



How to Build and Manage a Remote Workforce

A top-to-bottom guide as you adapt to a changing business landscape

A high-angle photograph of a person with dark skin and curly hair, wearing a blue long-sleeved shirt, sitting on a light-colored sofa. They are looking down at a laptop screen which is resting on a small white round table. The room has a wooden floor, a black backpack with orange and red accents is on the sofa, and a smartphone is on the floor nearby. A yellow chair is partially visible on the left. A semi-transparent blue rectangle with a faint geometric pattern is overlaid on the lower half of the image, containing the text.

Introduction

It seemed to happen overnight. The workforce and business landscape have suddenly changed, thanks to a combination of global events and existing business trends. The writing is on the wall: companies are becoming more and more reliant on remote work, and that's not likely to change anytime soon.

But with changes happening so fast, many managers are struggling to keep up. The switch to remote processes doesn't necessarily come naturally. It takes planning and specific practices to smooth the transition. Betts Recruiting has put together this guide to mastering three key areas of remote work:

- ➞ Sourcing and Interviewing
- ➞ Onboarding
- ➞ Managing

Keep reading to become just as skilled at conducting these tasks remotely as you are at conducting them in person.



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The Challenge

Without a plan and a well-established system in place, the transition to remote work can be a mess. **This chaos can lead to delays that can cost your company revenue.** From interviewing to onboarding to managing, here are some of the challenges companies face when they lack a system or rush their transition.

Sales teams struggle

Not every sales rep gets all the benefits of working from home without hitting some challenges along the way.

1

Sales reps depend on internal communications

Every AE needs to have check-ins with their SDR. The sales team as a whole needs to be closely synced with other teams like Marketing, Product, and Engineering. Even with today's technology, those communications can slow down when teams go remote.

2

The “lone wolf” nature of sales isn’t always a good thing

Without oversight, how can you be sure your reps are adhering to your sales playbook? How do you ensure they don't deviate from your company messaging?

3

Sales teams may not grind as much without recognition

Sometimes, even commissions don't motivate reps to grind to their full potential. That's why companies have systems in place to ensure their SDRs, AEs, and Account Managers get in-person recognition for their efforts. Remote-work scenarios can deprive your team of that, which can negatively impact productivity.





Remote ramping & onboarding faces obstacles

Many of the things managers take for granted when onboarding on-site employees suddenly break when they have to onboard remotely.

1

There's no learning by osmosis

Managers can't simply provide skeletal training materials and expect reps to soak up the rest just by spending time in the office.

2

It takes longer to answer clarifying questions

If a new employee doesn't understand something, they have to follow up via email, Slack, or some other remote communication channel. Without vigilant monitoring of these channels, it can take much longer to respond to them.

3

Errors or misunderstandings go undetected

A number of opportunities for correction happen just by overhearing a misstated value prop on a sales call or other chance observations. Those opportunities disappear when you go remote.

Step 1: Sourcing & Interviewing

When sourcing candidates for a remote position, here are some qualities to look for:

1

Culture fit

Just because you're going to be interviewing and managing this person remotely, and they're going to be working remotely, doesn't diminish the importance of a great culture fit. More on this later.

2

Experience working remotely

Those with prior experience will have the skills necessary for successful remote work: over-communication, problem solving, decision making, etc.

3

Great for the role

Your management of this person will be very hands-off. You need to be 110% certain they understand the role, and are qualified for it, before hiring them.



The golden interview principles: Clarity & planning

It's essential to hone your interviewing skills if you're expecting many, or all, of your upcoming interviews to take place remotely. Remote interviewing takes particular precision and planning - and it must be a comprehensive process.

Here are some steps for ensuring you bring the appropriate clarity and detail to your remote interview process:

- 1 Create a very clear and intentional interview process**

Every person involved should be briefed carefully on this hire.

- 2 Make sure you've got the right interview team**

What internal people are you bringing into the interview process? Why are they involved? Do each of them know the function, what you're looking for, the gap you're filling, and the right skills and behaviors to vet for?

- 3 Know the role inside and out**

How clear is the function of the role? Can you articulate specifically what you're looking for, the problem this role is solving, and the skills and behaviors required to successfully execute?

- 4 Utilize an internal scorecard**

Internal scorecards are more important than ever. Interview questions shouldn't be arbitrary - they should be intrinsically tied to uncovering not just whether this person can do the job, but if they can do it in your environment and culture.

- 5 Test for resilience and autonomy**

In this changing business landscape, resilience is more important to measure than ever, as is the ability to self-motivate. How are you incorporating this into your interview process?

These principles should permeate every aspect of the interview process. The questions that each interviewer asks should be vetted against this criteria.

"Remote interviewing takes particular precision and planning - and it must be a comprehensive process."

Steps for a perfect remote interview process

Once you get your team in order, it's time to execute an interview process designed specifically for remote work. Here's what that looks like. Remember: this will all take place over the phone or video conferencing, so make sure all the technology you need is set up, and reliable, beforehand.

01

1ST CALL

Start by screening for pain points you're trying to solve and the ideal scenario you're looking for. If the candidate can't meet these needs, they won't be a long-term fit.

02

VIDEO SUBMISSION

This will give you a sense of the candidate's style, skills, and thought process outside of a structured interview environment.

03

2ND CALL

Here, the manager should try to learn what resources the candidate needs to succeed, and their philosophy around people and culture. This will give a strong sense of how they work in remote environments.

04

3RD/4TH CALL

People both above and below the candidate on the team hierarchy can join this call. Make sure the interviewers are clear about their objectives, and that they understand the role and how to qualify the candidate. These are also culture checks.

05

PANEL INTERVIEW

Panelists should include more senior people, and can be drawn from any team in the company that the candidate will engage with in a meaningful capacity.

06

5TH CALL

The candidate gets on the phone with an individual whose insights and opinions are trusted within the organization. It can be a board member, executive, etc.

07

6TH CALL

It's now time for the candidate to talk to the CEO. Here, it's key to remember that the candidates are also evaluating you - not just the other way around. This is their chance to ask about strategy, vision, challenges, etc. It's more important than ever they feel bought in.

08

FINAL CALL

Conclude the process with one more call with the direct line manager. At this point, there should be mutual interest and the candidate should be able to very clearly articulate why they want to work at your company, how they see it playing out, and when they can start making an impact.

Useful interview questions

The interview questions you ask will depend upon the role you're trying to fill. But when interviewing remotely, and for remote positions, here are a few go-tos that are useful for just about any role.

1 “What’s your preferred communication channel?”

In a remote job, you can't just walk over to an employee when you need something. But you still need prompt answers. Find out which remote communication channel – Slack, email, impromptu Zoom call, or even text message – your candidates respond the most quickly to, and why.

2 “What’s your daily schedule?”

You can't expect an employee to be at their desk and available every second of the day. Find out when they usually take breaks to make sure it works with your team's workflow. And look out for candidates who cop to taking too much personal time during the workday.



3 “Describe some successes you’ve had when working remotely.”

Try to get a sense of whether the candidate has been able to hit the same metrics, on the same timelines, when working remotely as when working in an office. Different environments affect people's workflow - make sure going remote doesn't weaken the candidate's performance.

4 “What’s your protocol when you hit a snag?”

You're looking for someone whose instinct is to figure out a problem on their own before asking for help. You'll inevitably be more hands-off as a manager when everyone is remote, so you won't necessarily be available right away to help an employee out with something.

“Most of your anxiety around a remote experience is unfounded. You can do it remotely, you just have to think it through first.”



Shane Price
Sales Enablement
 Outreach

Step 2: Onboarding

Betts Recruiting surveyed our partners to better understand their expectations when it comes to ramping and onboarding new reps. Here's a sample of the results:

- ➔ 66% of managers expect newly-hired AEs to start pacing toward quota within a quarter
- ➔ For AEs promoted from SDR, that figure rises to 79%
- ➔ Of those, some managers expect AEs to pace toward quota within the first month or 2

Without a detailed, comprehensive, and well-established remote onboarding process, this timeline will extend. But don't panic. As Shane Price, who runs onboarding at Outreach, puts it: “Most of your anxiety around a remote experience is unfounded. You can do it remotely, you just have to think it through first.”

Your remote onboarding regimen should...

...include:

- ➔ Detailed list of contacts: Who to reach out to for what information
- ➔ 1-to-2-week schedule of training meetings
- ➔ Ample resources for self-teaching

...cover:

- ➔ Product: functionality, value props, etc.
- ➔ Competitive info: differentiator, big names, etc.
- ➔ Sales playbook

Building a successful remote onboarding program:

1 Planning

Review your in-person onboarding process: What parts **do not** work remotely? For example, when you're not all physically together, you can't feel out a room or pick up on a vibe. And impromptu whiteboarding is out of the question.

To make sure everyone is following along and on the same wavelength, ask probing questions throughout your virtual onboarding presentations. And make sure structured content can fill the time, so that you're not reliant on impromptu moments that aren't feasible in a remote setting.

2 Pre-boarding checklist:

Smart onboarding starts before Day 1.

- ✓ Evaluate your tech stack. Does everything work together nicely?
- ✓ Make sure employee access to all systems is set up in advance of their start date.
- ✓ Avoid disruption: When you send computers and other equipment to new hires, make sure it arrives several days before their start date.

3 Essential components:

Onboarding programs will differ by company, team, and role. But all of them should incorporate these elements:

- ✓ 90-day plans: Have hires create plans based on their individual role
- ✓ Variation: Blend live virtual sessions with online self-teaching resources
- ✓ The lighter side: Schedule lunch/coffee breaks, happy hours, and self-guided time

Remember: Even remotely, you can still make onboarding interactive. The use of video conferencing doesn't preclude real-time activities or comprehension exercises. You can also give homework assignments at the end of your onboarding webinars.



Step 3: Managing

Remote management is a constant process. It doesn't end when a new employee is ramped and onboarded. Here are some best practices for managing remotely once your team is up and running.

1 Optimize your technology

In a remote work scenario, technology is your best friend. But it's crucial to ensure you're leveraging it in a way that's tailored to having a successful remote team. Create a sales-and-marketing Slack channel to keep the communication flowing for sales enablement requests and other essential communications. Then do the same for other teams. In addition to obvious uses of technology like Zoom, consider implementing texting into your team culture.

2 Record your team's sales calls

Under normal circumstances, managers largely detect opportunities for correction and optimization organically: they hear it from their desks, or happen to walk by a sales rep right as that rep deviates from company messaging.

In remote scenarios, these opportunities fly under the radar. To address this, managers can periodically have their reps send over recordings of their calls. Managers can then listen at the end of each week to make sure the team is aligned and consistent in their messaging, and that they're following the playbook.

2 Make the weekly, daily

To ensure productivity among remote teams, leaders may have to rely on metrics even more than usual. Many companies already hold SDRs to daily call quotas – maybe it's time to hold AEs to daily quotas too, as well as other, non-sales employees. It could be calls made, emails sent, accounts touched, or something else.

The same applies to meetings: Team check-ins can move from weekly to daily. One-on-ones can increase in frequency as well.

“Create a sales-and-marketing Slack channel to keep the communication flowing for sales enablement requests and other essential communications. Then do the same for other teams.”



Nurturing your team & company culture

Even at the best of times, working from home is a major change in the way people communicate. With the loss of incidental communication, such as overhearing someone's conversation or chatting in the hallway, your staff is working with less information. Human Workplaces Culture Designer Jamie Notter says managers should be mindful of three cultural elements when managing a newly remote team:

1

Conflict

Companies that have a healthy approach to conflict will fare better in a remote world.

2

Proactive transparency

To ensure a healthy approach to conflict, Notter suggests the practice of sharing information before you're asked, and implementing systems to make information more available.

3

Hierarchy

Newly remote managers are sometimes surprised by how much their physical space reinforces lines of power.

Your aim should be to replace the watercooler chats, one-on-one check-ins, bowling night, and team retreats in a digital form. Actively cultivate opportunities for team members to connect on things that aren't directly related to the work.

This can mean establishing recreational activities like games or happy hours over video chat, or creating a Zoom event that people can log into while they work, so that casual chat can continue. It can also mean enabling self-expression on workplace chat services like Slack.

Source: [Human Workplaces; Everyone Working from Home? Check Your Culture; Jamie Notter; March 10, 2020](#)

A woman with curly hair is smiling and looking at a laptop screen. She is wearing a yellow shirt. The background is a bright office with large windows. A blue semi-transparent box is overlaid on the left side of the image, containing the text.

Conclusion

The accelerating shift to remote work is affecting managers and teams everywhere. Those that put well-thought-out systems in place, in a timely fashion, to adapt to this shift will be best positioned to succeed in a transforming business landscape.

Good luck!

Let's Get In Touch

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