not a sprint, and we're just getting started.

We are going through a remarkable time that is way, way bigger than anybody wants to deal with right now. My last thought for you is to remember that you are a human being. And there are limits to what we as human beings can process.

If you're feeling overwhelmed don't be afraid to let yourself have a moment to be scared, to be numb, to not understand. Let yourself be vulnerable (maybe not in the middle of the company all-hands video conference) but at a time that feels right. Find the space you need to take a deep breath and let it go.

Be well. Stay well. Design better.

## **Further Reading**

[How to build \(and sustain\) culture in a remote environment](#)

[6 things remote companies must do to build great culture](#)

[How Zapier is building a remote design culture](#)



## Chapter 4

# Tips, tools, and tricks for working remotely

Advice on the essentials of remote design teams

By Abby Sinnott

We often hear from other design teams that building and maintaining a collaborative culture in a remote environment is one of their biggest challenges. The good news is that creating highly productive teams is all about the people, not the space they inhabit. As Julia Elman, director of design at the distributed company Zapier, said: **“To do great design, your team doesn’t have to be in the same room.”**

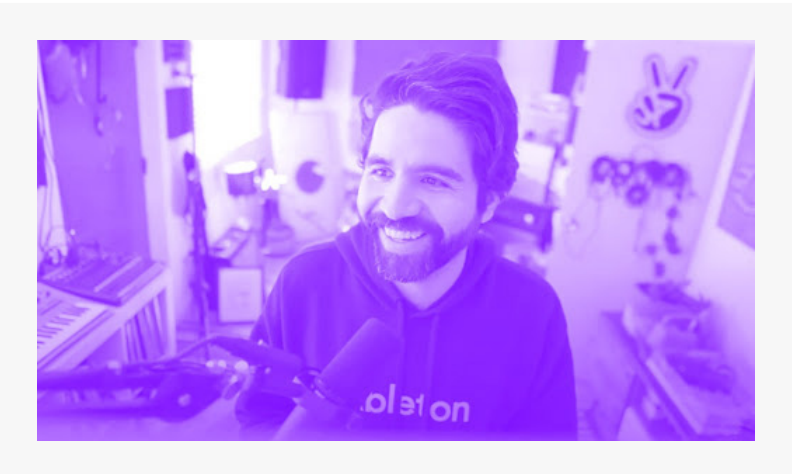
Design is a process of solving real problems for users, which can be achieved remotely while still preserving the spirit of collaboration. To do so, distributed teams must continuously cultivate the fundamentals of a collaborative culture: psychological safety, trust, communication, and inclusivity.

This chapter will show you how to build the core characteristics of high-performing collaborative teams, despite the physical distance.

## **The Basics**

By now, much of the basics of remote work are well known. But it’s worth revisiting some of the fundamentals for those who may be new to it.





Pablo Stanley on maintaining a separation between work and home life ([Watch online](#))

Working remotely is a big change to your typical work environment. Take the time to solve for some of the basics in order to best set yourself up for success. Some of the most common tips :

- **Create space** It takes time to rewire the brain to work in a new environment. One way to help is to create a dedicated space in your home for work. Small cues like a dedicated desk or room can go a long way to sending your brain the right signals for “work.” And once you’ve established a comfortable home work setup, try venturing outside the home to a local coffee shop or library. The ability to work

from anywhere is one of the great joys of remote work, and a change of scenery can be invaluable for reenergizing.

- **Get ready** Even if your commute is now a few steps, prepare as though you were going into the office. Take time in the morning to eat breakfast, get dressed, and do other morning rituals before sitting down to work.
- **Keep consistent hours** Teams should try to keep consistent hours to reduce confusion. For teams that work in different timezones, be cognizant to schedule big or important meetings in overlapping areas of the workday.
- **Block time away from the desk.** One of the central benefits of remote work is that one can step away for a doctor's appointment, to grab lunch, or run an errand. We encourage remote teams to take advantage of this flexibility. But block these moments on your calendar or set a status in Slack so colleagues can expect when you're away from the desk.
- **Stay healthy** Go for a walk. Get a chair with healthy back support, or a standing desk. Get up from your desk at least once every two hours.
- **Stay social** We all need human contact. Set up time each day, or at least a few times a week, to get together with friends—or at least get a change of atmosphere.

## Tools of the trade

Remote work has exploded alongside the rise of digital collaboration tools. While there is no shortage of tools in the market for enabling remote work, we thought we'd provide a glimpse into the tech stack we use at InVision to remain connected.

- **Slack** We live and breathe in [Slack](#). It's our primary communication channel, and the water cooler around which we all congregate.
- **Zoom** All video conferencing is done through [Zoom](#). It's a secure, fast, and reliable solution with robust features including polling, breakout rooms, screen share, and more. Tip: Keep your video on! This is an important signal to the room—and yourself—that you're fully engaged in the conversation at hand. This is less important in large meetings when your participation isn't required or expected, but still a good general best practice.

"I think one of the most important things is cameras on. Having cameras on with video is important, but especially for a design critique. One statement could sound so absent of empathy, so getting to see everyone's faces and that they're engaged and asking questions

is important. It's not the same as being in the same room, but it's so dramatically closer than just text or comments on a document. And as long as the room is small enough, less than nine, you can see their faces and still pick up on a lot of the nonverbal communication."



Dave Lewis

Director of engineering — InVision

- **G Suite** From simple slide presentations to 100-page long Google Docs, [G Suite](#) keeps us productive. We also use Google Drive as our primary cloud storage solution, through which everything is searchable and accessible. Whatever your cloud storage provider, make sure to keep things organized and tidy to make it easier to track down items.
- **InVision** [InVision](#) is an entire platform built to help design teams collaborate remotely and it's what we use in our own design teams to brainstorm, create, prototype, test, and collaborate with engineering. Freehand is one of our favorite collaboration tools that makes it easy for anyone to jump into an infinite canvas and work together in real-

time. We use it for everything from project planning to creative explorations, whiteboarding, design sprints, design reviews, and much more.

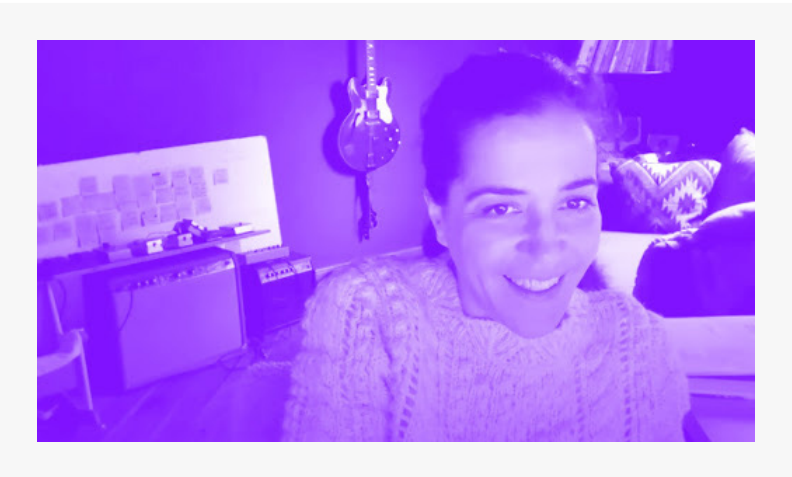
- **Confluence** Confluence by Atlassian serves as a central repository for all sorts of critical internal documentation, from AMAs with the CEO to new product updates. While centralizing knowledge is something every company could benefit from, it's especially important in a remote environment as there is much less "ambient communication" floating in the air.

Getting the basics in place is an important step to making remote work successful. Teams will need shared tools for video conferencing, messaging, and documentation. Design teams will need extra tooling to accommodate key stages of the design process in a digital environment.

But try not to overthink things. The success of remote work depends primarily on the human relationships we develop. The value of taking the time early to establish shared tools and processes is that it frees teams to focus on the real work: being creative and collaborative.

## Mythbusters

Over the years, remote work has developed baggage in the form of myths or misconceptions. Some of these have been internalized at a deep level. So before we go deep into specific strategies and best practices, let's take a moment to dispel some of the most notorious myths out there.



Alison Rand on remote work and productivity ([Watch online](#))

### Remote workers are less productive

The most common fear of managers concerning remote work is the fear that it makes teams less productive. But the reality is that all evidence points to the contrary. [Research](#) out of Stanford University found that remote employees were on

average 13% more productive than office-bound peers, and a study by Google concluded there was “no difference in the effectiveness, performance ratings, or promotions” for remote workers compared to co-located teams.

“We found a highly significant 13% increase in performance from home-working, of which 9% was from working more minutes of their shift period (fewer breaks and sick days) and 4% from higher performance per minute... Home workers also reported substantially higher work satisfaction and psychological attitude scores, and their job attrition rates fell by over 50%.”

—Stanford University Research by Nicholas A. Bloom, James Liang, John Roberts, Zhichun Jenny Ying



Stanford University Research by  
Nicholas A. Bloom, James Liang, John  
Roberts, Zhichun Jenny Ying

## Creativity can only happen in the same room

Being creative in a remote environment is just as feasible, though it requires more deliberate communication and benefits from a clearly defined process. In an office, lots of creativity “emerges” from teams being in close proximity. In a remote environment, the creative process must be made more explicit. But when this is done, creativity can flourish no matter the distance.

“Creativity comes from the ability to feel safe being curious, to try, fail, and learn. Creativity comes from culture. It takes more intention to build in a remote environment, but it’s not something that remote does or doesn’t make happen.”



Emily Campbell  
Director of experience  
strategy — InVision



## **Remote workers are less engaged**

Remote workers tend to be happier and stick around longer, largely as a result of better work-life integration. A report by research firm Gallup found that “job flexibility increases engagement” and that “the optimal engagement boost occurs when employees spend 60 to 80% of their time working off-site—or three to four days in a five-day workweek.” This has a cascade of benefits, from employee productivity to reduced attrition.

## **Working remotely is less personal**

Remote work removes the artificial barrier between work and life. There are few interactions more personal than beaming into a colleague’s home office, living room, or local coffee shop. In our experience, this intimacy tends to foster deep personal relationships between colleagues. While there are obvious benefits to in-person meetups as opposed to virtual ones, we see these as complementary features of remote work—not mutually exclusive ones.

## **Remote work will hurt my culture**

Fully distributed teams can develop cultures just as strong as co-located teams. The difference is that remote work tends to

amplify existing cultural problems in ways that may be hidden in an office. Teams lacking psychological safety will further isolate themselves when working remotely. Organizations with rigid hierarchies will find it harder to manage distributed teams. Going remote provides an invaluable opportunity to address these problems and strengthen culture by removing bureaucracy, fostering trust, breaking down silos, and empowering teams.

Culture is so fundamental to keeping teams healthy that it deserves a closer look.

## **Solving for culture with trust and psychological safety**

A healthy corporate culture is built on shared values, trust, relationships, and empathy. It's defined by a common set of values, norms, habits, and characteristics that shape the way we work together.

“Psychological safety, in an organizational sense, is the feeling that it’s okay to take risks and be vulnerable in front of each other.”



Mike Davidson

VP — InVision, Former VP of  
design at Twitter

As Michael Mankins, a partner at Bain & Company and a leader in the firm's organization practice said, "Culture is the glue that binds an organization together." And while leadership sets the core values that define the culture, it's not about just one person, but rather about teams—how they work, communicate, and grow together.

Culture is vital to a business's overall success. It's been proven to directly influence things like employee happiness, engagement, retention, recruiting and even the bottom line. In fact, our [2019 Product Design Hiring Report](#) found that **84% of product designers identified a strong internal design culture as the number one most important criteria when evaluating new job opportunities.**

Company cultures look different for every company. While unique and nuanced, there are universal characteristics to cultures that promote effective collaboration. **Specifically, collaboration thrives in cultures with a high degree of trust and psychological safety.**

One famous Google study code-named Project Aristotle found that, above all other factors, psychological safety was the hallmark of high performing teams. Leadership expert and author Simon Sinek famously said: **“A team is not a group of people who work together. A team is a group of people who trust each other.”**

### High-trust teams are high performing teams

Regardless of the type of work environment, trust greatly influences a team’s performance and health. A Harvard study compared employees who work at high-trust organizations to those working at low-trust companies and found that employees at high-trust organizations experience:

- 106% more energy at work
- 74% less stress
- 50% higher productivity
- 76% more engagement
- 40% less burnout
- 29% more satisfaction with their lives
- 13% fewer sick days

While fundamental to any relationship, trust is even more important in a remote environment because you must be counted on to do your job, even though no one's watching. And trust is a two-way street: managers and employees need to be honest with one another about any challenges they are experiencing—work related or personal—that may impact their ability to perform. It's easy to hide what's really going on in a remote environment.

"It's easy to suffer in silence when working remotely," said Stephen Gates, head design evangelist at InVision. "You have to empower vulnerability in your teams to be honest about what they're going through, because it's easy to show up on Zoom for 30 minutes and be really chipper, then turn your camera off and put your head on your desk. So you need to build those relationships."

But how do you build deep relationships and trust with a team that's not in the same city, or even the same country, like at InVision, where we have employees in nearly 30 countries?

"Although the outcome is trust, that's not where you start," said Richard Banfield, VP of design transformation at InVision. "It's the result of specific things you must continually work at, such as establishing psychological safety with each member of your team, before trust happens."

## Here are 3 ways to build trust and psychological safety

### 1. Be reliable

Reliability is the backbone of trust, especially in a remote environment where teams need to count on one another to do what's expected of them, in the absence of regular in-person check-ins. In a remote environment, employees are held accountable for the work they produce, not the hours they work.

"Setting expectations and meeting them is a way of creating trust. It's a flywheel. The more you're reliable and say you'll do something, and then do it, the more trust you create and it becomes an expanding circle. You start with a small agreement, then build on it, until you have a bigger repository," said Banfield. "But it's important that those agreements are clearly defined by managers so that people know what's expected of them."

He added that one way of mapping people's responsibilities is through OKRs. At InVision, each individual team designs quarterly OKRs that align to the company's overall strategy and North Star, so that there is no confusion about goals and expectations. These OKRs are transparent and can be shared with anyone in the company, which helps to foster collaboration, productivity, and trust between managers and their teammates. OKRs also help prioritize work and boost

morale by ensuring to people that the work they're doing is valuable and contributing to the company's overall success.

Research has found that 60% of employees aren't well informed about their company's goals, strategies, and tactics. Uncertainty about a company's direction results in chronic stress, undermines teamwork, and reduces trust.

On a microlevel, Banfield said that in a remote environment, it's important that managers make it clear how and when they want regular progress to be communicated to help people stay committed to their tasks and goals. It might be over Slack on Fridays, during weekly stand-ups, or documented in a Jira board or 1:1 doc.

## **2. Be vulnerable**

Society has taught us that vulnerability is synonymous with weakness, especially in the workplace. But things are starting to change.

Brené Brown, research professor and bestselling author, believes that every business can benefit from a more courageous company culture and braver leaders who are willing to be vulnerable, which means being honest and transparent in the face of uncertain outcomes. Simply put, it's admitting that you don't have all the answers.

“Vulnerability is the new leadership currency. Especially because creativity isn’t  $2+2=4$ ,” said Gates. “Create a space to be honest so people know they can trust you. Care beyond the bounds of work or a meeting.”

People don’t start to truly know one another until they let themselves be vulnerable. But how does vulnerability happen in a remote environment? It starts with making it a priority to get to know one another.

During a recent leadership team meeting, Brian Kardon, CMO at InVision, led a “vulnerability” team bonding exercise by asking the group to describe a challenging personal event that resulted in an enduring and meaningful life lesson.

“In order for this exercise to work effectively, there really needs to be an environment of trust and complete confidentiality,” said Kardon. “You’ll find that when people share these kinds of profound personal things with their teammates, such as the death of a loved one, divorce or sickness, people and teams bond in very strong and lasting ways.”

### **3. Start with the human**

When working remotely, developing empathy for your teammates means appreciating the person on the other side of the screen as a human being.



One of the upsides of working from home is that it automatically creates a kind of intimacy that doesn't exist in traditional offices. We all know the famous BBC scene of the kid walking in on the interview. Remote means that your work and life are closely integrated, so it's only natural that aspects of our personal lives—our homes, kids, and pets—are shared with one another (whether we like it or not!). We consider this unique aspect of remote working a great way to get to know one another. If someone's kid unexpectedly interrupts a meeting and comes into the frame, we want to meet them and even ask them a few questions.



A classic remote work moment: The kids bum rush a live call with the BBC. ([View animated figure online](#))

We also make it a point to start with the human, rather than work. For instance, we begin meetings by spending some time catching up with one another on a personal level. We share how our day is going, or what we did over the weekend. This is a great way to engage and connect with people. Some teams also start with a brief online meditation exercise, which helps to clear and focus the mind before work begins.

In a remote environment, it's important not to neglect the fun, social aspects of work where relationships blossom and cement themselves. Just because you're not physically located in the same space doesn't mean you can't have a beer together after work on Friday. We have virtual happy hours, coffee breaks, and lunches where we make it a point *not* to talk about work.

### **PRO TIP:**

Establish a rotating team Show & Tell (10-minute presentation) where people practice what we call "purposeful vulnerability" by sharing something personal, or teaching teammates a new skill (not necessarily work-related).



Eli Woolery shared photos from a dive trip in a team show and tell session to help his colleagues get to know him better.

## **Remote requires purposeful communication**

Communication is important to any team, but especially on design teams because of the collaborative nature at various phases of design work. And communication is *everything* for distributed design teams because they're at a higher risk of becoming disengaged, disconnected, and siloed. Without it, remote work falls apart.

“When everyone is in the office together the assumption is that everyone is communicating. That’s a dangerous assumption.”



Richard Banfield

VP of design transformation — InVision

In a remote environment it’s important to over-communicate. However, there’s a fine line between over-communicating and communication overload, which is ultimately paralyzing and bad for productivity.

### Eggs versus bacon

Loop in the right people, but not *all* the people. In a remote environment, it can be tempting to involve more people than are actually needed. This creates the danger of meeting creep and produces a lot of noise. Having too many “Brady Bunch” heads on a Zoom call can make a huddle feel more like an all-hands. Be conscious of not burdening your colleagues with unnecessary communication.

Another good rule of thumb is to consider the age-old “eggs

versus bacon” question. A chicken lays eggs, but isn’t as invested in creating breakfast as a pig is—who gives its entire being to making bacon. When inviting people to a remote meeting, consider who is most invested in the work at hand. Try to include all the “bacon-makers,” but consider whether those just “laying eggs” could be better looped in with asynchronous communication such as a Slack or email message.

## **Move hard conversations to calls**

When the message is too complicated or nuanced, don’t be afraid to suggest jumping on an impromptu Zoom call or picking up the phone. If you have to ask four or more clarifying questions by Slack or email, do yourself a favor and talk instead.

A quick five-minute call to ask questions, gain clarity, or provide more info about that wireframe can save you hours of time fixing mistakes down the road.

## **Structure and clarity**

In a remote environment, you also need to be much more structured and scheduled around collaborating and

communicating, which ultimately results in a cadence that will help you scale.

“Remote teams with routines and rituals generate consistently positive outcomes. It can be helpful to commit to a daily, weekly, monthly, quarterly, and even an annual schedule of communication activities,” said Banfield. “These standing meetings signal to team members that communication is a priority.”

And because impromptu meetings are less common, remote communication demands that you’re more purposeful and intentional about expressing the goal of a call, the message you’re trying to convey, and what you need from your teammate. It’s a great idea to create a meeting agenda in advance and link it to the calendar invite so that people know the purpose of the meeting and can prepare. Respecting your teammates’ time is also essential. Show up on time for meetings, and when possible, wrap up on time.

To keep the conversation focused during bi-weekly design critiques, our design team uses a very specific set of questions as a framework, including:

- What’s the goal of the project?
- What are the constraints you’re working within?

- What stage is the work at?
- What *kind of feedback* are you looking for?

"Asking presenters what *kind* of specific feedback they're looking for from the team has been really successful in creating purposeful conversations, rather than just saying, 'Okay, let's talk about the project,'" said Caitlin Wagner, product designer at InVision.

## Staying in touch with standups

The whole point of standups is to check-in as a team and actually see each other. They're a way for design leaders to get a quick read of how each team member is doing that day— and any blockers. You can tell a lot from seeing how a person is engaged or withdrawn, and even in the tone of their voice.

Standups can feel like a major challenge in a remote environment. But we've found that once you get the hang of it, remote makes for better, more focused standups. All you need are a few ground rules.

## Tips for conducting remote standups

### Find the right time

Remote teams commonly span several time zones. Ideally, hold your standups at an “overlap” hour where most of the team will be able to participate. It’s important to establish a regular, consistent day and time to check in as a team—and stick to it.

And for those who can’t make it (like teammates in Australia, for example), make sure you have a dedicated notetaker and always record your standup, which you can store in a centralized place and share afterwards.

### Never start with work

As we said earlier, to get people engaged and feeling comfortable, don’t dive straight into work. Our design team spends the first 5 to 10 minutes of stand ups just chatting and asking each other how they’re feeling. On Fridays they spend most of the time talking about fun stuff, like someone’s new dog, an interesting article they read, or an art show they’re planning on checking out over the weekend.

“I think it’s important not to lose sight of the human aspect of collaboration, especially when working remote,” said



Wagner. "This kind of personal reveal helps create a rapport, build relationships, discover commonalities and create psychological safety."

The team also plays the rose/bud/thorn/gem game, where everyone's encouraged to share how they're feeling both at work and on a personal level.

🌹Rose: I'm happy with...

🌱Bud: I'm excited about...

😬Thorn: I'm worried about...

💎Gem: I saw this awesome thing...

## **Have a clear agenda**

A clear agenda is critical to conducting a successful standup in any work environment. Our design team uses a Jira board that tracks all the work in progress across the team. The team goes around the "room" with each designer who answers the following questions:

- What am I working on today/this week?
- What stage is it at?

- What is today's goal with this work?
- What help could I use from the rest of the group?

There's frequently time left over at the end of standups, which are used to review smaller pieces of work that can be resolved quickly, plan for the week ahead, or just end early to get some time back.

### **Find what works for your team**

"It's traditional to have standups every day, but that felt overwhelming for our design team," said Wagner. So instead the team established a cadence of 30-minute standups on Monday/Wednesday, one hour design critiques on Tuesday/Thursday, and a "happy half hour" on Fridays to talk about decidedly non-work related topics.

"When it comes to planning standups, it's important to figure out what works best for your individual team," said Wagner. "Standups don't have to be every day; you don't have to follow what everyone else is doing. Different things work for different teams and that's okay."

## **PRO TIP**

“In both traditional and remote working environments, it’s easy for your calendar to be completely overrun by meetings, and that can be devastating for designers who need to have large chunks of time available to get into deep focus work mode,” said Wagner. “So be respectful of time—if a standup ends early, give that time back! If a 30-minute meeting can be accomplished in 15 minutes, do that instead.”

## **Being inclusive in a remote environment**

Inclusivity and diversity are critical to design teams that are responsible for building products that take into consideration the needs, experiences, and preferences of the widest possible group of people.

Designers have a responsibility to challenge the assumption that there is an “average” user or that audiences fit neatly into a set of personas.

“Designers now have a responsibility to understand and design for the needs of individuals with varying cognitive and physical abilities,” said Clark Valberg, InVision’s CEO and co-founder. “In other words, designers have a responsibility to design inclusively.”

But in order for designers to build inclusive designs, they need to work in an environment that's truly inclusive, too.

Remote working can be especially challenging for people who are naturally introverted (a common characteristic of designers). There's more of a risk of the few same voices dominating the conversation, which often means good ideas go unheard. In order to get a diverse representation of thoughts, it's critical to create an inclusive working environment. This starts with establishing psychological safety so that everyone feels like they can contribute *and* are being heard, which takes some extra effort in a remote environment.

But remote collaboration also benefits from the lack of constraints around geophysical boundaries, making it possible to include a much more diverse set of stakeholders. One of the main reasons Valberg co-founded InVision as a fully remote company (we don't have any headquarters) was to be able to recruit the best talent in the market, regardless of location. So in that sense, we're a company without borders.

With colleagues working in 30 different countries around the world, our diverse workforce and their unique perspectives are one of our biggest competitive advantages.

"For years, the majority of the products I helped design were built by teams of people based in New York City. After

working at InVision and experiencing what it's like to design with people all over the world, I would never want to return to designing with a team based in one place," said Susan Kaplow, VP of brand and content at InVision. "Different points of view, lifestyles, experiences, and backgrounds are so essential in making impactful products."

### **Encouraging diverse voices in meetings**

In a remote environment, team meetings are the main opportunity for people to share their ideas and express their opinions, but if not managed and run properly, this can turn into a problem. It's the responsibility of managers to create psychological safety and find ways to encourage introverted team members to share their ideas.

"Meetings are the ground zero of isolating experiences. Voices of the minority can be suppressed or marginalized by the majority without an advocate or process to make space for them to be heard," said Jehad Affoneh, head of design at VMWare, who knows what it feels like to be one of a kind in a meeting room. As a Palestinian living in Palo Alto, he rarely encounters anyone at work from his background.

As a team leader, Jehad works to find ways to bring those who feel isolated into the group, not only to promote inclusion but

also to help retain top talent. His best tip for making meetings more inclusive and productive: Give team members more ways to share their ideas than just talking in the “room.”

To help make the change at VMware, Jehad structured his meetings differently: He began to send out an agenda ahead of time and asked everyone in attendance to take a look and make any comments. He found that this created an environment where people felt their opinions were valued and welcomed.



Jehad Affoneh

[Listen Online: Making sure diverse voices are heard in meetings](#)

There’s an added bonus in this approach: meetings become more productive. Being clear about what’s going to be discussed and capturing your team’s perspectives ahead of time will make for shorter, more focused, and worthwhile meetings.

“This is not about, ‘let’s have a loud conversation,’” Affoneh said. “This is about ‘I truly want to listen to everybody in the room.’” He also recommends spending the first couple minutes of a meeting setting the context.

## PRO TIP

At InVision, we start team meetings with a fun ice breaker to encourage people to engage and feel more relaxed, such as: “What did you want to be when you grew up?” “What’s the first concert you ever went to?” These conversations also give you a window of your teammates as people outside of work.

## Relationships are key

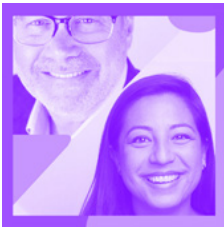
“You still want the same outcome in remote work, which is developing trust, an inclusive environment, and relationships with your colleagues,” said Richard Banfield, VP of design transformation at InVision. “Though in order to achieve those things, you need to get creative.”

The most important way of creating inclusivity is through relationships, which don’t happen naturally if you’re not sharing the same physical space. In a remote environment, you simply need to cultivate relationships with intentionality. Send someone a non-work related Slack message to say hello and ask how they’re doing. At InVision we have a bot on Slack called Donut designed to “encourage trust, collaboration, and good will across your team.” It pairs you with random people and says: “Go get to know each other.” For example, a couple of InVisioners bonded over their family history of Jello salads, sharing recipes like grandma’s lime green jello salad

concoction.

### **Case Study: Pivoting to remote to build inclusivity and connections**

Like many companies around the world, InVision had to cancel our annual sales and marketing revenue kickoff meeting (what we call RKO) due to Covid-19. We were less than a week away from 250 InVisioners hopping on flights from 20 countries around the world to convene for the first time at our three-day, million-dollar meeting.



Brian Kardon and Katie Baker

Listen Online: [Pivoting to a remote event](#)

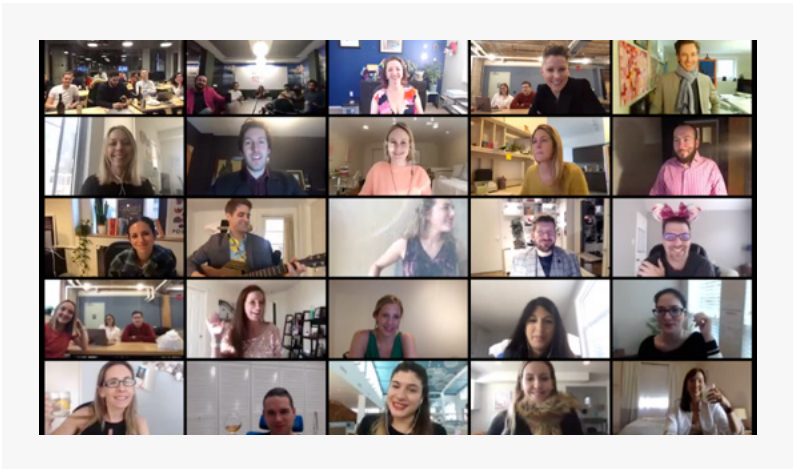
These annual kickoffs are especially important in a remote company because they offer a rare chance to interact in person and build relationships. It was going to be an inspiring three days of training, eating, and epic late-night bonding. We were all preparing and looking forward to it for months.

When the warnings about Covid-19 became more urgent, our team had just a few days to pivot and plan a virtual event instead. While InVision lives and breathes #remotework, we'd



never held a multi-day remote conference before and weren't sure how it would go, especially with such a tight turnaround. How would we possibly keep people engaged for three days of five-hour video presentations? How would we make the event feel inclusive? How could we make up for the lack of IRL (in-real-life) connection?

But based on our employees' feedback and post-RKO surveys, our virtual RKO was actually the most inspiring, engaging—and cost effective—event yet.



Team events can be magical and fun, even in a remote setting as seen here at InVision's RKO event.

“Team members told us that the virtual experience—versus sitting in a crowd of people in silence in a dark hotel ballroom—allowed them to feel more connected to the content and

each other," said Brian Kardon, CMO at InVision. "And for presenters delivering content from the comfort of their homes, without the nerves of a large stage and big audience—their enthusiasm was infectious."

Of course, nothing can fully replicate aspects of an in-person experience, but our team designed a bunch of "fun stuff" to make the virtual experience personal, authentic, and inclusive. There was music, costumes, a "Share Your Remote Life" photo slideshow, InVisioner MTV-style "Cribbs" videos where people gave tours of their houses, and several rounds of "Guess That Desk!" Team members got dressed up in their finest attire to attend our virtual sales and marketing awards ceremony that would have been a full evening dinner event. And we used the online polling tool [Poll Everywhere](#) to make sessions interactive and personal.

In the end, the positives of hosting a virtual event outweighed the negatives of not getting together in real life. We're leveraging the lessons learned from our virtual RKO to transition our upcoming events to virtual platforms.

"Our team worked for months to plan every detail of RKO. When the decision was made to pivot to virtual, we had just a few days to execute. We'd never done a multi-day, 250-attendee remote conference before and were *extremely* nervous," said Katie Baker, senior program manager at InVision, who led the

planning of RKO. "But in the end, virtual RKO was amazing— attendee engagement was high, presenters' energy was palpable, and we were able to be more efficient and effective with content delivery than we ever thought possible. It showed our strength as an agile remote company and it brought us all together in a way that none of us could have expected."

### Filtering signal through the noise (Slack and Email ≠ Communication)

"Be deliberate in how you want to communicate with people. Email says to me: Get back in a day or two. Slack is: Get back to me at some point today. Text is the red bat-signal of: Get back to me now!"



Stephen Gates

Head design evangelist — InVision

In a remote environment, it's only natural that everyone relies heavily on text-based communication. And while technology has helped mitigate many of the legacy communication challenges of working remote, endless Slack channels, threads

and email chains undoubtedly create a lot of noise.

Being clear and concise when communicating is critical, but so is selecting the right tool to communicate your message, which should depend on the circumstance. For example, InVision's CEO and co-founder Clark Valberg says, "If the conversation is emotional, move it to Zoom where you can have a 'face-to-face' chat and quickly get to the heart of the matter."

## **Here are some of our best practices for effective, remote communication:**

### **General tips**

- Don't make assumptions. If something isn't clear—ask.
- Thoughtfully over-communicate and get comfortable with being more forward.
  - Ask for what you need and note when you need it.
  - Be specific with regard to the desired outcome and the time by which you need it. This sets you and the person you're communicating with up for success.
- Start by believing in positive intent, as both a giver and

receiver of information.

- Don't be afraid to switch methods in the middle of a conversation. Do what's right to make sure your message is appropriately delivered to your audience.

### **Video conferencing tips**

- When chatting over video, it's harder to convey and receive non-verbal communication cues. This is why having your video on (when you can), making eye contact with your camera, and using hand gestures while using video conferencing software is so important. Pay attention to your own body language so you don't send the wrong message. For example, arms crossed may make people think that you're angry or defensive. Instead, try sitting up straight to convey that you're engaged and paying attention, and smile and appear calm so that people feel comfortable when communicating with you.
- Use visual communication to support your written communication. We are a Slack-heavy culture at InVision, but we also use emojis and gifs frequently to make up for some of the non-verbal communication that's lost in a written message. Get your gif game on!
- Highly-sensitive laptop microphones pick up background

noise and keystrokes on video conference calls. Do everyone a favor and use a headset when in public places, and mute your audio before typing.

- Light the front of your head, not the back! If your lighting is behind you, people will only see a silhouette.
- It's a good idea to keep your space (at least the part that's in the camera frame 😊) neat and clean. While it doesn't need to be anything fancy, you may want to "curate" your backdrop a bit to reflect your personality, such as by hanging some cool artwork or positioning yourself in front of your book collection. Your space reflects you and if you're talking to customers, you represent your company.

### **Messaging tips (G Chat, Teams, Slack, etc.)**

- Keep your status up-to-date to let your teammates know when you're available in real time or will respond later.
- Most messages are answered within a day unless you're out of the office (which should be noted in your status 😊).
- Emojis and gifs are communication, too. You'll commonly see emojis used in lieu of a response like:

- 🙄 for "taking a look"

- 👍 for "got it" or "understood"
- 🎉 or 🙌 for "congratulations"
- Be transparent. Not sure if you should send a message to one or two people, or your full team? If you're questioning it, send it to everyone who may need the info.
- Replying in a group DM or channel? Use a thread. This makes it easy to follow the conversation, keeps the main message space clean, and is more easily searched later.

## Email tips

- Start with a greeting and end with a salutation when sending an initial email. This is less important when replying.
- Be thoughtful about using *Reply to all*.
- Get organized with folders and rules.
- Reply in a timely manner—this is usually within a week, depending on the subject matter.

## **In conclusion**

Mastering the art of working remotely is the future, but now that we're faced with the Covid-19 pandemic, it has also been an immediate necessity for most companies and their teams, many of whom have had to make the transition overnight.

At InVision, we believe that design makes everything possible. And from our experience, we also believe that remote working makes everything possible—whether that's a 250-person three-day virtual kickoff meeting, or high-performing, cross-functional design teams collaborating across the world.

However, there's no denying that transitioning to remote work is a huge change and it's natural at first to feel anxious and worried about how things are actually going to work. To get it right, you need to be willing to try new approaches, fail, and continually iterate—slowly building that new remote work muscle—until you find what works best for you and your team.

We hope the tips and insights we've shared here will help you get started, and see remote not as a blocker to doing great design work, but as an opportunity to innovate and improve the way you communicate, collaborate, and build relationships with your team—ultimately bridging the gaps and bringing everyone closer together—despite the physical distance.



## Key takeaways

1. To build a strong remote work culture, you need to start by establishing trust and psychological safety with your teammates—the hallmarks of high performing teams.
2. Without effective communication, remote work falls apart. Over-communicating is our rule of thumb, but avoid creating too much noise by practicing intentional and purposeful communication. And choosing the right tool to communicate is as important as the message itself.
3. Standups are a vital ritual of any design team. By establishing a few ground rules and experimenting with what works for your team, remote can lead to better, more focused standups.
4. Creating an inclusive environment is one of the biggest challenges of remote work.
5. By developing new processes, such as how meetings are run, you can create an environment where everyone feels like they can contribute *and* are being heard.

## Further reading

[The Neuroscience of Trust](#)

[How Zapier is building a remote design culture](#)

[How to Build \(and sustain\) culture in a remote environment](#)

[6 things remote companies must do to build great culture](#)

[The best tip VMware's head of design has for making your next design meeting more inclusive](#)



## Chapter 5

# Remote work is here for good

The positive impact of working remotely

By Ben Goldman

This guide was written during the Covid-19 pandemic. As we all take social distancing measures to limit our potential exposure, companies are now immediately transitioning their workforces to remote. Amidst all the uncertainty about the pandemic's impact on the world, this move to remote has engendered even more uncertainty as company leaders and their teams struggle to cope with potential long-term impacts to their business. This provides an unusual context that may complicate the way many people perceive remote work, viewing it as a temporary emergency measure instead of an important milestone in the history of work.

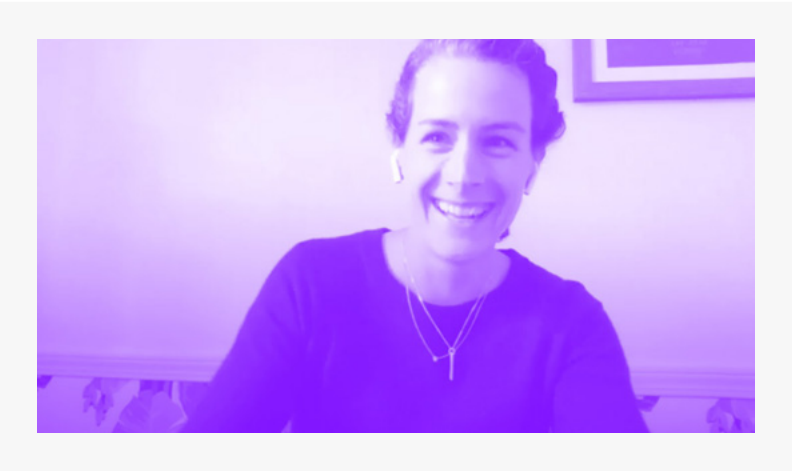
We believe this perception is a mistake.

Long before the current circumstances, remote work was already gaining momentum as a result of new digital collaboration technologies, and an increasing body of evidence that proves that remote workers are just as productive—and often more productive—as their co-located counterparts.

One famous study out of Stanford University followed 1,600 employees who recently transitioned to a work-from-home arrangement, and discovered a 13% increase in productivity.

Not only are remote workers just as (or more) productive as

those in an office, there are a number of additional business benefits. When employees are engaged, they're more productive, and they also stick around in their jobs longer, reducing turnover and absenteeism. This in turn reduces the amount of time managers have to spend navigating attrition in their workforce, freeing their time to focus on solving problems for the business and its customers.



Caitlin Wagner on collaborating with intention ([Watch online](#))

## **Consequences of the commute**

But speaking only to the business benefits of remote work doesn't do the topic justice. Because it's impossible to have a conversation about the benefits of remote work without

also discussing the insidious consequences of a particularly regressive feature of the modern world: the daily commute.

The detrimental effects of the daily commute on both personal health and the global environment are impossible to ignore. According to the World Wildlife Federation, transportation accounts for anywhere from a quarter to one-third of total greenhouse gas emissions in the United States, and driving is the single biggest source of emissions for the average American. But one need not look at the numbers to see the effects of commuting on our planet. Anyone who lives in a dense urban area is familiar with daily traffic jams, hazy skylines, and dangerous roads created by our car-centric society. And one of the immediately tangible silver linings of the recent global transition to remote work are the positive effects on the environment. For the first time in decades, the skyspace above major cities has returned to blue, canal water in Venice has cleared, and air quality has improved in cities around the world. Though these results are temporary—a side effect of the intentional slowdown of the global economy because of Covid-19—they provide a glimpse into how aspects of everyday life impact the environment.

Yet in addition to commuting's damage to the environment, its toll is most immediately felt on an individual level. Commuting impacts both our physical and psychological health, and the longer the commute the greater that impact becomes.

Some of these risks include increased blood pressure, cholesterol, anxiety, and risk of depression. One study out of Sweden even found that the relationships of those with a 45-minute or longer daily commute are 40% more likely to end in divorce—a staggering statistic that illustrates its consequences not just on the individual, but on the family as well.

One of the less talked about consequences of commuting is how it exacerbates income inequality by tying workers to major metro areas, such as San Francisco and New York, where the cost of living is often extravagant and home ownership is out of reach for many. As a result, increasing numbers of workers are forced to move to distant suburbs just to afford a home, paying the price instead through extreme commutes that further clog highways, degrade personal health, and damage the environment.

In light of all those consequences, it's no wonder that remote work has experienced marked growth over the past decade. One study found that 70% of knowledge workers now work remotely at least some of the time, and 57% of workers identify remote work as a top priority for perks offered by a business.

But most telling of all is that of the employees that have experienced remote work, 98% agree that they would like to continue to work remotely (at least part of the time) for the rest

of their careers.

## **Be good to one another**

Remote work is here for good. The consequences of the commute are too severe to ignore, and the benefits of remote work to the individual, their families, the business, and planet are too profound.

Though there are challenges to overcome when transitioning to a remote work environment, any of these challenges are solvable, and designers are uniquely equipped to solve these challenges thanks to a particularly valuable skill: empathy.

Empathy is what enables designers to put themselves in the minds of users, understand their pains, desires, and wishes, and design experiences that will improve the lives of the people using the technology they help create. In the context of remote work, developing empathy means appreciating the people on the other side of the screen—our colleagues—as human beings.

When faced with a new or unique challenge, try to maintain this focus on the human being when communicating and making decisions. Try to look past the text or video and appreciate what's lying beneath the surface of the screen, and empathize



with the experience of the person you're working with. If a problem or disagreement arises, default to conversation rather than assumption.

While these principles are worthy for any team, in any environment, they have never been more important than they are today. In a world of uncertainty, empathy has the power to refocus our attention on the important things.

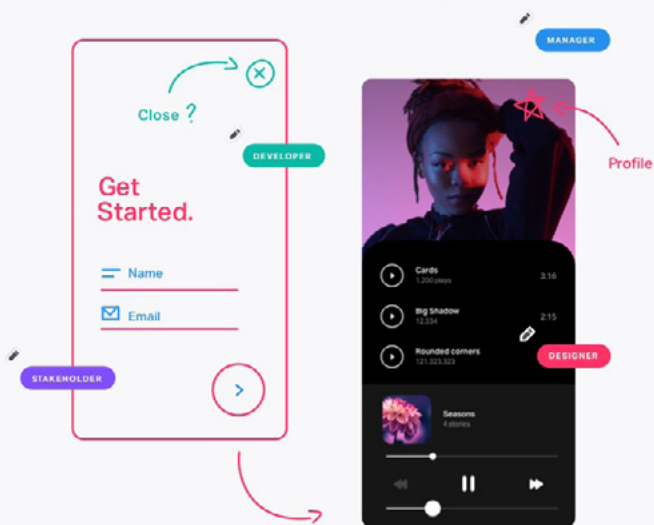
"My hope is that after all of this has passed, what we'll take back is an appreciation for what's important," says Stephen Gates, head design evangelist at InVision. "That this is a reset that allows us to see alternative ways of doing things, like being able to trust your employees, or that it's okay for leaders to be vulnerable. Because there's always been awareness of many of these problems. There just hasn't been a willingness to change. And now is that opportunity."

## **Further Reading**

[Remote work's next generation](#)



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