Pivoting Your Team to a Virtual Environment

Michelle A. Turman, MA, CFRE
Who, What, Where and our Why

- Executive Searches (Interim Services), Organizational Management, Fund Raising, and Virtual Training
- Support Services in the areas of Executive Coaching, Marketing and Advertising, Grant Writing, Database Administration, Background Checks and Drug Screening, and Virtual Events.
- Over $75 million raised since 2014
- Over 75 nonprofit organizations “changed”
- Over 400 volunteer hours donated
- Over $40,000 in corporate support back into the community
Learning Objectives

By the end of this session, participants will be able to:

- Better define potential work systems to successfully manage a virtual teams.
- Establish how you will effectively communicate to ensure mission fulfillment.
- Assemble the components needed to create a culture of efficiency, productivity, and success that includes remote employees.
How has the pandemic affected your nonprofit?

- Significant changes in demand
- Reduced Govt., Private, and Earned Funding
- Challenges with Staff and Volunteer Availability
- Unable to provide essential services
- Destabilizing Conditions
- Cancelled revenue-generating programming

1/3 NPOs had less than one (1) month of cash before the crisis and we're already a month into this

2/3 of NPOs indicated they were facing crisis just weeks into this
Define Your Work System

Invest in the right tools and software for your virtual team:

1. **Instant Messenger**: Skype or Slack can help promote a sense of community and team building and gives teammates a quick informal way to communicate.

2. **Screen Capture**: Capture Tools like TechSmith or Evernote Web Clipper enable you to share what you’re looking at when someone can’t look over your desk or computer screen.

3. **Cloud file sharing**: Dropbox or Google Drive gives access to documents and files, anytime and anywhere. Larger organizations may use a specific platform developed specifically for use. Adaptive Planning provides accounting and management of donors, special events, social media and volunteers.

4. **Collaboration Software**: Asana or ClickUp facilitate task planning and execution.

5. **Training Platforms**: Go To Meeting/Webinar, Microsoft Teams, or Webex provide a more secure environment.

6. **Visual Workflows**: Gantt charts or Kanban Boards can align the workflow visually for teams.
Establish How You Will Communicate

Internal Audiences: Board & Staff
- Focus everyone on the priorities and guidelines on frequency
- Transform culture and practice
- Increases confidence in management
- Appropriate uses for informal communications: Instant Messenger, Virtual Conferencing
- Appropriate use for formal communications: Email, Phone, Virtual Conferencing

External Audiences: Funders and Partners
- Demonstrates need and context
- Supports reporting and compliance
- Increases confidence in management
- Appropriate uses: Phone, Mail, Email (if preferred), and Virtual Conferencing
Creating the Culture

• Build trust by clearly communicating desired outcomes or deliverables, identification of a champion, the timeframe for completion, and provide the necessary resources
• Boost productivity through project time tracking
• Update position descriptions
• Invest in skills, abilities or knowledge
Incremental Changes

20th century

**Structure:** Bureaucratic, multi-leveled and managed by senior level

**Systems:** Distribute performance data to Exec. level only, offer training and support to senior level only, depend on few performance information systems

**Culture:** Inwardly focused, centralized, slow to make decisions, political and risk adverse

21st century

**Structure:** Fewer rules, limited levels of management and lower level employees will manage

**Systems:** Distribute data widely, offer training and support to many people, depends on performance information systems

**Culture:** Externally focused, empowering, quick to make decisions, open and candid, more risk tolerant

© 2020 Catalyst Consulting Services
Questions?

Michelle A. Turman, MA, CFRE
CEO
813-839-2282

mturman@catalystcs.org
www.catalystcs.org