Got Mobile Employees? Now What?

Effective performance management is important to the success of a mobile workforce

To assist in the transition and ensure the success of mobile employees, there needs to be a well thought-out process and plan in place. Similar to in-office workers, mobile employees require clear expectations, frequent check-ins and constructive feedback to be successful. The following documentation lays out some high-level steps for managers to use to successfully manage a more mobile workforce.

Start assessing your readiness to manage mobile workers with the tools in Attachments A and B.

Importance of trust

The trust between managers and employees is key. For an employee to be given the option of being mobile, the issue is whether there are sufficient examples in the employee's performance to indicate the person is willing and able to do what is expected in their position. If an employee works effectively in the office, there is a greater chance they will work effectively in a mobile setting.

Ensuring a clear understanding of responsibilities is also important. Review examples of standard responsibilities in Attachments C and D. By discussing these responsibility sheets with your employee, you will continue to build trust.

Managing by results

It is the supervisor's responsibility to effectively and equitably manage the performance of all employees, both on-site and mobile. Clear and consistent performance management principles should guide managers as they work with employees to create mobility options, including telework. The focus should be on the final product, not necessarily on the process used to develop it. Performance management involves two different objectives: stating attainable work goals and standards as well as reviewing performance and giving feedback.

To specify attainable work goals, these questions must be answered:
- What must be done?
- Why must it be done?
- How well must it be done?
- By when must it be done?
- What constitutes a job that is complete?

Be clear with employees on methods to assess their performance. Keep these four tried-and-true feedback guidelines in mind:
- Be specific about what the person did. Subjective comments such as "this is sloppy work" are vague and unhelpful.
- Limit feedback to priority work products. Begin with the changes that will account for the most improvement and most value. Remember to provide positive feedback when work is done well.
- Provide timely feedback.
- Give positive and negative feedback.

There are many tools to assist in communicating performance expectations. A [Performance Development Plan](#) is a good template for annual reviews, but frequent check-ins and updates are helpful. A useful tool to document these check-ins is the Bi-weekly Performance Evaluation form, found in Attachment F.

Developing work plans and task schedules

When giving assignments to employees, regardless of their location, clearly define what needs to be accomplished and the accompanying schedule.

A structured work plan greatly reduces the chance that the employee will go off course. Works plans also give the manager an opportunity to coach and develop the employee by involving them in the process of plan development. And a work plan makes it easier to assess performance.

Structured work plans can involve:
- Office objectives to meet
- Tasks to be accomplished
- Products to be developed
- Time frame for completing tasks
- Schedule for accomplishing interim milestones (for longer-term assignments)
- Who else needs to be involved and what resources may be needed
- Criteria or standards for evaluating performance

Work plans should complement performance management processes and procedures, not replace them. A sample template of a work plan is included in Attachment G.

Measuring productivity

The complex nature of much office work makes it hard to measure productivity. But that shouldn't stop managers from developing measures. Regardless of where they work, all employees should produce the same amount of work/number of products. Thus having measurements is essential. If there are no solid performance measures in place for staff, then enabling mobility could be a great opportunity for managers to begin developing them. You can measure productivity by establishing specific objectives for your employees to meet, both individually and as a group. You then measure the group's performance, and the performances of individual employees, according to how well they meet these objectives.

Components of productivity measures for knowledge workers include:
- Quality of work produced
- Quantity of work produced
- Timeliness of work products submitted
- Timely and appropriate communication with managers and coworkers
- Timely and appropriate responses to email, phone calls and requests from managers and coworkers
- Written or verbal progress reports or reviews

To assist in developing productivity measures for knowledge workers, here is a link to a Center of Business Practices article discussing [Measures of Project Management Performance and Value](). An Employee Quality Review form, found in Attachment H, may also assist in developing measurable metrics.

You can measure productivity for knowledge workers with consistent short check-ins, typically referred to as huddles. These can be in person or virtual. Daily huddles bring staff together to keep coworkers up to date on work activities and enable them to address issues as they occur. This frequent communication between a supervisor and subordinates places accountability on all members of a team.

Email is another method to assess productivity for mobile employees. An email sent at the beginning of an employee's shift could outline their daily activities/objectives. Email at the end of the shift could summarize tasks completed, unexpected items, tasks not completed and areas where additional assistance might be required.

A sample of this type of email is in Attachment I. Some of these tools may work for a particular team but not your team. Most tools are permanent solutions but some maybe implemented on a temporary basis. The trick is to use what will benefit your team.

Evaluating/revisiting expectations

Although performance evaluations are typically undertaken on a limited basis, more frequently conducted evaluations based upon changing workloads/assignments are recommended. If an employee is not performing up to expectations, responding in a constructive and timely manner is indicated. Focus the conversation with the employee on possible solutions and expected results to alleviate the problem.

Solutions may include one or a combination of:
- Better-defined expectations
- Setting a time frame for the employee to demonstrate an improvement
- Resolving other circumstances that may have contributed to the unsatisfactory performance
- Rescinding the mobile arrangement

If a mobile employee is no longer successful in their arrangement due to a performance issue, then the agreement can be canceled in accordance with agency policy. These cancellations require proper notice to the employee and should occur only after reasonable attempts have been made to resolve the issue(s).

Attachment A: Supervisor Self-Assessment – Managing Mobile Staff

Supervisors will want to consider the effect of managing mobile employees on their supervisory and communication styles. Some supervisors require more interaction with staff members while others prefer to let employees pursue their work with little direct supervision.

Either style can work in a mobile arrangement if plans and procedures are established to respond to these style issues. While there is no "one best style" of management for supervising mobile employees, it is important to include work style considerations as you transition. Your sensitivity and patience during everyone's adjustment (including yours) to a new arrangement will contribute to its success.

Answer the following questions to assess your own supervisory style and expectations. In providing answers, consider what, if any, actions you should take to ensure that your style and expectations promote mobility for employees.

1. How much autonomy do your employees current have, whether they are mobile working or not? How much autonomy do they want?

2. Do you have performance expectations in place for your employees, regardless of whether they are mobile working? How will you respond if positive or negative changes occur in employee performance, morale or collaboration?

3. How will you keep mobile workers connected to your workplace culture and informed about what is happening in the office?

4. Considering the nature of your employees' work, what is the maximum amount of time you would want them to mobile work?

5. How will you manage perceptions of fairness if some employees, but not all, are allowed to mobile work? Is this a concern?

6. How will you supervise employees that are dispersed across different locations? What changes do you think you'll need to make to your supervisory style?

(Adapted from Maryland's Department of Budget and Management
www.dbm.maryland.gov/employees/telework/Pages/TeleworkHome.aspx.)

Attachment B: Management Behaviors

- **Do** trust your employees.

- **Do** be certain that you and your employees complete any program surveys or feedback forms.

- **Do** use your mobile arrangements to optimize your management skills.

- **Do** manage by results.

- **Do** try being mobile yourself when you have the opportunity. It offers insight to benefits and challenges.

- **Do** try to see things from the employee's perspective.

- **Do** keep your mobile staff in mind when setting program goals.

- **Do** delegate work fairly in daily activities. Keep an eye out for mobile workers who feel isolated.

- **Do** encourage communication between a coworkers and customers and mobile workers.

- **Don't** make curfew checks.

- **Don't** check on mobile employees every hour for status updates.

- **Don't** ignore or neglect your mobile employees.

- **Don't** set up unrealistic deadlines.

- **Don't** ignore problems.

- **Don't** set unreachable goals.

- **Don't** expect perfection; adjustments are inevitable.

- **Don't** allow one unsuccessful experience effect the program's reputation.

- **Don't** expect everyone to be successful at mobile work.

- **Don't** talk about mobile employees like they are off work. Mobile workers are working and available and responsive.

(Adapted from Telework Virginia http://www.teleworkva.org/.)

Attachment C: Manager Responsibilities

1. *Supervisor self-assessment:* All supervisors should complete the self-assessment in Attachment A.

2. *Agency's telework policy:* If you will be supervising teleworkers, you need to be familiar with your agency's telework policy and applicable collective bargaining agreements. This helps ensure that all telework agreements are in compliance with requirements and regulations. If an employee is interested in telework, you should refer them to the policy so they have an opportunity to review it.

3. *Clear expectations:* Similar to office-based workers, employees who telework, require clear expectations.

4. *Clearly discuss what is expected of your teleworkers in terms of work procedures.* As with any kind of work arrangement, ensure a mutual understanding of work assignments, expected products and required time frames. Telework removes some opportunities for casual communication encounters where work goals and progress can be discussed "on the fly." Those casual meetings should be replaced by more deliberate discussions, which may require planning in advance.

5. *Equitable expectations/performance standards:* Although teleworking may allow employees to be more efficient because they are working with fewer distractions, there should not be a change in the quantity of work you assign, changes in your expectations or changes in performance standards. Telework does not change an employee's job responsibilities. It simply changes where the work gets done.

6. *Performance management:* Performance management techniques create a results-oriented approach that help managers to make a smooth and easy transition to managing teleworkers. Performance standards for employees do not change whether they are on-site or off-site.

7. *Communication:* Establish effective communication methods for staying in touch with teleworkers and for enabling/encouraging them to stay in touch with coworkers and customers. Effective communication is key. Communication with a teleworker is typically a mix of face-to-face conversations, live phone calls, voicemail, email, and audio or web conferencing. Ensure your staff has access to agency-approved technology to facilitate and maintain effective and convenient communication among your teleworkers, their in-office peers and customers. Remember that no manager has total access to their staff all the time even if they all work in the office.

8. *Feedback loop:* Check in monthly or more frequently to discuss what works and what doesn't work. Consider asking your employee questions like:
    a. What's one thing you're excited about?
    b. What's one thing you are worried about?
    c. What's one thing I (supervisor) can do better to help you with your job?
    d. What's one thing you (employee) can do to improve at your job?

9. *Performance problems:* If your staff, either mobile or in-office, begins having performance problems, they need to be addressed. When an employee exhibits performance problems, it may not be caused by teleworking. Communicate clearly on unsatisfactory work results and develop methods, in concert with the employee, to meet performance expectations. It's important to clarify procedures for discussing performance problems upfront and for suspending or stopping teleworking.

Bottom line: communicate expectations, establish standards, review frequently and be equitable.

Attachment D: Employee Responsibilities

1. ***Clearly discuss what is expected of your employees in terms of work procedures***. As with any kind of work arrangement, ensure there is a mutual understanding of work assignments, expected products and required time frames. Although the supervisor is ultimately responsible for the functioning of the work group, the employee should keep their supervisor up to date on their schedule, making contact when mobile and the status of all pending work. Employees who would like to be mobile should be prepared to report to their supervisors on any projects, issues or successes.

2. ***Performance Management:*** Performance standards for employees do not change whether they are on-site or off-site.

3. ***Feedback loop:*** Feedback loops involve supervisors checking in monthly or more frequently with employees to discuss what works and what doesn't work. Consider asking your employee questions like:
   a. What's one thing you're excited about?
   b. What's one thing you are worried about?
   c. What's one thing I (supervisor) can do better to help you with your job?
   d. What's one thing you (employee) can do to improve at your job?

4. ***Establish good habits:*** Coach employees to consider using the following good working habits:
   a. Plan tasks at least a day ahead of time.
   b. Communicate regularly with supervisor and office staff.
   c. Stick to all deadlines.
   d. Maintain or increase performance level.
   e. Attend all department and group meetings.
   f. Keep supervisor informed of progress.
   g. If being mobile is not working out, talk to your supervisor.

Attachment E: Bi-weekly Performance Evaluation

Employee's Name: _____

	Yes or No	How? What technology was used?	Was it successful?
Is the employee contacting supervisor daily?			
Is the employee attending mandatory meetings?			
Is the employee attending huddles?			
Is the employee returning phone calls, emails and messages timely?			

Indicate your agreement with the following statements. (High levels of agreement indicate a successful teleworker.)

	Strongly Agree	Agree	Good	Disagree	Strongly Disagree
Employee requires little supervision.					
Employee is consistently meeting deadlines.					
Employee is successfully fulfilling job duties.					
Employee does not make work harder for coworkers.					
Employee is meeting customer's expectations.					

Rate the employee's performance in the following areas.

	Excellent	Very Good	Good	Meets Expectation	Needs Improvement
Productivity					
Interpersonal skills					
Dependability					
Communication skills					
Ability to work independently					
Overall performance					

Additional Comments: _____

_____

_____

_____

Employee Signature_____   Date_____

Supervisor Signature_____   Date_____

Attachment G: Individual Work Plan

Employee Name_____

Goal:				
Key Outcomes	Objective(s)	Action(s)/Deliverable(s)	Timeline(s)	Stakeholders

Attachment H: Performance Measurement Review Performance Measurement Review

Employee Name: _____

Date of Review Meeting: _____

<div style="border:1px solid black; padding:8px; display:inline-block;">

Score:_____ of _____

Percentage:_____%

</div>

Quality Measure	Points Possible	Points Scored
TOTAL:		

NOTES_____

_____

Note: For some items, "N/A" may be entered in lieu of a score. If this occurs, then the item's total possible score will be subtracted from the overall form's total possible score. This prevents the employee from being penalized for items that do not apply when the percentage rating is calculated.

Success!

Here are things you did well:

1. _____

_____

_____

2. _____

_____

_____

3. _____

_____

_____

Plan of Action

Here are opportunities for improvement:

1. _____

_____

_____

2. _____

_____

_____

3. _____

_____

_____

This review has been discussed with me.

_____   _____
Employee Signature   Manager Signature

Attachment I: Mobile Work Report/Email

Send the day before the mobile workday

Connie,

I will be in mobile work status tomorrow from 6:30 a.m. to 3 p.m. and in the office from 3 p.m. to 5 p.m.

Below are the items I plan to work on while in mobile work status and the means for accomplishing them:

- Read and respond to emails – smartphone
- Review RFP responses for Contract X proposal – took the binder home with me
- Assess applications for the Commerce Specialist 2 Recruitment in ASD – can open up NEOGOV on my smartphone/tablet
- 1:1 conference call with Amy – smartphone

Send at the end of the mobile work day

Connie,

I'm back in the office! Below is breakout of what I accomplished for the day. I'll be back in the office tomorrow.

Planned tasks accomplished

- Read and respond to emails
- Review RFP responses for Contract X
- 1:1 conference call with Amy
- Commerce Specialist 2 Application Assessment

Unplanned tasks accomplished

- Reviewed draft training for Supervisor Essentials (resulted from 1:1 with Amy)
- Drafted interview questions for the Commerce Specialist 2 (hiring manager wants to move faster than originally anticipated)

Planned tasks not accomplished

- Draft talking points for book discussion – bumped because of unplanned tasks priority. I will finish this on Friday.