The Ultimate Guide to Virtual Leadership

How to Prepare Leaders to Succeed in a Virtual Workplace

Your Quick Reference Guide:

Leadership Required. Pants Optional.

We're living in a world now where leaders can spend all day deeply engaged in work. And they may never even put on pants.

Obviously, it's unthinkable in the buttoned-up office environment many of us were used to. But the COVID-19 pandemic caused the world to re-think our values in nearly every way. We've changed how we work, shop, educate our children, take vacations, and even celebrate milestones.

Embedded within this new way of life is how we connect and collaborate with one another. And that has huge implications for work and leadership.

For decades, we've had the technical capability to switch many businesses to a virtual workplace. But only a small percentage of businesses made the leap.

Why? In many ways, it was fear. Fear that managers couldn't tell if their employees were really working at home. Fear that they would lose control of the team. And perhaps most of all, fear over lost human connection with other people, and the power of spontaneous interactions.

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Your Quick Reference Guide:

But when the pandemic hit, hundreds of thousands of companies suddenly switched their workforce to virtual in a matter of days. And now? It's hard for many of those businesses to imagine ever going back to being in the office full time.

As businesses come out of survival-mode and move to a more virtual future, it's time to embrace a new style of leadership: Virtual leadership.

Of course, that's easier said than done. We know many companies are struggling with the transition.

This guide is designed to help learning and development professionals address this problem in two ways. First, we'll talk about the critical skills leaders need to excel as virtual leaders. And second, we'll show you how to develop leaders virtually. You can read through the guide end-to-end, or use the navigation bar on the left to jump to the sections most relevant to you.
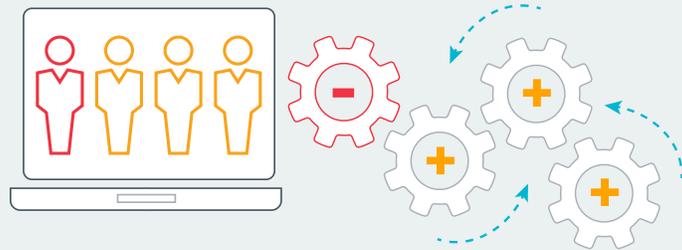
One in Four

In a DDI 2020 study of more than 15,000 leaders, respondents told us that their weakest skill by far is leading virtual teams. In fact, one in four leaders say they are not effective at leading virtually—double the rate of any other leadership skill.

While leadership in general packs a major challenge, it's clear that leaders are struggling extra hard to be effective without seeing their teams in person on a regular basis.

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Empathy Is the Heart of Virtual Leadership

After five decades of research and experience working with leaders, we have clear proof that demonstrating empathy and emotional intelligence is the number one most critical factor for successful leadership. These critical skills are closely aligned with higher engagement, lower turnover, and better productivity.

While these skills are essential for all leaders, they are even more pressing for those who lead virtual teams. Without seeing one another on a daily basis, it's easy for good leaders to lose connection with their teams.

Leaders may start to ignore the stresses their teams are facing, assuming that a lack of complaints means there are no issues. Or they may overlook good work, forgetting to give praise. In the worst cases, they may be simply absent leaders, who only connect with their teams when an issue comes up.

These pitfalls are easy to fall into, and the consequences can be hard to overcome. When leaders don't show empathy, their teams have no outlet for their emotions. That can lead them to become burned out, disengaged, and disconnected. As a result, performance tends to fall, and eventually, the leader faces turnover.
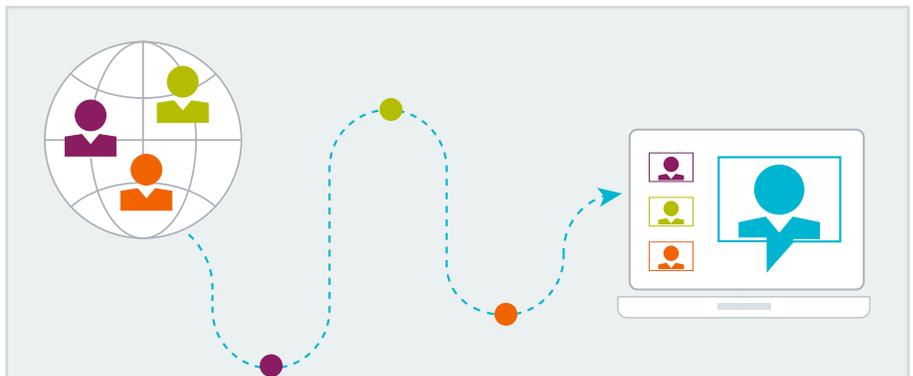
The Talent Advantage of Remote Work

Despite the challenges of shifting to remote work, there's a big advantage: You have access to a whole new talent pool. That means you aren't restricted by geography for hiring great talent, nor do you have to pay relocation costs.

And best of all? It opens up a whole new world for talent diversity.

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Work Life Meets Home Life

The switch to remote work has opened up employees' personal lives to their colleagues, whether or not they intended to. It's easy to catch a glimpse of someone's unique living room décor, hear a washing machine buzzing in the background, or see a crying child crawl into a parent's lap – and that's all in one conference call.

This new integration between home and work may leave many employees feeling vulnerable. They may struggle to separate who they are at work from who they are at home. As a result, they need understanding and empathy from their leader.

Employees need to know that they are being seen as a whole person, with both personal and practical needs. They need reassurance that their unique personality is accepted. And above all, leaders need to recognize that just as employees' personal lives are impeding on the workplace, so is the workplace impeding on their personal lives.

Remote work can cause many people to struggle to disconnect from work, leading to burnout and reduced work quality. Likewise, the integration between work and life can cause employees to question even more deeply how what they do at work fits into their personal beliefs and feeling of purpose. As a result, they need more support from their leaders to know that what they are doing matters, and fits in with a larger purpose.

The Stats on Work from Home

Working from home may mean that kids and pets make their way into meetings. But employees embrace and value the work-life balance.

80%
of employees said that when faced with similar employment offers, they would turn down the one that didn't offer flexible work.

85%
of employees confirm that productivity has increased in their business as a result of greater flexibility.

65%
of businesses say a flexible workplace reduces their capital and operating expenses, and helps them manage risk.

Source: International Workplace Group Annual Survey 2019

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3 Essential Skills for Virtual Leaders

Great leadership skills don't change whether you share a desk with your team or work on the other side of the world. But there are three skills that are particularly important when you're leading virtually.

1. Vision and Purpose

As a leader, communicating vision and purpose is always important. But in a close environment, a lot of that work often gets done in subtler ways.

It may be easier for employees to see how their work affects other members of the team. They may overhear conversations about what others are working on, showing the bigger picture. And it's easy to chat informally with teammates to talk through issues related to change.

With remote teams, it's easy for people to become disconnected from the vision and purpose. As the company goes through change, it can be hard to understand why changes are happening. Without co-workers around, it may feel like the changes are uniquely affecting them. And people may struggle to see how their own role has an impact in the new future.

It's up to leaders to translate company strategy into a vision and purpose for the team. They need to help their team find focus and clarity, and see how their work will contribute to the greater vision. And leaders need to work with their teams to come up with action plans to help them move forward.

When leaders are able to do this well, they can engage their team members not only practically, but emotionally. And that helps to ensure that the team is performing at their very best.

96%

Purpose Matters

People need to know what they are working for—and it's more than just a paycheck. According to DDI research, 96% of leaders say that purpose is critical to their job satisfaction. And it shows in business results, as the same study showed that purpose-driven companies outperform the market by 42%.

Source: DDI Global Leadership Forecast 2018

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2. Connection

When companies switch to remote work, one of the biggest losses is the human connection, with each other and their boss. In particular, they tend to lose those small moments of interaction, which can be crucial.

Even in a short conversation, a leader can set the tone toward a new strategic direction, give an update, or offer a quick moment of insight. But perhaps even more importantly, these small interactions are an opportunity for leaders to show empathy.

These moments create a chance for leaders to listen and respond authentically. People need to feel that their perspectives are heard and valued. They need to know they have been understood and respected. Leaders need to address these personal needs, in addition to their team's practical needs, to truly engage them.

Perhaps surprisingly, this is one of the areas where leaders struggle most. Over the past several years, the ability to show empathy and engage employees is consistently one of the lowest scoring areas across our leadership assessments.

And with a remote workforce, it's even harder for leaders to find these moments of connection. But it's critical that leaders know how to maintain this connection. These short interactions form the base of their relationship with their teams, and are a critical part of how people stay engaged, focused, and connected.

Feeling   **Fact**

The Empathy Formula
Showing empathy depends on acknowledging feelings based on facts.

Here's a formula you can use:
"It sounds like you're (feeling) because/about (fact)."

Here's how that might look in a real situation:
"It sounds like you're feeling overwhelmed (feeling) because of the reduced number of people on the team (fact)."

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3. Energy

While we all may admit that the physical workplace can be full of distractions, it also has a sense of energy. People are working side by side, collaborating both formally and informally.

That energy disappears at home. Suddenly, people have to become highly self-motivated, with less of the natural energy that occurs from being around their manager and peers.

On the flip slide, many employees may also be struggling to disconnect from work. With their laptop always nearby, they may feel like they need to be working all the time, especially as they struggle with uncertainty and job insecurity. As a result, they may be at risk of burnout.

So how do leaders generate the needed energy from a distance? It starts by showing empathy. As a researcher, Steven Covey once said, "When we show deep empathy toward others, their defensive energy goes down, and positive energy replaces it. That's when you can get more creative in problem solving and an ability to move forward."

Once people are heard and understood, leaders can start to build commitment. And a powerful part of that commitment depends on inclusion. Leaders need to ensure that every member of their team feels like they are part of the solution, and that they have a stake in the outcome.

In practice, that means that leaders need to ask for their team's help, and seek out their opinions. They need to encourage healthy debate, and provide positive feedback about differing opinions. By having the chance to offer their opinions and be part of solutions, people will be significantly more committed to the project.

By engaging and including their teams emotionally and gaining their commitment, leaders can help their teams maintain their energy to move forward. Furthermore, it helps to prevent burnout, as team members feel that they have contributed to and committed to the solution, rather than having it forced on them.
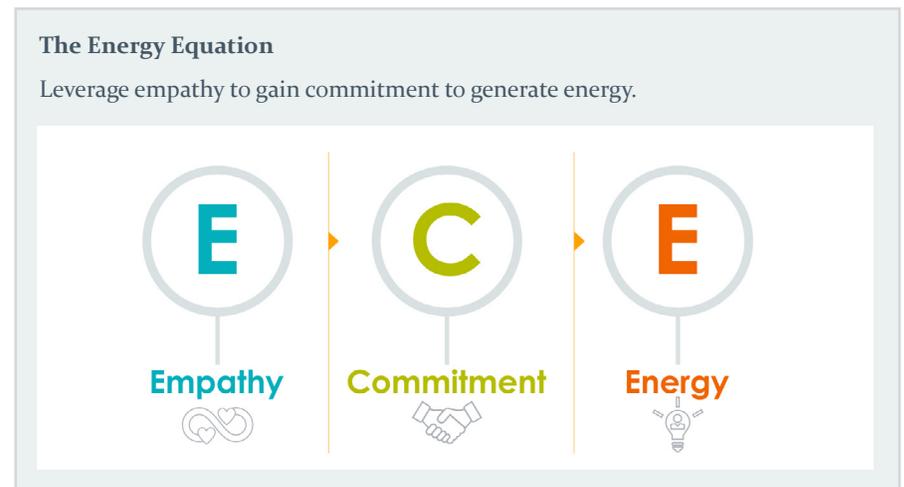
The Energy Equation

Leverage empathy to gain commitment to generate energy.

E — Empathy   →   C — Commitment   →   E — Energy

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Developing Leaders Virtually

Of course, building the skills leaders need to lead virtually is also a challenge when you have a remote workforce. Just as leaders are struggling to connect with their teams, you may be struggling to connect with and bring your leaders together for development.

Traditionally, many leadership development programs are done through in-person classroom training, often with digital learning happening in between classroom sessions. As remote work makes it harder to bring people together, there's a temptation to switch development entirely over to the digital world.

But that's a big mistake. Yes, there's a place and time for learning at your own pace. And it's tempting to take the easy route of giving leaders a library of courses to explore. But will your leaders have time to curate the right experience for themselves? And will they all get a consistent experience so they're in alignment with each other and with the business?

What leaders crave most is the connection with one another. It's in those moments of connection that learning is truly cemented, especially when it comes to leadership development.

One powerful option is the virtual classroom. It's certainly not new; at DDI, we've been doing virtual classroom for more than a decade. But it's a modality that's often been overlooked, as companies preferred in-person training to virtual experiences.
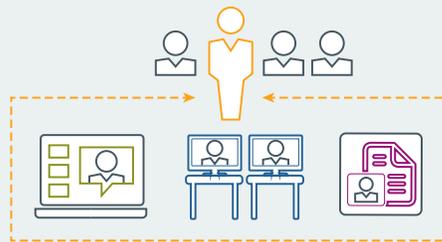
Can a virtual classroom be as effective as the traditional classroom? We'll let the stats speak for themselves on this one:

Employees see 90% mastery of skills from virtual classroom training.
Source: Training Magazine, "Virtual vs. Classroom Training," 2016

Companies that train their leaders using virtual classroom see 77% average increase in the quality of their leaders.
Source: DDI Impact Evaluation

Leaders rate virtual classroom sessions with 90% overall satisfaction ratings.
Source: DDI workshop evaluations from 7,080 leaders

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The Misunderstood Virtual Classroom

The virtual classroom is often misunderstood. In many cases, people confuse it with web-based training, which leaders complete at their own pace without any interaction with their peers. Or they think of it as the massive open online courses (MOOCs), which feature on-demand lectures. Or they simply think of the virtual classroom as a webinar.

But a well-done virtual classroom should be none of those things. A virtual classroom is a live, online learning experience, led by an instructor. It's synchronous, meaning that people participate in the experience together at the same time.

Most importantly, the virtual classroom is collaborative. There should be lots of activities and engagement with the instructor. Furthermore, learners should have a chance to break out into smaller groups to practice with each other.

In other words, it should have all the benefits of the regular classroom, including building connections between participants. It's just done on a virtual platform, like most meetings (and even happy hours!) are done with a remote workforce.

Virtual classrooms are a powerful supplement to other parts of a comprehensive learning journey. In the next sections, we'll cover more about how to make a virtual classroom a success. Or you can skip ahead to learn about how to build sample virtual learning journeys.
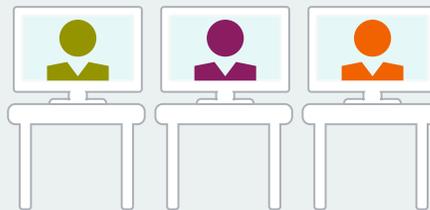
Virtual classroom isn't e-learning

"While e-learning is common in [our organization], I can tell you that the virtual classroom approach that we applied was viewed as especially exciting and interesting. It was really a great evolution of the traditional e-learning."

–HR Leader, Global Organization

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5 Elements for Virtual Classroom Success

There are five key elements to evaluate when you're considering how, when, and why to use the virtual classroom as part of a virtual learning journey.

To use virtual classroom training to develop the skills your leaders most need now, watch out for the following:

1. Suitability

Virtual classroom is a wonderful way to deliver training. But it's not always the right solution. For example, if the purpose of the training is to provide a large amount of complex information, providing this information in written form might be a better way to go.

It all comes down to what you are trying to accomplish. Therefore, before you move forward with a virtual classroom, you should ask yourself these questions:

- Do we have a good reason for using virtual classroom?
- Is interactivity involved, or could it be covered by an email or short document?
- What are the outcomes we are looking to achieve?

If, and only if, you can clearly answer these questions, will you be able to take the first step toward ensuring a successful virtual classroom experience.

2. Interactivity

The best thing about the virtual classroom is how it allows participants—regardless of their physical locations—to interact with one another. Given advances in technology, most virtual meeting platforms now have voice and video conferencing capabilities, as well as real-time chat. DDI's virtual classroom solution also includes on-screen annotation tools, polling questions, and virtual breakout rooms that accommodate small group discussion, brainstorming, and skill practice.

While this functionality is robust, you probably want to do a reality check to determine if this level of interactivity is a necessity for your learning design. If you don't need so much digital interactivity, then pause and ask yourself if you might be better off just preparing a webinar.

3. Variety

While a virtual classroom delivery can be interactive (see the point above), don't assume it's sufficient as a standalone modality. Remember, a virtual classroom is a substitute for a physical classroom; but it doesn't take the place of all the elements that define good training design. Pre-work, self-assessments, course journals, job aids, follow-up activities, and other materials can increase the course's impact. What the right mix will be for any course goes back to the course's purpose and objectives.

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4. Minimal technical glitches

While the content and delivery design will go a long way toward determining a successful virtual classroom experience, the technology matters a great deal, too. That means the capability of the virtual classroom platform you are using, but it also means the ability to properly use the technology and to avoid preventable technical mishaps.

The best way to avoid this? Based on our experience, we suggest having a producer for every course who can drive the platform and support learners with any technical concerns. Doing this frees up the facilitator to focus on the transfer of learning.

5. A skilled facilitator

As mentioned above, a course delivered via virtual classroom can be just as effective as one in a physical classroom. But while the learning can be the same for participants, a virtual classroom course represents a different experience for facilitators. That's because it presents a different set of challenges. The technology is part of it, but just as important is the absence of real-time feedback. The body language and facial cues that help a facilitator track the level of participant engagement and understanding are either harder to detect or, if video isn't being used, absent entirely.

See the next section for more tips on how to successfully facilitate in a virtual classroom. Or skip ahead to see virtual learning journeys.

If doctors can do it, we can too

Like many other industries, healthcare has long been reluctant to embrace technology to replace in-person visits. While the technology to perform telemedicine has been available for a long time, people preferred the traditional approach.

For example, a BBC analysis of Britain's National Health Service showed that only one percent of appointments to primary care doctors were done via video in 2019. Now, 100 percent of patients have a telehealth visit first, and only seven percent end up needing an in-person visit.

It's a great lesson for the learning industry. While in-person aspects of leadership development may never go away entirely, much more can be done virtually (and effectively) than we ever imagined before.

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How to Boost Virtual Facilitation Skills

For many learning and development professionals, being a great classroom facilitator has long been in their skill sets. But the reality is that the virtual classroom requires an adjustment to your approach. Here are a dozen of our most popular tips for success in virtual facilitation.

1. **Plan for contingencies.** We never like to think about what may go wrong during a delivery, but it's important for virtual deliveries to have a plan. What happens if your internet goes down, or you lose your phone connection? What if there's a bandwidth issue and you can't use video? Have a contingency plan in place so you can execute immediately and minimize the impact for the learners. Hopefully you will never need to use it!

2. **Prepare for the session.** Ensure you have all your materials required for the session. Before the session, plan out the timing of the session content as a guide and identify where you can adjust should time become an issue. Don't wait until you are leading the session to think of how you can make adjustments.

3. **Use your voice as a key tool for success.** You may or may not be using web cams in the session. Either way, your voice is a key tool for engaging participants and clearly conveying information. Make sure you pace yourself appropriately, and you speak clearly. Even more importantly, make sure you have a warm, conversational tone to engage participants.

4. **Set the stage for a safe learning environment.** For many participants, this will be a new environment. Welcome participants as they log into the session, and engage them immediately in some type of chat to make them feel at ease. These first few moments will give them a sense of what the session will be like and who you are as a facilitator.

5. **Use people's names.** Throughout the session, create a strong sense of connection with participants by always using their names. Whether asking questions, responding to comments, or in the chat box, people appreciate being addressed personally. It helps to bridge the digital gap.

6. **Respond to learners' tech needs.** For most people, it's not enough to give instructions just one time around the buttons and tools in whatever platform you're using, so be sure to coach people around the use of tools throughout the session. People appreciate the small nudges about where things are located. And be sure to allow for longer response times to questions and activity debriefs as learners continue to navigate these tools for interaction.

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7. **Read your learners and adjust.** Virtual facilitation depends on flexibility, and you need to be prepared to change your approach. You may have a group that is quiet and reluctant to speak up. If so, you can switch to chat for some of the time or have them type responses on the slides. Or you may have a group that loves to talk, but it's causing issues with covering the content in a timely manner. In that case, switch to the chat tool for some of the time. Read your participants and adjust accordingly.

8. **Encourage participant involvement.** Make sure you get participants involved right from the start of the sessions. Ask questions when they log in, such as "How are you today? Where are you calling in from?" During the session ask them to share their experience or insights. Ask where they see potential challenges and benefits. Ask them and ask them often to ensure a high level of involvement!

9. **Listen and respond with empathy, and build self-esteem.** It may seem obvious, but it's a key virtual facilitation skill that's often overlooked: Listen to participants with empathy. It's easy for them to get frustrated with unfamiliar technology. And it may feel like a hit to their self-esteem if they struggle. Watch for comments in the chat or verbal comments expressing feelings. If you see someone who needs help, demonstrate empathy. Recognize that this may be a new environment. Provide ongoing coaching, guidance, and assurance of their ability. Reassure them that you will navigate the session together, and have fun doing so.

10. **Use examples and analogies.** Storytelling is a powerful tool to illustrate concepts in the classroom, but the lack of non-verbal communication can make it tough to do successfully in a virtual environment. Instead, ensure you have succinct examples and analogies ready that you can use to illustrate the content. These shorter examples come across more effectively in the virtual classroom.

11. **Check in often.** When transitioning from one topic to another, do a quick check in with learners to ensure they have understood the content and are good to move forward. You can do this with feedback tools, a smiley face, or a thumbs up. If you see someone isn't responding to questions or participating in activities, send a quick private chat to ensure everything is okay. You can also use the feedback tools to gauge how the group is feeling overall. For example, "Give me a green check mark if all is okay or a red X if you have a question." This way, you get a response from all participants and can re-engage them quickly.

12. **Have fun.** As facilitators, we like to have fun in the traditional classrooms. The virtual classroom is no different. Don't hesitate to joke, or use fun activities the same way you would if you were together in person.

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Building Virtual Learning Journeys

The most important thing in this guide is how all the pieces come together. How do you develop your leaders virtually to get the skills they need?

In this section, we offer several sample learning journeys, designed to address some key issues you may be facing. We designed each learning journey to deliver the right blend of personalized learning with group connection. Each journey has three parts:

Build with Courses: Whether you choose virtual classrooms or web-based training, we suggest that you build the content around key courses that help people understand complex topics and practice new skills.

Boost with Microcourses: Deepen learners' knowledge with short, focused digital courses that dive into related topics.

Sustain with On-Demand Tools: Tools such as games, chatbots, self-assessments, and discussion planners help leaders to sustain learning.

Each of these journeys can be offered entirely virtually. And of course, we'd be happy to talk about how you could customize the approach for your company.

Leadership Essentials for a New Reality

As you reset your business plans or transition into a new world of work, it will be up to your leaders to define what's next and start building for long-term success. Build the essential skills for leaders to create purpose, connection, and energy to move forward.

BUILD
Skills with Courses

OR

Web-based Training   Virtual Classroom

- Communication: Connect Through Conversation
- Building and Sustaining Trust

BOOST
with Microcourses

Microcourses

- Handling Emotion and Upset
- Authenticity and Transparency
- Everyday Engagers
- Influencing Others to Make Things Happen

SUSTAIN
with On-Demand Tools

Development Tools

- How Inclusive Are You?
- Plan Meetings that Matter
- Focus on Others: Your Emotional Intelligence Tendencies
- Is Empathy Boss? Game

Leading Virtually

If your teams have recently switched to remote work, this program helps leaders find ways to communicate and connect with their team virtually.

BUILD
Skills with Courses

Virtual Classroom

- Communication: Connect Through Conversation
- Leading Virtually

BOOST
with Microcourses

Microcourses

- Leading Virtual Meetings
- Communicating Virtually
- Building Interview Rapport Virtually

SUSTAIN
with On-Demand Tools

Development Tools

- Chatbot Practice
- Conversation Planner
- Focus on Others Insight Tool
- Communication Job Aid
- Leading Virtually Knowledge Check
- Virtual Meeting Tips

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Lead Through Change and Disruption

Many businesses who have switched to the virtual workplace are also trying to pivot their business in many other ways. During these times, it's critical that leaders make high-quality decisions and communicate those decisions appropriately and with empathy. This program will help your leaders navigate through change and prepare for tough conversations and decisions, while continuing to involve others.

BUILD
Skills with Courses

Web-based Training OR Virtual Classroom

- Communication: Connect Through Conversation
- Driving Change
- Making High-Quality Decisions

BOOST
with Microcourses

Microcourses

- Boost Your Resilience
- Handling Emotion and Upset
- Finding Control During Change

SUSTAIN
with On-Demand Tools

Development Tools

- Conversation Planner
- Focus on Others Insight Tool
- Change Challenge
- Change Knowledge Check
- Decision Making Planner
- Culture and Decision-Making Interview

Boost Engagement and Retention

It's common that leaders may struggle with engagement and retention of virtual teams, especially if the company is changing rapidly at the same time. Engagement is important to stay focused, especially as leaders need to maintain team morale and energy virtually. This program will help leaders connect with what matters most to their teams, build and sustain trust, and promote inclusion.

BUILD
Skills with Courses

Web-based Training OR Virtual Classroom

- Communication: Connect Through Conversation
- Engaging and Retaining Talent
- Creating an Inclusive Environment

BOOST
with Microcourses

Microcourses

- Ensuring Team Avoids Burnout
- Everyday Engagers
- Communicating Virtually

SUSTAIN
with On-Demand Tools

Development Tools

- Focus on Others Insight Tool
- Communication Job Aid
- Knowledge Check
- Reactive Retention Discussion
- About Those Stereotypes Activity
- How Inclusive Are You? Activity

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Create a Coaching Culture

Often one of the most challenging parts of virtual leadership is helping others perform at their best, whether learning new skills or improving their approach to a project. This program will help you build a coaching culture, so that people can get coaching not only from their manager, but their peers and other colleagues. This learning journey focuses on building essential skills of seeking and listening, giving feedback, and coaching.

BUILD
Skills with Courses

Web-based Training **OR** Virtual Classroom

- Communication: Connect Through Conversation
- Coaching: Move People Forward
- High-Impact Feedback & Listening

BOOST
with Microcourses

Microcourses

- The Power of Seeking
- Creating a Coaching Culture for Your Team
- Addressing Poor Work Habits
- Discover Your Unique Coach Qualities

SUSTAIN
with On-Demand Tools

Development Tools

- Conversation Planner
- Communication Job Aid
- Chatbot Practice
- Coaching by Asking Activity
- Coaching Mindset Insight Tool
- Seeking Feedback Activity
- STAR Feedback Form

Create an Inclusive Environment

It's easy for employees to feel isolated when they're working from home, especially if they don't feel like they're part of the "in-group" at work. This program helps leaders build the foundational skills they need to set the tone for inclusion, and engage their teams fully for better results and better innovation.

BUILD
Skills with Courses

Web-based Training **OR** Virtual Classroom

- Creating an Inclusive Environment
- Fostering Innovation
- Inclusion: Build Empathy

BOOST
with Microcourses

Microcourses

- Unconscious Bias
- Leveraging Diversity
- Creating a Coaching Culture on Your Team

SUSTAIN
with On-Demand Tools

Development Tools

- Quick to Judge Continuum
- About Those Stereotypes Exercise
- Capability and Motivation Grid
- Is Empathy Boss? Game
- Manager Support Resources

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Your Quick Reference Guide:

Ready to Get Started with Virtual Leadership?

The world of virtual work is here to stay. The only question is whether your leaders are ready to excel in this new environment. If not, you run the risk of low productivity, low engagement, and low retention.

The time is now to start shifting your culture to not just survive, but thrive in the virtual work environment. There doesn't have to be a trade-off between the flexibility of working from home and having a thriving work culture. If you can equip your leaders to do this well, you will see your business quickly pivot to a new frontier. And you'll see the talent shine both in the people you have today, and in the employees you'll be able to attract in the future.

At DDI, we're ready to work by your side to build better (virtual) leaders for a better future.