Field Guide to

REMOTE COLLABORATION DESIGN

www.remotefieldguide.co

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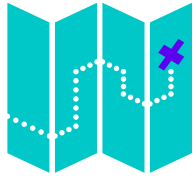
Why a Field Guide?

With this guide, you're equipped to identify and resolve any issues that might be keeping your team from collaborating remotely as productively, effectively, and enjoyably as possible.

Dear Leader,

The internet is flooded with articles and webinars sharing tips and tricks for making remote work better. But these one-size-fits-all checklists can be overwhelming and might miss the mark.

That's where this Field Guide comes in. Rather than starting with catch-all lists of potential solutions, we'll start by **identifying the problems *you're* actually trying to solve**. The needs your team really has. The pain points you're experiencing here and now. From there, **you'll design, test, and implement solutions** that address those needs and actually work for your team.

You might be struggling to maintain the level of **communication** you want. Your team might be overly **stressed**. You might be putting off important **creative work** for when you can do it in person. Your team might have **meeting and/or screen fatigue**. Whatever may be causing your team's stress, overwhelm, or reduced effectiveness, this Field Guide will help you create a clear path for improvement.

Much of what teams struggle with can be addressed through simple conversations and simple actions. This guide provides structure to have those conversations and then design meaningful solutions. Follow the instructions word for word or borrow just enough to have the conversations you need to have. **There's no right or wrong – there's just what works best for you and your team.**

Good luck, and reach out if you'd like extra guidance or support along the way.

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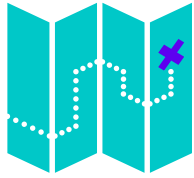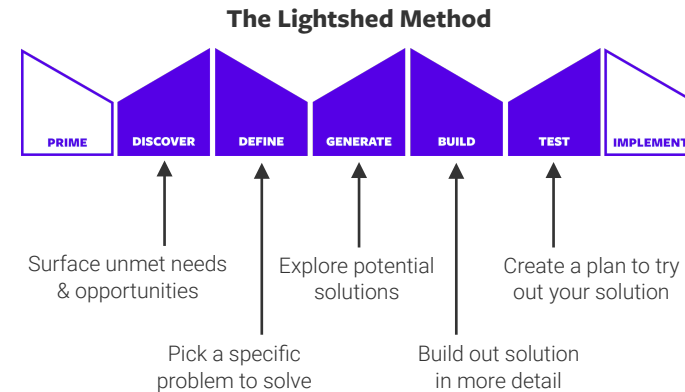
Setting the Stage

While this Field Guide is robust, the process it follows is straightforward. Use the tips and process snapshot below to help lay out your path before you dive in.

How to Use this Field Guide

- Select **one facilitator** who will guide the team, keep time, and decide when to move on. This person should get to know the full Field Guide before the session.

- Go to **www.remotefieldguide.co** to find additional resources including **facilitation videos** that you may use as inspiration & clarification or incorporate them directly into your process.

- Use whatever **tools** make most sense for you, for both the individual and group activities. Some options include:
  - MURAL or Miro
  - Zoom whiteboards
  - Google Slides or Docs
  - Paper/Notebook

- Set aside at least **90 minutes** to work through this guide.
  - Suggested times are shown at the top of each page. Feel free to adapt as needed for your team.
  - **Set a timer** for each step (a great role for the facilitator).
  - Prioritize completing the full design cycle in the time you have. While you can make this a longer activity (e.g. you might try a half-day or an hour a day for a week), it can be done in as little as 90 minutes.

- This is a **repeatable process** you can apply to any other challenges that arise. Whenever you uncover a new issue, use this Field Guide to address it, step by step.

Previewing the Process

In this Field Guide, you'll apply the *Lightshed Method*, our process for design & innovation, to improve your team's remote work. A simplified overview of each practice is shown below:

The Lightshed Method

PRIME   DISCOVER   DEFINE   GENERATE   BUILD   TEST   IMPLEMENT

Surface unmet needs & opportunities

Pick a specific problem to solve

Explore potential solutions

Build out solution in more detail

Create a plan to try out your solution

Sample 90-minute Session Agenda:
- DISCOVER: 9:00 - 9:15
- DEFINE: 9:15 - 9:40
- GENERATE: 9:40 - 10:05
- BUILD: 10:05 - 10:20
- TEST: 10:20 - 10:30

PRO TIP: *To shorten the group meeting time, you might ask team members to complete DISCOVER on their own prior to the session (see next page).*

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DISCOVER: Reflect

Use the prompts below to reflect on potential opportunities for improvement. These reflections are the catalysts for conversations that will help you focus your collaboration design effort.
Suggested time: 15 minutes

1) Reflect Individually

Have each team member write down their thoughts on the following prompts. Consider factors like communication, collaboration, productivity, alignment, autonomy, motivation, and so forth. Capture whatever comes to mind first - don't overthink it.

- What's **working** well for me about our collaboration?

- What's **not working** so well for me about our collaboration?

- What, if anything, should we **stop** doing?

- What, if anything, is **missing** from our collaboration?

- What **one thing** is causing most of my stress?

PRO TIP: *You can turn this from an individual reflection into an interview by pairing up and taking notes on each other's answers. This opens up the opportunity to dig deeper and ask "Why?" along the way.*

2) Identify Highlights

Ask everyone to review their responses and highlight, circle, or list whatever stands out most. Nothing is too small to highlight; if it's causing stress or reducing individual or team effectiveness in any way, then it matters.

To help define "whatever stands out most," you can ask:
- *What has **changed most** due to remote work?*
- *What would have the **biggest impact** on our work?*
- *What feels **easiest to address** right away?*
- *Which things affect you most **personally**?*
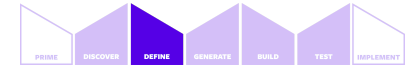- *Which things do you think **affect the team** most?*

NOTE: *Since these are individual activities, you could ask team members to complete DISCOVER (Steps 1 & 2 above) on their own and then come together as a group for Step 3 and beyond.*

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DEFINE

DEFINE: Identify Needs & Opportunities

You've surfaced your team's "data" - now it's time to make sense of it. In this step, you and your team will define key unmet or undermet needs when it comes to your collaboration.
Suggested time: 25 minutes

3) Share & Discuss Reflections

Have everyone share their highlights and jot down anything that stands out. Dig deeper to uncover insights about underlying causes or factors.

Ask questions like:
- *What do you **wish were different** about that?*
- *What's **causing that** to be a problem?*
- ***Why** is that happening/not happening?*
- ***Say more** about that…*

PRO TIP: *This would be a great time to introduce your online collaboration tool of choice (e.g. MURAL, Miro, Google Docs, etc.) to capture highlights.*

4) Extract Needs

From your discussion, capture any specific opportunities, pain points, or needs that you identify.

Your list might look something like:
- *Can't brainstorm remotely*
- *Hard to keep track of each other's work*
- *Keeping in touch constantly is distracting*
- *We aren't having enough fun while we work*
- *Too much time sitting in front of a computer*

PRO TIP: *If you're having trouble agreeing on the importance of a given issue, ask: "What is this issue costing us?" or "What are we losing because of this issue?"*

5) Write an Opportunity Statement

Turn your identified need into a clear and focused opportunity statement. What you write down here will guide your work moving forward.

Looking back on the specific needs you identified in Step 4, **write down a few opportunity statements** in the form below:

We need a (better) way to _____.

Feel free to replace *(better)* above with something more specific and relevant to your problem – or simply remove it if you'll be working on something new. Your descriptors might be:
- *…more efficient…*
- *…more inclusive…*
- *…less distracting…*
- *…faster…*

Your opportunity statement might look something like:
- *We need a way to brainstorm remotely.*
- *We need a more concrete way to track our work progress.*
- *We need a less distracting way to stay in touch throughout our days.*
- *We need a better way to bring fun and play into our work.*
- *We need a way to reduce sitting screen time.*

Finally, as a team, **pick one opportunity statement** to move forward with.

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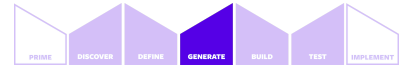
GENERATE

GENERATE: Identify Potential Solutions

Now that you've identified the real need you want to address and problem you want to solve, you can focus your energy on finding and/or creating relevant solutions.
Suggested time: 25 minutes

6) Write HMW Questions

Translate your opportunity statement into one or more "How might we…?" (HMW) questions. It can be a direct rewording of your opportunity statement, or you can break it down into specific factors and write HMW questions that target these specific factors.

Sample direct rewording:

> *We need a way to brainstorm remotely.*
> might become
> **How might we brainstorm remotely?**

Sample specific factor breakdown:

> *We need a more concrete way to track our work progress.*
> might become
> **How might we better visualize our progress?**
> **How might we provide regular updates about our progress?**
> **How might we celebrate small wins along the way?**
> **How might we centralize our progress tracking?**

When ready, **pick one HMW question** to move forward with.

PRO TIP: Even if you generate multiple HMW questions, focus your creative energy on addressing only one at a time. Solving one problem at a time well is better than trying to solve several at once poorly.
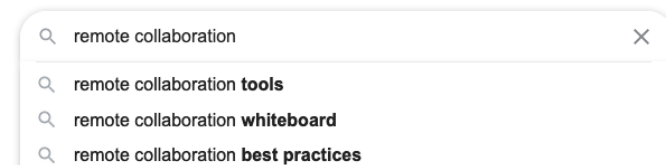
7) Brainstorm Solutions

Jot down all the ways you can think of to respond to your HMW question, individually or as a group (or both). Generate at least 10 different ideas before moving on to Step 8.
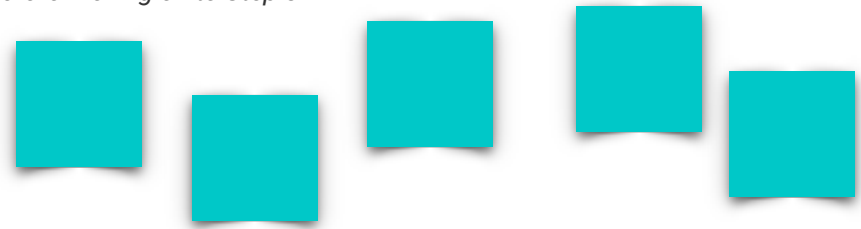
PRO TIP: This would be a great time to again use your online collaboration tool of choice (e.g. MURAL, Miro, Google Docs, etc.) to capture ideas.

8) Explore Additional Solutions

Now, supplement your initial brainstorm with some research. Here's where you'll explore those tips/tricks/strategies that are already out there. Once you do a little research, try revisiting Step 7 to brainstorm some more.

Google

🔍 remote collaboration   ✕

🔍 remote collaboration **tools**

🔍 remote collaboration **whiteboard**

🔍 remote collaboration **best practices**

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BUILD: Make Your Solution Real

You've identified ideas and strategies you believe will improve your team's collaboration.
Now, build out sketches and plans for what those will look like for your team.
Suggested time: 15 minutes

9) Select Your Solution

Through a team discussion, identify which of the brainstormed and/or researched solutions you'd like to try out.

To help decide on a solution to try, you can ask:
- *What would have the **biggest impact** on our work?*
- *What feels **easiest to address** right away?*
- *Which are we **most excited about**?*
- *Which solution might **indirectly resolve other issues** we've identified?*

Be sure to **align around one solution** you'd like to build out more concretely in the next step.

10) "Build" Your Solution

In whatever way makes the most sense given the nature of your solution and the nature of your team's work, create a tangible representation of your selected solution.

As inspiration for ways to make your solution real, consider:
- *Drafting new remote meeting protocols or norms*
- *Sketching out your new daily or weekly team calendar*
- *Making an agenda for your next remote brainstorm session, along with the tool you're going to try out*
- *Creating a pre-meeting checklist to maximize efficiency*
- *Writing a script for your meeting kickoff warm-up games*
- *Making a video modeling an ideal meeting, brainstorm, etc. that you can use to recalibrate when needed*
- *Building a plan for the team to learn new tools or use existing tools in new ways (e.g. Zoom, MURAL, Slack, etc.)*

Make sure your team reaches agreement on **what you'll be implementing** and **how everyone will contribute** to its success.

Before moving on, be sure you've **created something tangible**. Don't leave Step 10 without something you can concretely test.

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TEST: Implement & Iterate

It's time to try out your solution in the wild. Outline how you'll weave your solution into your work and lay out your plan for checking in and course correcting over the next few weeks.
Suggested time: 10 minutes

11) Implement

Develop a plan for what this new solution looks like in your everyday work, and decide when you'll hold quick check-ins to see how it's working for everyone.

Discuss concrete details to reach total alignment and clarity on what implementation of your solution will look like. If relevant, align clearly around questions like:

• **What** specifically are we doing?
• **Who** will be doing what?
• By **when** will we do it?
• What other **resources** do we need?

Then, be sure to schedule at least two check-ins over the next two weeks to course correct as needed.

12) Assess & Adjust*

In your check-ins, use the following prompts to assess your solutions. Do this as an individual reflection and then a team discussion. As before, team members can consider factors like communication, collaboration, productivity, alignment, autonomy, motivation, and so forth.

• What's **working** well about our solution?

• What's **not working** so well about our solution?

• What **new needs or opportunities** have surfaced?

• What **new ideas** do I have to improve our collaboration?

To conclude your check-in, **decide what if any adjustments you'll make** to your solution. Revisit the questions from Step 11 to define specifics as necessary.

***NOTE:** Hold off on this step until your first check-in, after you've had some time to "field test" your new solution. These questions will help you identify ways to improve your solution after some initial testing.*
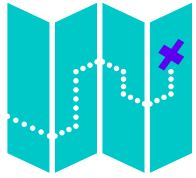
Looking Ahead

You're now equipped with not just this Field Guide, but a(nother) design cycle under your belt. Collaboration design isn't easy, so kudos for taking it on (and getting this far). Now what?

Congratulations, and great work!

I hope this has been a valuable experience for you and your team. Keep in mind that this design work is **just the beginning**. Now comes the hard work of implementation, adjustment, and ongoing conversation with your teammates about what's working and what isn't. That's where **sustainable change** happens.

If you've found value from this Field Guide, **I'd love to hear your story**. Whether you followed it step by step or just found inspiration where you needed it, I'd be curious to know:

- Why did you decide to use this? What were you hoping to get out of it?
- What did you discover?
- What outcomes have you achieved or changes have you made as a result?
- What's next?

Finally, I'm always working to make Lightshed's resources even better for you. If you have any **suggestions, ideas, or ways you've adapted this content** that have worked well, shoot me an email with your thoughts.

Take care,

Taylor Cone
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*Learn more about our approach to collaboration design, innovation, and leadership development at **www.lightshed.co.***