team, I headed out there. What I learned was that I was doing some things right (yay!) and some things wrong (also yay! It means an opportunity to learn).

Stacy Kildal • May. 07, 2014

A few weeks ago, I flew out to San Francisco for a one-day conference targeting small businesses that work with distributed teams. Since I happen to have just such a team, I headed out there. What I learned was that I was doing some things right (yay!) and some things wrong (also yay! It means an opportunity to learn).

OfficeOptional was a conference put on by the Lean Startup team. It was very fast paced, some of the material overlapped, but all in all it was worth it to see the different variations on a theme.

What I learned that I was doing right:

- **Using chat to stay connected with my team** – We use chat rather than email often for quick questions, updates... or ranting. I can keep the history and scroll back and forth later to reference something if I need to. Right now, Google chat/hangouts are working just fine to accomplish this.

- **Making sure to always include time zone when scheduling meetings** – this seems simple, but I was surprised to see and hear how many people were talking about this after. Sometimes we don't realize that the other person may be traveling (or I might be!), or just happens to be in a different time zone. Not only do I always include it in emails, but I always make sure I edit any calendar invitations to include it as well.

- **Using simple tools is fine** – This was my biggest take away. One thing I've been struggling with is to find a great tool to track our new client prospects. I love MethodIntegration.com, but honestly, it's more than we need right now. I've put a

lot of pressure to find something that does what I want, and it easy for my team to

regardless of whether it's a quick phone call each morning, or something simple like a google form we each complete every day. (I'm thinking that because it would show date/time stamps). We'll each answer 2 questions: What did you accomplish yesterday and what are you doing today? Either way will give all of us the option to follow up with each other on something if needed.

- **Not using chat often enough** – we use this intermittently (for instance, I generally only sign on the Google chat when I remember or need to send a message), but one of the speakers mentioned that his team uses this as way to let everyone know that they've arrived "in the office". I love this idea. If we're logged in, the others know we're available.

- **Possibly relying on email too much** – This is one that *maybe* I sort of disagree with. I've been so much lately about how "everyone" hates email, that "email is dead". I disagree because sometimes it's really the best way to communicate something, especially when dealing with clients. think internally we can find more effective ways to communicate – that's where the chat will come in. I understand that we can't use it to collaborate on projects, too much stuff can get lost in complex email threads, but we have a project management tool for those. I also hear: "Don't use your email as a To-Do list" quite often lately. While I don't technically do that, I have a separate tool, called a notebook and pen*, I DO leave emails in my inbox until I'm finished with whatever related task or issue is associated with them.

After this event, the CRM stress is gone, I'll find one when I find one, and continue to use the lead tracking spreadsheet that we have in place. Because my team is contractors, they're not just working for me – they have other clients to attend, and it's not feasible for them (or me) to always be logged into a group chat if they're working, so for now we'll use it as needed. Both of these will need to be addressed as we grow, so their still a need, just not as much as I originally thought. The immediate

need, I realize, is status checks. I think this is an integral part of any a company – that

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