

success formula 

Tools to build an
efficient, effective, and
engaged virtual team.



— THE —
CEO
PARTNER

Tools for Virtual Team Engagement

Below are 5 key areas you can implement & improve in create an efficient, effective, and engaged virtual team.

DOCUMENT PLAYBOOKS

- Create a list of tasks that your team will execute on.
- Use [Loom](#) to create a library of training videos
- Use [Rev.com](#) video transcribed to have written documents
- Review and update playbooks quarterly

By setting standards and defining repeatable playbooks, the team has generally less questions and gets a feeling for how long certain tasks should take.

CLEAR DELIVERABLES

- When does this tasks/project need to be completed?
- Who should be involved in the project?
- Have a central place for all tasks to be tracked and completed.

Establishing clear deliverables allows for no surprises. Using a Project Management tool will empower your team to stay on track of assignments. Look at [Asana](#) or [Tello](#) to get started.

CONSISTENT MEETINGS

- Morning Huddle (20 mins)
- Weekly all team meeting
- Monthly 1:1 Check-ins
- Quarterly Business Review

Meetings create an open communication flow. Virtual teams can require video for engagement.

COMMUNICATION CHANNELS

- Email
- Slack / Google Chat

Ensuring the team knows what channel to use and when is key for efficiency. (Ex. Email should not be used for task management).

REWARDS & RECOGNITION

- Acknowledge the success & wins of projects
- Paid virtual team lunch
- Finding recognize team members for their hardwork and commitments on a consistent basis.

Did you know that 69% of team members say that they would work harder if they felt their efforts were being better recognized by their CEO?