Efficient E-missions

A BRIEF OPERATIONAL FRAMEWORK TO STRUCTURE REMOTE MISSIONS

Disaster Risk Financing & Insurance Program

SUPPORTED BY WORLD BANK GROUP

COVID-19 has pushed us into an unprecedented era of work from home and virtual missions. While we continue adjusting to the new normal, we must find a way to replicate the intangible connections and strong relationships we build with clients during our in-person missions in order to seamlessly adapt our operational work.

This guide outlines a brief framework to help task team leaders (TTLs) across the World Bank Group navigate virtual missions effectively. Done right, virtual missions cannot only help ensure productivity but also boost morale while we adjust to this new situation.

A BRIEF OPERATIONAL FRAMEWORK TO STRUCTURE REMOTE MISSIONS

30%

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Step 01: Design an Effective Virtual Mission Structure

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EFFICIENT E-MISSIONS

With everyone working virtually—physically isolated, outside of their usual office space, and across multiple time zones—setting a clear structure and work plan for the mission ahead of time can avoid confusion and provide clarity to all team members.

1.1. Create a virtual mission toolkit.

Ahead of the mission, a clear structure should be established to ensure that all information about the mission is accessible in one central location rather than across multiple emails. This toolkit should be stored in a common location (such as a One Drive folder with editing access for all team members) and should at a minimum include the following:

Statement of Mission Objectives (SMO) package:

- The SMO, with clearly outlined responsibilities and goals for each person on the mission team.
- Clear guidelines for decision-making (specifying who makes what decisions, and who takes the final call).
- Clear guidelines for communication (specifying who does and does not communicate with clients, what standard template should be used for email, who has clearance on discussing confidential information).
- Designation of the responsible focal point for each activity, with the TTL responsible for overall progress and with all directions and tasks clearly explained and easily implemented.

Mission communications protocol:

- A shared file with essential contact information for each member of the virtual mission team (VMT), including current time zone, phone numbers, email address, and preferred ways of communication.
- Link to a chat group (e.g., MS Teams, WhatsApp) to help with real-time coordination of all team members and to ensure nobody feels left out of one-to-one conversations

Virtual mission team meeting schedule:

A shared file with the mission schedule that clearly indicates the time zone it is based on. Responsibility for keeping the schedule up to date (including which VMT members are expected to join meetings as well as connection details) should also be clearly indicated. All team members should have access to the latest shared schedule, and any updates should be reflected in real time on the schedule.

1.2. Schedule daily mandatory meetings.

Meeting regularly to debrief helps everyone on the virtual team stay on the same page and avoid duplication of effort. If possible, a daily mandatory 30-to 60-minute meeting should be held at either the beginning or the end of each day to wrap up the day's work, clarify follow-on activities, and plan for the next day. These meetings should be mandatory for all core mission members, with calendar time blocked in advance.

1.3. Schedule virtual office hours.

VMT members should stay logged in online for a specified time period and work on their individual projects while taking necessary breaks. This arrangement keeps team members in the same virtual space so they can easily contact one another with a question or request.

1.4. Establish a virtual control room (on MS Teams).

Each mission should establish a virtual control room at the beginning of the mission. This could be a dedicated MS Teams channel with a supporting repository of all documents (linking the toolkit mentioned above). Staff on standby and niche technical experts should be included in this control room from the beginning (on-call), so they can be brought in rapidly as required to support the main mission team.

Some tasks the virtual control room can perform:

- Post/communicate the daily mission agenda (set by the TTL) and provide key takeaways and recap at the end of each mission day.
- Source/set up the logistics for niche technical support and expert consultants for short meetings during the mission.
- Design interactive experiences like online polls and activities within meetings to help the VMT members engage with clients on a more personal level within the virtual setting and thus build stronger relationships.
- Ensure that VMT members in a different time zone are rapidly brought up to date on the day's work.

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Step 02: Set a Remote Work-Flow Culture

LEVEL

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2.1. Establish rules of engagement.

To help clarify expectations and make collaboration seamless, clear rules should be in place for when, how often, and with what technology team members will communicate.

For Example:

- All team members should provide a written account of their expected schedule, including constraints, as part of the virtual mission toolkit (step 1). For example: "I am offline 6–7:30p.m. for kids' dinner but I will work again after 8p.m. and can stay up late for emergencies."
- MS Teams can be used for daily check-in meetings, but Jabber or another chat program should be used when communication is ongoing, and chat messages should be used for immediate coordination and urgent tasks (those to be completed within three hours).
- The channel for VMT members to coordinate during the meeting (e.g., what chat platform or app, what chat group) should be clear before the meeting.
- Each day, time should be set aside on an ad-hoc basis (e.g.,30-minute slots in the morning and afternoon, or one hour in the middle of the day) to resolve unforeseen issues.
- When possible, and to the extent appropriate, communications between team members should be kept on the same platform. MS Teams allows this feature, which integrates file sharing and chat.
- There should be opportunities for winding down within the team. The easiest way to do this is to leave 5–10 minutes for non work conversations at the end of each meeting. While this may seem forced and artificial at times, it can break down barriers and reduce feelings of isolation.

2.2 Break jobs down.

- Clearly breaking jobs down into smaller tasks from the beginning will clarify expectations, reduce demand on senior staff time, allow junior staff to take on more responsibilities, and effectively leverage consultants while still making them feel part of the full team.
- Letting junior staff manage the agenda when possible could provide a learning opportunity for interested staff and relieve TTLs of some responsibility.
- While good practice is for the TTL to open and close every meeting, it can be helpful to have a time-keeper/facilitator for important meetings to help keep the meeting on track (time and agenda), provide links/background information on the meeting channel/chat, and provide written key takeaways at the end of each meeting.

2.3. Run effective online mission meetings.

Effective time management shows clients that their virtual time is just as valuable as their in-person time. Meetings should be run as they would be in person, with clear objectives for the client and the mission team and adherence to timelines.

A checklist to run effective online meetings:

1. Keep length short.

Cap each meeting at 90 minutes or less. If you need a longer meeting, set a15-minute buffer between each 90-minute block to allow participants to decompress, digest information, or just get up, walk around, and get rid of online fatigue.

2. Be clear about design.

Ensure each meeting has a clear agenda and that timing and responsibilities are likewise clear.
Each speaker can typically hold audience attention for 12 minutes without visual aids and 20 minutes with visual aids like slides and graphs. Keep sufficient time in the meeting's total duration for other business or Q&A. If the meeting is intended to be a discussion, please prepare and share discussion questions with the VMT at least 24 hours in advance of the meeting (when possible). Remember, seamless conversation is easier in person, so extra steps are needed to optimize collaboration.

3. Use video.

Whenever possible, use video to personalize the interaction and keep participants engaged. However, as a courtesy to clients in developing countries, always provide a dial-in option in case the internet bandwidth is not suitable for video conferencing.
The mission team should be available on video during interactions with clients, since seeing faces and expressions is similar to an in-person experience and allows for some of the intimacy of an in-person meeting. When possible, keep your video background a neutral solid color. Always test your video before joining a meeting to ensure that the angle and lighting allow for a clear image.

4. Test the technology.

Have the administrative focal point for the mission login five minutes early to ensure that the technology has been tested and is usable. As part of meeting calendar invitations, make sure to send technology guides and contact information for relevant people to both the mission team and the clients.

5. Assign a facilitator.

All meetings with more than five people will benefit from a facilitator who is responsible for keeping track of time, outcomes, interventions, etc. Do not forget introductions so that clients know everyone participating in the call.
If appropriate, integrate a short icebreaker to introduce all participants and reinforce personal relationships.
The TTL can often serve as the facilitator.

6. Announce if you plan to record the meeting.

Let clients know at the beginning if the meeting will be recorded and make sure everyone is comfortable with that plan.

7. Capture real-time feedback.

It can be challenging to gather and process high-quality input during a virtual meeting. In larger group meetings (and as appropriate), use polls, ask open-ended questions, or solicit inputs through a chat box to get real-time input. Online collaborative tools like whiteboards can be used, but there must be a separate person dedicated to real-time note taking.

8. Take security seriously.

Technology comes with its own security concerns and challenges. Ensure that your team has a set of safe practices to follow before every client meeting, and that team members follow World Bank Group guidelines on data confidentially and access.

9. Reflect on your meetings.

Take time for a quick feedback session after your meetings to take stock of what worked well and what might be improved. If your relationship with the clients is long-standing, it could be appropriate to collect feedback from counterparts as well.

10. Exchange ideas and change it up.

As we migrate toward more virtual missions, it is important that we identify best practices and set up mechanisms to rapidly share them and other key ideas across the team, unit, and organization. Not all meetings need to be the same format: some can be formal negotiations, some short sprints, some collaborative discussions, and some webinars. Not all ideas and frameworks will be effective in every situation, but to improve we must be willing to test, reflect, learn, and share.

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Step 03: Ensure Follow-Up and Follow-Through

LEVEL

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The virtual mission does not end when the last meeting is over. All required work for wrap-up and follow-through-by the clients, the country team, the mission team, and management-must be completed. This process should also entail reflecting on ways to continue relationship building, learning, and information flow, thereby strengthening your operational work.

3.1. Post-mission wrap-up.

After the mission, ensure that all the information from the mission is in the same accessible location as the virtual mission toolkit. The post-mission wrap-up kit should at the minimum consist of the following:

- Aide-mémoire or back-to-office report for the mission summarizing key outcomes and next steps
- Wrap-up email with unanswered questions/issues raised during the mission, additional reading/research material, etc.
- Wrap-up meeting with the mission team to close out any pending questions, ensure clarity on next steps, and provide a feeling of success and closure to all mission members. Everyone’s contribution to the virtual mission should be acknowledged.

3.2. Lead to energize.

As a virtual mission TTL, your leadership should energize the team and bring it together. Since the whole mission team is working remotely, it is essential to set up clear directions and procedures and to communicate them effectively. This means clearly outlining the use of digital tools, individual roles and responsibilities, timelines etc.

Virtual leadership framework:

Outcome driven.

It is useful to break down the mission's goal/outcome into individual daily outcomes and if possible further into meeting-based goals. Best practice is for 90-minute meetings to have a maximum of three overarching goal; VMTs can have up to five overarching daily goals. Some organizations have started using the SCRUM method to break down their outcomes and discuss progress.

Routine based.

It is important to have a planning meeting with your team to formulate how you will work together on the virtual mission. This discussion should cover the team's daily plan, note individual constraints, and ensure that everyone commits to participate in specific key meetings.

Flexible and empathetic.

Find a way to connect with team members and build a sense of inclusiveness and community. Be flexible and understanding of personal constraints and ensure that all voices are heard. Be proactive in staying in touch with the team and create channels for "escalation" and personal communication to ensure that everyone can effectively reach out-and be reached-when necessary.

Disclaimer: This document aims to guide staff to further refine and improve the efficiency of their virtual missions. It does not offer a one-size-fits-all approach; nor do all the outlined steps need to be followed in sequence. Please use the guide based on the work culture of your individual teams. If you have ideas, tips, or suggestions, we would love to hear from you. Please contact: Kaavya Ashok Krishna (kashokkrishna@worldbank.org)

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For more information contact:

Kaavya Ashok Krishna
kashokkrishna@worldbank.org

Penny Li
pli2@worldbank.org

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