

Leading Remote & Hybrid Teams — Workbook

This workbook accompanies the Leading Remote & Hybrid Teams course and gives you practical exercises, structured reflection tools, and reusable templates to apply each module's concepts directly to your team. Complete each section after finishing the corresponding module — the exercises are designed to produce real artifacts (a team communication charter, a 1-on-1 template, an OKR dashboard) that you will use in your management practice, not just in this course.

Communication Architecture for Distributed Teams

Build your team's communication charter — a single document that defines channels, response norms, and escalation paths so every team member knows exactly how information flows.

Exercise: Channel Audit: Where Does Information Actually Live?

Before designing your future-state communication architecture, you need an honest picture of your current one. This exercise maps where information currently lives — and surfaces the gaps and redundancies causing friction.

- List every communication tool your team currently uses (Slack, email, Zoom, Teams, Notion, Jira, etc.). For each tool, write one sentence describing how your team currently uses it — not how it is supposed to be used, but how it is actually used.

- Identify the two most common communication failures in your team right now. Examples: decisions made in Slack that no one documented, important context lost in email threads, remote members who missed a key decision because it happened in a hallway conversation. Be specific.

- For each failure you identified, which tier of the three-tier communication stack (Tier 1: persistent record, Tier 2: async threaded, Tier 3: synchronous) should have handled that communication? What would the correct routing have looked like?

- What is the single most confusing channel-usage question your team faces regularly? (Example: 'Should I send this in Slack or email?') Write the answer you wish existed as a one-sentence norm.

Worksheet: Team Communication Charter

Complete every field to produce your team's communication charter. Publish this document in your team wiki within one week of completing this module. Review and update it quarterly.

Team name and manager name

Tier 1 tool (persistent record — e.g., Notion, Confluence): tool name + URL

What must always be documented in Tier 1 (list 4-6 categories: decisions, project specs, policies, etc.)

Tier 2 tool (async threaded — e.g., Slack, Teams): tool name + workspace/channel structure

Response window norm for Slack/Teams DM (hours)

Response window norm for Slack/Teams channel mention (hours)

Response window norm for email (hours)

How to signal urgent/emergency (channel name or protocol)

Tier 3 tool (synchronous): platform name

Standing synchronous meetings (name, frequency, duration, purpose)

When to use async video (Loom) instead of scheduling a meeting — your team's specific trigger list

Decision logging process: who is responsible for documenting decisions made in live calls?

Date this charter was last reviewed

Checklist: Communication Architecture 30-Day Launch Checklist

- Draft the team communication charter using the worksheet above
- Share the draft with the team and invite async comments for 48 hours before publishing
- Publish the final charter in your Tier 1 tool with a clear URL that the team can bookmark
- Announce the charter in your primary Slack/Teams channel with a 2-sentence summary of the key norms
- Set a calendar reminder to review the charter in 90 days
- Introduce the response-window norms in the next team sync and invite questions
- Create or designate a Tier 1 space for decision documentation if one does not exist
- Identify and train whoever is responsible for archiving decisions from live meetings

Building Trust and Psychological Safety Across Distance

Map the current trust levels on your team, design an improved 1-on-1 structure, and identify the specific safety barriers that prevent your team from speaking up.

Exercise: Trust Mapping: Who Trusts What on Your Team?

Use this exercise to assess the current state of trust across your distributed team — not as a performance evaluation, but as a diagnostic tool to identify where your energy as a manager is most needed.

- For each of your direct reports, rate your confidence in the three components of remote trust on a scale of 1-5 (1 = low confidence, 5 = high confidence): Competence trust (can they do the job?), Benevolence trust (do they believe I have good intentions toward them?), Integrity trust (do they trust me to do what I say?). What patterns do you notice across the team?

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- Think about the last time a team member surprised you with a problem that had been building for a while — something they had not told you until it was serious. What was the barrier to earlier disclosure? What would have needed to be different for them to tell you sooner?

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- Which of your remote team members do you know the least about as a human being — their interests, their home situation, their career motivations? What does that gap cost the team?

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- Write one specific, actionable thing you will do in the next two weeks to strengthen trust with the person you

are least connected to on your team.

Worksheet: 1-on-1 Design Template

Design your standard 1-on-1 format for your distributed team. Use this template for all direct reports, with minor customization per person. Store the running log in a shared document accessible to both you and each report.

Direct report name

Meeting frequency (weekly / biweekly) and duration

Platform and standing link (Zoom, Teams, Google Meet)

Check-in opener you will use (a personal question you will adapt each week)

Their agenda section: prompt you give them to prepare (e.g., 'What is most on your mind this week?')

Growth question you rotate every other week (e.g., 'What skill are you building right now?')

Manager topics section: your standing items or this week's items

Action item format: who, what, by when — how you will track these between meetings

Running log location (URL of shared doc)

How you will ensure you reference previous action items at the start of each meeting

Checklist: Psychological Safety Audit Checklist

- In the last month, has a team member raised a concern or disagreed with a decision in a team channel or meeting? If no, investigate why.
- After the last team meeting, did every person — including the quietest remote participant — contribute at least once? If no, introduce a structured round for the next meeting.
- Do you have a low-stakes channel or document where ideas can be shared without immediate evaluation? If no, create one this week.
- In the last quarter, have you publicly acknowledged a mistake or changed your mind based on team input? If no, create an opportunity to do so.
- Do you use any anonymous feedback mechanism (Mentimeter, Google Form, Lattice) at least quarterly? If no, schedule one for this month.
- Does your team have a functioning retrospective practice? If no, schedule the first one and commit to a cadence.
- Have you told each direct report explicitly that you want to hear about problems early, not late? If no, do so in your next 1-on-1.

Exercise: Designing Your Team's First Remote Retrospective

If your team does not have a retrospective practice, this exercise helps you design and facilitate your first one. If you already run retros, use this to audit and improve your current format.

- What time period will your retrospective cover (last sprint, last month, last quarter)? What are the two or

three most significant events from that period that the team should reflect on?

• Which format will you use: a live synchronous session (recommended for your first retro), a fully async written retro (using a Miro board or Notion template), or a hybrid format? Write a one-paragraph rationale for your choice given your team's time zones and working styles.

• How will you ensure that quieter team members — especially remote ones — contribute equally? Describe the specific facilitation technique you will use (e.g., anonymous voting, silent brainstorm before discussion, structured round-robin).

Accountability and Performance Without Micromanagement

Write your team's first OKRs, design your weekly operating rhythm, and build the frameworks you will use to address performance issues remotely with clarity and care.

Worksheet: Team OKR Planning Sheet

Use this worksheet to draft your team's OKRs for the next quarter. Complete it before your team OKR-setting meeting so you arrive with a draft to refine collaboratively. Target 2-3 team-level objectives with 2-4 key results each.

Quarter and year

Team name and primary function

Company-level objective this team is most directly contributing to

Team Objective 1 (qualitative, inspiring, 1 sentence)

Key Result 1.1 (measurable, time-bound, format: verb + metric + target + date)

Key Result 1.2

Key Result 1.3

Team Objective 2 (if applicable)

Key Result 2.1

Key Result 2.2

Team Objective 3 (if applicable)

Key Result 3.1

Key Result 3.2

Where will OKRs be published and made visible to the team (URL)?

Weekly check-in format: how will the team report progress on key results?

End-of-quarter review date

Exercise: Weekly Rhythm Design

Design your team's weekly operating rhythm by completing these prompts. The goal is to create a lightweight system that gives you full visibility into your team's work without requiring your team to attend more meetings.

- Write the exact template you will give your team for the Monday intention post. It should take under 5 minutes to complete and should cover: top 3 priorities this week, anything from last week that is carrying forward, and any decision or resource you need from the manager.

- Write the exact template for the Friday wrap-up post. It should cover: what was completed, what was not completed and why, and any blockers for next week. Add one question you will ask yourself as manager when you read these: what would cause me to reach out directly versus let it pass?

- Your weekly team sync should never be used for status updates. List exactly five types of conversation that belong in your live sync (examples: decisions requiring group input, creative problem-solving, team connection). Then list three types of conversation you will explicitly remove from the agenda.

Checklist: Remote Performance Management Readiness Checklist

- Every direct report can articulate their top three priorities this quarter without asking you
- Every direct report has written, documented goals that both of you have agreed on
- You have a written record of the last performance conversation you had with each direct report
- You have a defined process for what happens when a key result is missed two weeks in a row
- You can describe the difference between a Direction problem, Development problem, Drive problem, and Disruption problem — and you know which you are facing for each underperforming team member right now
- Every performance conversation in the past six months has been followed by a written summary shared with the employee within 24 hours
- You have reviewed your most recent performance ratings and asked yourself: would this person's score be higher if they were in-office? If yes, investigate why.

Inclusive Hybrid Meetings and Remote Culture

Redesign your hybrid meeting setup, build a team ritual calendar, and run a structured proximity bias audit on your own management behavior.

Worksheet: Hybrid Meeting Design Sheet

Complete this worksheet for each of your standing meetings to assess and improve the remote experience. Start with your most important recurring meeting (team sync, decision meeting, project review).

Meeting name and standing frequency

Typical number of in-room participants

Typical number of remote participants

Current room setup: camera type, mic setup, screen visibility for remote attendees

Gaps in current setup (what can remote participants not see or hear that in-room participants can?)

Planned equipment or room changes to address gaps

Facilitator role: who currently facilitates, and do they have explicit responsibility for remote inclusion?

Chat monitor role: is someone assigned to surface remote contributions in real time?

How agenda and pre-reading are distributed (tool, timing)

How decisions are documented during the meeting (not after)

One facilitation technique you will introduce to give remote participants equal voice (round-robin, structured brainstorm, etc.)

Will you pilot the all-remote rule for any upcoming high-stakes decisions? If yes, which meeting?

Exercise: Team Ritual Design Sprint

Design three rituals — one connection, one celebration, one reflection — that fit your team's actual working patterns and will survive a busy quarter without falling apart.

- Connection ritual: Think about the informal moments that build the strongest friendships in your team. What do those moments have in common (shared interests, humor, vulnerability, learning)? Design a weekly or biweekly async ritual that creates one of those qualities. Describe it in enough detail that a new team member could participate independently without explanation.

- Celebration ritual: Think about the last time your team accomplished something meaningful. How was it recognized? Was every team member — including remote ones — included in that recognition? Design a recurring celebration practice that ensures remote contributions are as visible as in-office ones.

- Reflection ritual: Your team needs at least one recurring moment to evaluate how it is working together, not just what it is producing. Design a quarterly team reflection session: the format, the questions, who facilitates, how the outputs are documented and acted on.

Checklist: Proximity Bias Audit Checklist

Review the last five stretch assignments you made — were remote employees proportionally represented relative to their share of your team?

Review the last quarter's performance feedback records — do remote employees have as many documented feedback moments as in-office employees?

Review the last three promotion or significant raise decisions — can you identify any role that visible presence played versus documented output?

In the last six months, have you sponsored a remote employee for a high-visibility opportunity (project lead, presentation to senior leadership, cross-functional initiative)?

Ask two remote team members directly: do you feel you have equal access to the information, feedback, and opportunities you need to advance? Document their answers.

Review your calendar for the last month — how many informal 1-on-1 conversations did you have with in-office versus remote team members?

Identify one specific structural change you will make in the next 30 days to reduce proximity bias in your team (specific meeting change, assignment rotation, feedback frequency adjustment, etc.)

Your Action Plan

1. Within 48 hours: Complete the Channel Audit exercise and identify the single highest-friction communication problem on your team
2. Within 1 week: Draft your Team Communication Charter using the worksheet and share it with your team for 48-hour async review
3. Within 1 week: Redesign your 1-on-1 format using the 1-on-1 Design Template and introduce the new structure to each direct report individually
4. Within 2 weeks: Publish your final Team Communication Charter in Tier 1 and announce the new response-window norms to the team
5. Within 2 weeks: Schedule and facilitate your first team retrospective if you do not currently run them, or conduct an audit of your existing retro format
6. Within 30 days: Draft your team's OKRs for the next quarter using the OKR Planning Sheet and run a collaborative team session to finalize them
7. Within 30 days: Design and introduce your weekly operating rhythm (Monday intention posts, Friday wrap-ups, restructured team sync agenda)
8. Within 30 days: Complete the Hybrid Meeting Design Sheet for your most important standing meeting and implement at least two concrete improvements
9. Within 60 days: Launch at least one new team ritual (connection, celebration, or reflection) and evaluate its uptake after four iterations
10. Within 60 days: Complete the Proximity Bias Audit Checklist and identify one structural change you will make to ensure remote employees have equal access to opportunities and advancement

