Long Distance Relationship

How to Work with Clients You've Never Met Face-to-Face

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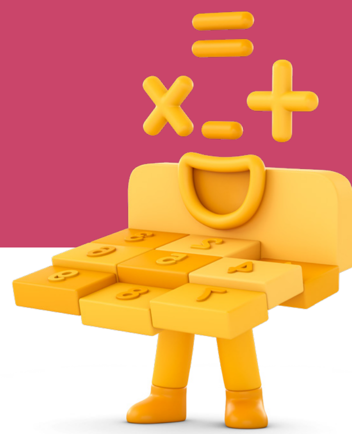
CHAPTER 1

What You Should Know Before Working With Remote Clients



Once you set your sights on having remote clients, the possibilities feel endless. Clients all across the world – sure, why not? Unlimited growth and revenue – it could happen! Huge time and money savings on commuting and travel costs – bring it on.

Remote work has been associated with less turnover, fewer office costs, and an overall sense of employee wellbeing. Why wouldn't you want that scenario for yourself, your employees, and your clients?

But being good at what you do is simply not enough to land and manage remote clients. If you think the remote client relationship is the same as an in-person client relationship, you're in for an unpleasant surprise.

It's difficult to build a trusting relationship with an in-person client. It's even harder when they rarely, if ever, see you face-to-face. You need to make sure you have the infrastructure in place to maintain this relationship, long before your first remote project kicks off.

You need to go beyond just doing the work. It's important to consider a range of factors: onboarding, budgeting, long-term goal setting, communication, and problem-solving.

Toggl runs as a 100% remote team. We've grown from 2 founders to more than 80 people across 25 countries. Over the years, we've gotten a lot of questions about how we manage, so we will go into that in this book.

We know that whether you're a one-person business or a global entity, landing and managing client relationships is always a priority. How exactly can you position yourself to find the best clients for your remote operation. How will you seamlessly incorporate them into your project lifecycle?

Setting Up Your Remote Client Infrastructure

Let's back up for a moment. When you're thinking about finding and managing remote clients, consider your overall project lifecycle. You'll need to need to make sure that you establish clear processes in each of the following areas:

Kick-Off

Say a client happens upon your website, and now they want to work with you. How will you professionally kick off the project, given that you probably won't be meeting in-person? Once contracts are signed, you should know exactly where you're going, and communicate it to the client.

Expectations

If your client is expecting you to check in daily but you plan to communicate weekly, there's a disconnect. You'll need to understand how and when your client expects you to be online. When can your client reasonably expect you to deliver on your agreement? How often should you be checking in? Expectations are extremely important to stake out around kick-off time because sometimes, when you're remote, expectations are all that you have. Although expectations evolve over time, make sure to give plenty of space and time for mapping these out from the get-go.

Access

What do you consider truly "internal"? Whether it's a private Google Drive, Slack channel, or folders of logos and design assets, you need to delineate access between internal and external stakeholders. Do you operate on full transparency, where you'd like your client to see everything? Or do you have a space for experimenting and rough drafts that is off-limits to clients?

Security

When you're working online, there are safety concerns. Who handles passwords? Do both yourself and your client have 2-factor authentication? What sensitive information should you be aware of?

Mission and Values

Although these lofty words often find their way into buzzword-filled company manifestos, it is important to consider your team's mission and values, and compare them with clients. If you have a quirky, edgy brand but your client is a no-nonsense financial services company, make sure you anticipate areas where your styles might clash. You might solve potential issues with a simple fix, like developing branding and tone-of-voice guidelines to ensure that prospective clients understand who they're hiring.

KPIs

You need to understand what success looks like. What are you measuring so that you can determine whether your efforts are working? You should have a plan for establishing the KPIs that are important to your client, and also for weighing in on which KPIs you think are important.

Leadership and Reporting

You should have a point-of-contact who is responsive to your client. You should also have a clear hierarchy. What you're doing internally will look very different to the finished product you're presenting to your client. What does the reporting process look like on your side, and what does it look like on theirs? If they have a formal structure, and expect to communicate only with executives, it's important to understand that early on.

Communication Channels

Where do your client's communications live, and can you meet them where they are? If you're a die-hard Slack team but your client prefers e-mail, who will adopt to what? You should denote the communication channels and frequency of communication in advance. With remote clients, you should tend to over-communicate to make up for the face-time that you're missing. A quick update at the end of each week or a Google Doc that you update each week with accomplishments and blockers can go a very long way.

Project Management Tools

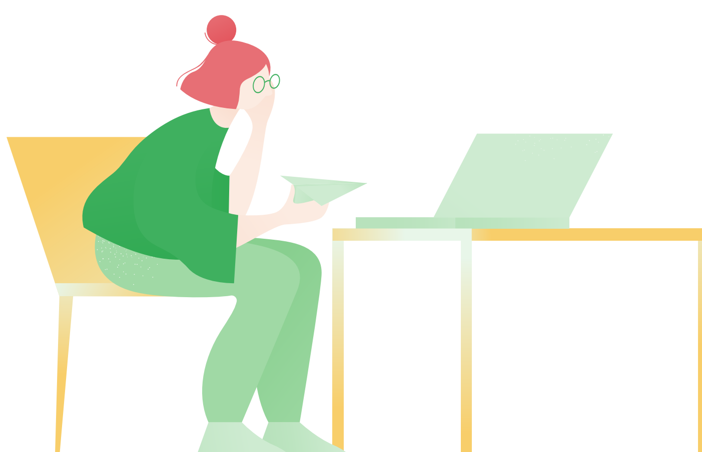
Do you use Asana, Jira, Trello, Basecamp, or other CRMs? Your clients may be more or less technical than you. While some are enthusiastic about using new tools, others may prefer to stick to the ones they know. Having multiple clients also means you're juggling many different processes, tools, and frameworks. As the hiree, it's on you to quickly adapt to your client's project management tools (not the other way around).

Time-Tracking

Tracking your time is super important. You should have a quick and easy way to do this, and this process should disseminate throughout your entire team. Not only do you need to know where your hours are going, but you need to remain accountable to your client. As you track, you'll spot patterns that will make you more efficient, and it could be the difference between staying on-budget or not.

Evaluations

It's not often that a client will take the time to call you up and say, "Great job!" You should establish routine evaluation meetings, where you take the pulse on what's working, what's not, and what your client would like to see more of. Working remotely, you have to work double-time to be present and responsive. Improving off of constructive criticism is one way to do so.



Remote Company Interview: Hailley Griffis

Head of Public Relations, Buffer

Q. What are the keys to establishing a rapport with a remote partner or client – what impresses them?

First and foremost, really clear communication. Whether it's through Slack, video chat, or some other channel – you need a place to get your ideas across. Additionally, you need to be able to communicate asynchronously. You may not be using calls and meetings consistently. I'm closer to West Coast / Mountain Time. If I want to catch people in the UK and Europe, it has to be during my morning. So if there's something that can be done without hopping on a call, I try to do that, because my mornings fill up quickly with calls.

Another thing that works well for us – we like to do introductions via video calls instead of through emails. Even if you don't continue to regularly video chat, communication tends to be a lot clearer after that first video call.

In fact, any time communication starts to feel frayed, it can jumpstart things by jumping onto a video call. So sometimes we'll have several emails back and forth, then jump on a video call to realign, and then work asynchronously.

Q. What would you advise doing when a remote client becomes unresponsive?

I have had some experience with that, both internally and externally. I'm a big fan of a follow-up email. I like to politely set deadlines for when information is due. For example, we recently did a State of Remote Work report.
I had to get quotes from many CEOs. To prepare,I sent a lot of reminders, and gave deadlines with very clear indicators when they were coming up.
If there's more than one company that I know and one person is unresponsive, I might turn to the next person. I don't like to do this, but if it's my only option, I might give it a try.

Internally at Buffer, we use Calendly for a lot of our scheduling, so if I have access to Calendlys, I'll go ahead of proactively book a 30-minute meeting. But that's within our team, and in general, we have close relationships.

With a client, knowing more than one person on their side is ideal, so you can loop in all stakeholders. Whenever we have a client or partner project, we tend to set up weekly or bi-weekly calls. A Monday check-in helps everyone involved to feel like they have more insight into our process. Also, those check-ins are a great way to collect any outstanding responses from overlooked emails.

Q. What key metrics help remote teams remain accountable?

We don't use a lot of key metrics internally at Buffer. It depends on the client and the user. But I would say that as a remote team, we operate based on goals. We define quarterly goals, and track them in a document.

If you're working with a client, you should have some external goals you feel comfortable sharing. As in, "Here's what we're working on for you this quarter, and you can follow along in this document." Ideally, you'd use something that's trackable and easy to share and reference. You don't want to create a job for the client, by giving them an unwieldy tool or data set to figure out.

Q. What's one thing most people don't know about remote relationship management?

I would say that you can still establish extremely positive relationships with people, without ever meeting them. You can have open communication and transparency, even if you're not working face-to-face. That has happened multiple times with us at Buffer.

For example, at Buffer, we have semi-annual retreats. If you start right after one of them, you won't meet many of your colleagues for about half a year. Still, people work together beautifully, and it feels like they've been colleagues for years. I'm always surprised by how functional and productive our teams can be.

It's like that with internet friends. There are a lot of people I know online. I don't work with them regularly. But if we were in the same city we'd meet up. It would be wonderful.

Q. What's in your toolkit for managing remote relationships?

So many things! I'll list them here:

- Calendly
- We do a LOT of Zoom calls, including our entire all-hands
- Slack
- Company retreats, for those rare, critical in-person gatherings
- Timezone.io or other tools that you use to figure out what time zone someone is in
- Teambook
- Shared calendars on Google, where you add start and end hours

CHAPTER 2

The Spark: How to Land Remote Clients

How Is Landing A Remote Client Unique?

When you're aiming to land a remote client, you probably have no idea when the first impression happens. You may not know where they come from – was it your website? Word of mouth? Advertising efforts? That means you need to be light on your feet and ready for anything.

You should assume that you're visible and being considered by prospective clients at all times. In a sense, you're always pitching. Your online presence needs to demonstrate a track record of proven-results in your core industry.

Your Remote Outreach Plan

Step 1: Informational Interviews

Research clients in your target sector who have hired remote agencies or agencies in different geographic areas to their head office. Send them a quick email and ask if they can spare 10 minutes of their time. If you can't figure out who to ask, find remote organizations and look at their client list.

When you're able to connect with someone, ask why they hired the remote organization, how they found out about them, what pain points the organization solved, and how were the expectations laid out?

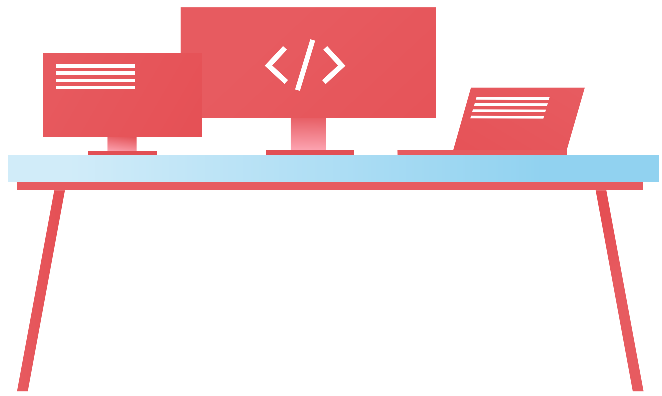
A sample email:

> Dear X,
> I just saw the [specific project/redesign/launch/initiative] you did and it's amazing – I esp I run a remote web development agency and I was wondering if I could ask you a few questions about how I can best serve my roster of remote clients.
>
> You're a leader in your field, so I was hoping you might spare a few minutes to share any insights with me, specifically on:
> 1. Why you hired a remote organization to handle [project]?
> 2. How you found out about them?
> 3. What the pros and cons of working with a remote organization were?
> 4. How remote organizations can make your life easier?
>
> I promise to keep any calls shorter than 10 minutes so as to respect your time. If it's easier, a quick reply via email would also be great.
>
> Look forward to hearing from you, when you have a moment!
>
> Best wishes,
> X

Not everyone will take the time to reply, but keep going until you have a foundation of 5 to 7 responses. You may start to notice common points between your interviewees.

Step 2: Solve a Pain Point in Advance

A good way to get a prospective client's attention is to solve a current pain point they have. If you're a web agency, recommend technical changes that might streamline your client's work. If you're a designer, send a redesign mock-up and explain why you did it. If you approach potential clients with an idea that will make their business better, they probably won't care what city you're working from.



Step 3: Use Virtual Job Boards

Look at Smashing Jobs, Upwork, WeWorkRemotely, Fiverr, FindRFPs, and TopTal. Even if you're a larger organization, you can see the types of clients that are willing to hire remotely, and what they're looking for. This should give you a good foundation of websites to peruse and clients to pitch.

Step 4: Reach Out to Your Contacts

A short email to your friends and acquaintances goes a long way in helping you to find work. Send informal, personalized emails describing the work you do and the type of clients you're looking for. You can even offer a referral fee.

A sample email:

> Hi X,
> Did I tell you I started a remote copywriting agency?
> Check out my [website / portfolio].
>
> I know you're super connected to startups and entrepreneurs, so I was wondering if you knew of anyone who needed copywriters? I'm in the process of developing a roster of remote-friendly clients. If you think of anyone now or in the future, please keep me top of mind. I'd be glad to offer a finder's fee in addition to my gratitude!
>
> Speak to you soon,
> X

Step 5: Speak to Other Remote Organizations

You're not trying to steal clients, but you're looking for information on best practices and business development. When you immerse yourself in remote communities in your sector, you'll find that you can establish a rapport and make friendly connections. Both online and offline, you'll find groups through social media, networking events, and professional organizations. Introduce yourself and put yourself out there. Offer to help pick up the slack if ever someone finds themselves overwhelmed by their workload.

Being candid and upfront about the advice you're seeking is sure to open up at least a few doors. A sample email:

> Hi X,
> I know you're busy and you charge for your services. We're a new remote web development agency, and I was hoping you'd have time to quickly answer – how did you land your first few remote clients?
>
> Thanks for any advice you can provide,
> Y

Step 6: Create Remote-Friendly Content

It seems like everyone has a podcast, blog, newsletter, or a YouTube channel these days. But if you're going to get in the game, it's not a bad idea to start creating content for your audience. Because you're remote, one unique angle that generates a lot of interest is remote work and the future of work.

Get the conversation going around remote work in your industry from your own unique perspective. Not only will you continue to learn, make connections, and hone your process – you'll position yourself at the forefront of leadership around remote working.

Step 7: Do Your Homework

Using something like The Briefcase Technique, make sure that when a lead replies to you, you do your homework first. Reply quickly and promptly with next steps. It can be easy to focus solely on landing leads, only to ask yourself "Now what?" when they start rolling in. Show up to a preliminary meeting with detailed ideas about how you want to solve your potential client's pain points- even before budget or onboarding are discussed. Outreach is where you prove your value to the client, and possibly where you demonstrate that they simply can't go another day without paying you to implement your custom plan for them.

Remote Outreach Do's and Don'ts

Do maximize your digital literacy. Some clients will want you to join their Slack channel, others might ask you to work within their CRM or project management system. Everyone's different, and you will be expected to adapt quickly.

Do build an online presence. As a remote client you live online, so assume that a robust presence bodes well for you.

Do get feedback from current clients. If you are already remote – what's working and what could be better? If you aren't yet – what would they need from you in order for you to be fully remote? What would they expect?

Do automate your admin. Use apps or outsource your invoicing, taxes, operations, accounting, parts of your hiring, and/or customer support. Each moment you're spending on these tasks is a moment you're not engaged in client outreach.

Do show up armed with case studies. If a client is skeptical about how you would work together from different locations, be prepared to talk about how you've already made it work.

Do partner with other specialists. You can partner with specialists that don't work in-house, but whom you can call on when clients need that service.

Do use canned responses or templates to reach out so that you save time.

Do tweak your canned responses and templates so they feel personal and aren't an obvious "spray and pray" business development tactic.

Don't assume a client has ever worked with a remote organization before; be prepared to do the hard-sell on why it will work for them.

Don't forget to educate your client. Tell them about the strategy behind your work and why being remote makes your team more efficient, productive, and creative.

Don't stay anonymous, just because you're not planning to work in-office. Set up a phone or video call to discuss your pitch.

Don't over-communicate. A barrage of emails can overwhelm and appear disorganized. Break up longer messages into bullets or numbered lists, and make any asks bolded and italicised.

Don't use unnecessary stories or personal anecdotes. You don't have to make up for in-person relationships by being overfamiliar; that may not fly for your client base.

Don't lose track of your email. As burdensome as it is, if you take 3 days to reply to a client inquiry, you're likely to lose the business.

Don't expect prospective clients to communicate on your schedule or preferred communication channels.

Don't try to be all things to all prospective clients. Just because you don't have in-person accountability doesn't mean that you can shirk accountability altogether. If you can't take on a project or if you're not equipped for certain work, don't try to lie your way through it.

Remote Company Interview: Jake Goldman,

President and Founder, 10up

Q. What are they keys to establishing a rapport with a remote partner or client – what impresses them?

For a client or partner, as much as we are fully remote and distributed, we do not forsake the importance of meeting together in-person. Earlier on in a sale, for the right opportunities, we will come on site. Not every opportunity merits that. But at the kick-off of a project, we encourage in-person workshops or meetings to jumpstart the relationship. I won't argue that there's a benefit to taking a client out to dinner. We understand the value in doing that.

Although being remote is unique, it's a fact of life these days. For many agencies and services, they'll work on projects with teams that aren't in the same geographic area. No matter what, agencies don't tend to sit side-by-side next to their clients every day. So you may already have more remote-ready infrastructure in place than you think.

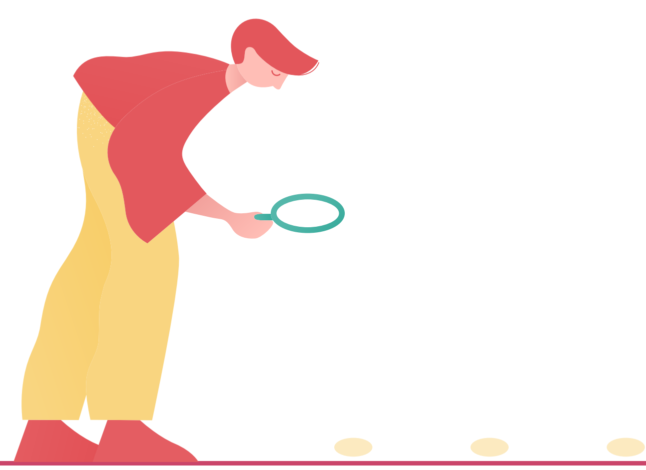
Another thing we do is we insist on a "cameras-on" policy (unless we're on the road with a bad connection). We'll do video conferences in well-lit rooms. Sometimes as a partly-tongue-in-cheek measure, we'll even send webcams to clients. We encourage customers to come to us with their video on. We don't dismiss the importance of non-verbal, non-written communication, and we like to get that across.

Internally, we have an annual, week-long retreat so that we experience those in-person moments that sustain us through the remote times.

It's hard to give universal truths when it comes to the business development process. But ours is pretty similar to non-remote agencies. We pound the pavement in local communities, just like anyone else would. We also know of cases where agencies started with physical offices in big cities like NYC, but have then went remote after realizing ¾ of their clients weren't actually in NYC.

Q. What's your go-to case study for a time you hit it out of the park with remote work?

I don't have a single case study. One of the things I talk about being unique in a remote model is that you're forced to measure real productivity on an engagement. It's convenient to see someone show up at 8:30, be friendly in the break room, and then leave at 6 PM. When they show up at work and seem to be at their computer, that looks like productivity. But that's a fallacy. From remote, I can't judge that. Remote productivity needs to be all about output and time logged, as opposed to convenient but lazy ways to measure, like facetime at the computer.



Q. What key metrics help remote teams remain accountable, both internally and externally?

Because we're an agency that services firms, we have a delivery and production team. We do time-tracking, which involves weekly project reports for customers that show hours worked. Even if you work remotely, for agencies there's a built-in motivation for analyzing the value of your time spent week-over-week.

We also have other metrics internally. People self-score how they feel about their productivity. We have 1:1 check-ins, sprints, and standups for measuring our accountability to our team and clients.

And we do specific rolling averages, so that we can estimate billable time across teams. We tend to look at estimates vs. actuals once projects are underway.

One thing remote teams struggle with is being hypercritical to themselves about productivity. Sometimes, I remind my team that it's okay to be at 30 hours one week, and then more hours the next week. Some weeks are slow, and others are crazy fast. So we always try to reinforce that billable hours work on a rolling average.

> *"One thing remote teams struggle with is being hypercritical to themselves about productivity."*

Q. What’s one thing most people don’t know about remote relationship management?

I think that people can underestimate the social challenges of the model. For example, I don’t know that everybody thinks going into it about how much they might as an individual think of work as the foundation for social life. We would generally discourage someone who is maybe just out of a relationship, moving to a new city, with no family in the area. That person would probably find remote work difficult. To compensate, either you have to go to events and clubs, be a social butterfly, or you will struggle pretty quickly.

Conversely, people that have lived somewhere for a while or have friends from a prior job and are established in social and familial life? Those people tend to be a lot happier.

Q. What’s in your toolkit for remote partner or client management?

We use a lot of the usual things! Slack. Zoom. G-Suite calendaring and email. Some brand new tools that work on peoples’ working hours and availability.

One tool we use is Teamwork. Where Basecamp and Jira can be fairly complex and ticket-based, Teamwork is a nice happy medium.

We also use Friday. It’s a weekly way for the team to self-assess and share open reflections. It can be useful for pulling things out of people that might not come up in a virtual 1:1. It helps to bridge the gap for things you might see when someone is in an office.

Q. Your website says "Influencing communities around the world, our team leads meetups, speaks at local events, and visits clients wherever they may be." Do you think it's necessary to have the occasional in-person element to a long-standing partner or client relationship?

The in-person helps, with the right frequency. From a business standpoint, I don't want to eat a third of my margin bringing out the team. So it depends how much we invest, and that's based on the scale of a project and customer preferences. Beyond kick-off, we will find times to bring out key players for annual or quarterly planning.

CHAPTER 3

The Honeymoon Phase: Connecting with Clients You've Never Met Face-to-face

The Remote Onboarding Process

New client onboarding is tricky when you're not on-site. You have to coordinate teams, schedules, admin, and operations. You also have to make it look seamless – like you've done it a million times before – to your client.

First impressions matter. If you've done it right, you've gotten your client super excited to work with you during the pitching process. Now it's time to deliver. Even out of sight, your client still needs to feel like they're top of mind.

There's no one-size-fits-all approach for client onboarding and kick-off. However, there are some best practices you can try to follow:

1. Customize your onboarding to specific client needs

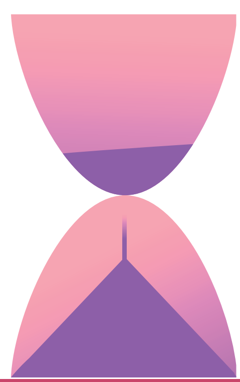
Clients, like anyone, just want to feel heard. Make sure you've taken the time to map their needs to your project work, right from the get-go. Document these needs and how you plan to address them in an overall strategy, during one of your first meetings. Err on the side of overcommunication. Try to convey that you understand your clients' fears and hopes for working with you.

2. Appear VERY organized

You always want to be organized, but in the onboarding stage, it's absolutely critical. Since your client can't always see what you're doing, make sure you come across as extremely organized. Don't let a single email go ignored. Don't communicate intent to do something and then overlook it, or do it on a later schedule that originally stated. Have all paperwork ready before initial meetings, and take the lead on setting agendas and deciding on next steps.

3. Aim for a Quick Win

Onboarding and the first weeks of work are critical for you. You're being evaluated on whether you, as a remote organization, can deliver in the same way that a non-remote team could. So aim for a quick win – can you make a rapid change to a website, template, or process that leaves your clients pleased? Try to get something positive done within a fast time frame, so that you start off on the right foot.



4. Decipher Communication Patterns and Preferences

While you want to err on the side of transparency, you also don't want to overwhelm your clients with emails, calls, and video updates. If you're trying to get your client synched up to your Slack but they would rather not use Slack, don't make them cranky by overlooking that. If they'd prefer that you keep the updates to once-a-week maximum, don't overstep.

A Sample Remote Client Onboarding Workflow

Here's a sample workflow you can try out with your next remote client, to make sure that you're following best practices.

1. Set up a "Big Vision" Video Call

You're going to work together. What does the big picture of your collaboration look like? Which individuals and teams will be involved, and what do you hope to accomplish? Can you talk about general time frames and budgets? The first part of onboarding is determining what success will look like, and setting expectations about how to get there.

2. Set up a “Specific Details” Call

You’ve gone macro, now it’s time to get into the details. From specific resource allocation and estimated timelines to tools you’ll be using, this call maps out the painstaking details of what’s to come.

3. Set KPIs and Deadlines

On each side, at least one person will need to deliver the collateral that makes your campaign move forward. What are you both responsible for delivering? How will you specifically measure success? Document it, and make sure it’s very clearly understood by all stakeholders. Submit firm deadlines for these deliverables.

4. Create Regular Check-Ins

Looking ahead – when will you discuss your project’s progress? Will you have weekly calls, quick email updates every-so-often, or more formalized meetings? Onboarding is the time to lay out expectations about where progress, questions, and insights are discussed.

Get Off on the Right Foot: Client Onboarding Checklist

Pre-Meeting

- ☐ Gather all information about your client
- ☐ Add to database or CRM
- ☐ Send welcome email and kick-off
- ☐ Request client address (for future use for gifts, thank yous, or other recognition)
- ☐ Send any contracts, disclosures, or legal documents for e-signing and reviewing
- ☐ Send initial meeting agenda and allow space for client to add agenda points

At Kick-Off Meeting

- ☐ Give online account access
- ☐ Collect signed contract with all e-signatures
- ☐ Walk through finalized agenda (with input from client)
- ☐ Write up and share meeting notes
- ☐ Add meeting notes to shared CRM or database
- ☐ Decide on next-steps

Post Kick-Off Meeting

- ☐ Send any requested information
- ☐ Reiterate next steps and deadlines in written format
- ☐ Send updated first month project plan and status

Remote Company Interview: Madhav Bhandari

Product Marketing Manager, Close

Q. What are they keys to establishing a rapport with a remote partner or client – what impresses them?

Remote partners or clients really appreciate regular updates. If you can, send them every week or two with bullets on: here's what is happening, here's where we arrived, here are potential issues, here are potential roadblocks, here are wins. If you proactively send updates without them asking, clients usually appreciate that.

Remote communication set-up also feels critical. Remote communication is an extension of your intention. Your communication is a form of ownership. You've taken it upon yourself to deliver x value to a client, and every time you send updates, you're re-stating your commitment to that delivery. If the value stops being demonstrated, you should probably stop billing for it.

If you show that genuine care and ownership with clients, they actually love that. They love to work with these types of companies, remote or not.

Q. What's your go-to case study for a time you hit it out of the park with remote work?

For me, and I can speak for our entire team, it's that I can network globally while sitting here in New Delhi, India, without going to specific conferences or networking events. I've built a great network entirely remotely. That's a huge accomplishment.

Writing as a medium has been a powerful tool for networking. When you write something, you reach out to the entire world – whoever is interested. The reason we create content – videos, blog posts, etc., – is that it's allowed us to build up a massive network.

If I'm in Chicago, I know I can meet someone for dinner or host a customer meetup. I was in 6-7 locations last year, and I met up with remotely-made friends in all of them. In Sydney, I met up with someone I'd met through writing.

People think that if you're remote, you're working in your own silo. To make up for it, most people would say that conferences can bridge that gap. But conferences don't give you true, sustained networking the way blogging can.

I have written lots on how we've created a great remote culture within our sales team, and how to network globally while working remotely. Blogs can extend into Medium partners, integration partners, and webinar partners. With all of these partners, you have a common interest and a well-aligned audience. The relevant people find it, and continue to reach out to you – it pays dividends.

Q. What key metrics help remote teams remain accountable, both internally and externally?

For us, a core metric is 100% transparency. Within our developer team, our marketing team, our customer success team – we have 100% transparency, interchangeably.

Going very specifically into metrics is difficult, because there isn't one way to go about it. But weekly updates are very important. On Mondays, we run sprints – we declare we've been assigned x tasks and are working on y projects, and by the end of the following week, I'll update everyone "here's what I really worked on, this is what's blocking me, and here's what we have planned." That's everyone's chance to collaborate and ask questions. People ask "what is the "Where will you see an impact?" That helps keep us consistently accountable.

Q. What's one thing most people don't know about remote relationship management?

With remote relationships in particular, time zone management is something that still requires some effort. The unwritten rule is that you usually schedule meetings from 9 to 5. But those unofficial hours when working people are willing to take a call are crucial. If I know that someone is okay to do meetings later in the evening, while someone else prefers earlier – I learn that over time. Then it's easier to get team members talking to relevant clients in the right time zones.

Q. Do you think it's necessary to have the occasional in-person element to a long-standing partner or client relationship?

I do feel you need to meet in person. I've been with a remote company for seven years. And there's a company I was with where for the first two--and-a-half years, we were just remote. We never met. And the thing was that – at that particular point in time – you kind of stop believing they exist, in a way. You talk on Slack but it's not the same as you'd communicate if you were in-person. You keep the relationship very work-related. You can almost stop seeing them as human.

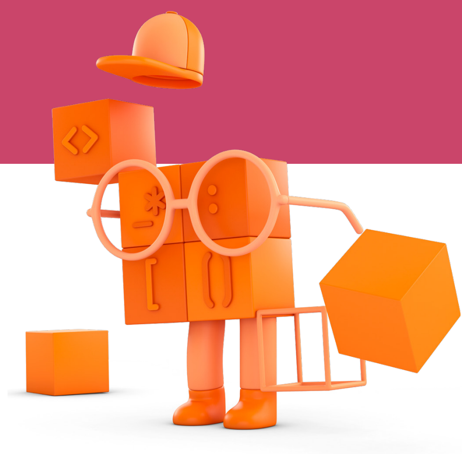
At Close, we meet every 6 months somewhere. And that is the most valuable time for our team. It's very intense, you have all these one-on-ones and meetings, but it's essential. We work with such a talented bunch and these are real people, so if fuels you for the next six months.

Q. What’s in your toolkit for remote partner or client management?

We use Jira. We use Asana. We use Close, our own product, for every interaction that we have for every client. That’s where our 100% accountability and transparency comes from, it’s central to our relationship-management. We use Calendly for all appointments and meetings. And the last thing we use is a Dropbox and Google Drive storage system where we maintain everything.

CHAPTER 4

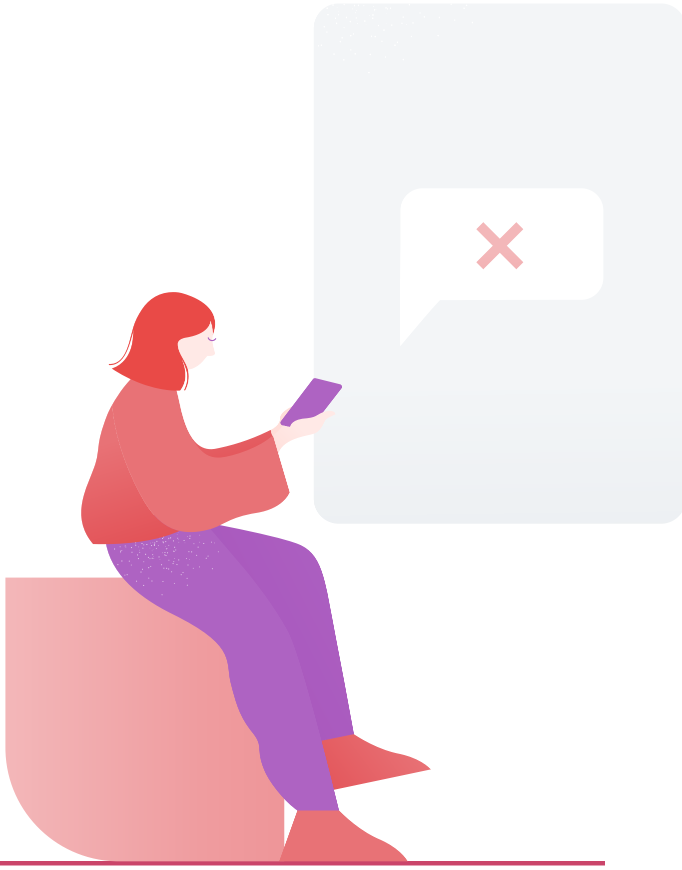
Counseling Sessions: When Things Go Wrong



There's plenty that can go right with remote clients – no hectic commuting! No boring conference room time-wasting! No awkward chit-chat! But sometimes, remote client-work has its challenges.

What do you do when you start getting the feeling that the bloom is off the rose? While relationship-management can be immediate when you're face-to-face, from a distance it's going to require a little more dexterity.

The question isn't if you're going to experience challenges, the question is when. In this section, we tackle the most common client challenges, and provide plenty of fodder for how to solve them.



What To Do If....

You're Overworked

Unlike the stereotype of remote workers, phoning it in and taking too many breaks during the workday, you or your team may actually be overworking. Studies show that remote workers tend to have difficulty turning off. When you're not picking up on external cues, like colleagues leaving at the end of the work day, you may tend to feel like you should keep working, and working, and working.

Is everyone on your team remembering to take breaks? Are they hooked on their email, and getting messages around the clock from all different time zones? Do you feel you can step away from your work without things falling apart?

There's always more to be done. That's why you were hired in the first place. But you need to give permission to yourself and your team to truly turn off and rest.

The Fix

- **Treat breaks like meetings** – "At noon, I'm going to stop working for an hour and take a walk." Even put them in your calendar, and encourage your team to do the same.
- **Group calls together** – Set meetings close together, so that you can feel like after a particularly productive morning or afternoon, you're allowed to take time off.

- **Turn your Slack onto "Snooze"** – Slack's automatic settings are to snooze from 8 PM to 8 AM, so take them up on that suggestion and snooze your notifications each night.
- **Track your time** – using a tool like Toggl Premium, track your time and see the patterns in your team's time-tracking; account for all minutes worked so you can avoid team burnout.

You Struggle with Prioritization

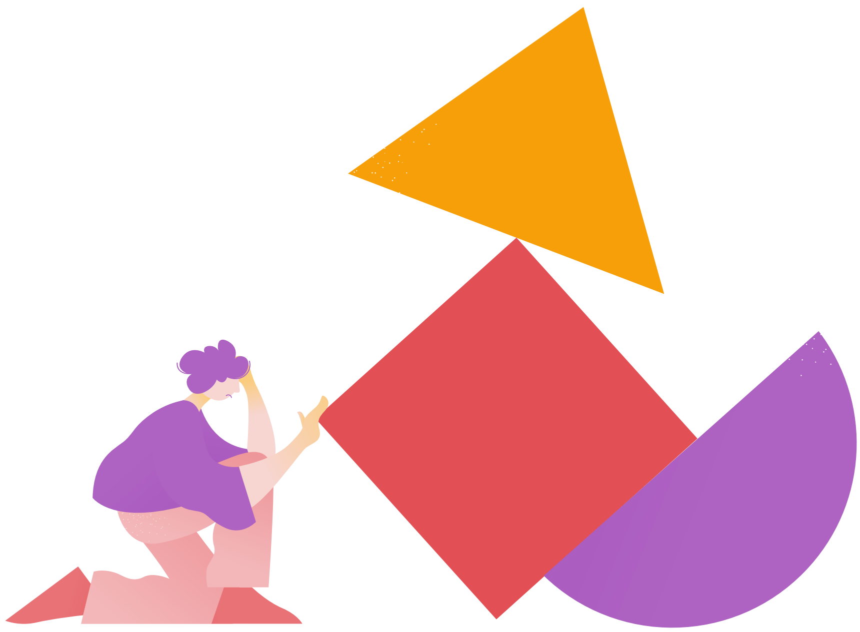
Everyone works at different paces, and sometimes on client projects, your deadlines are very long-term. How do you ensure that everyone's on the same page when it comes to prioritization?

Don't wait until the moment your client is emailing, slight panic detected behind the words, "just checking in" about status updates and ETA on delivery. Even worse, when that email does come, and you have nothing to show for it, that's when your panic starts to set in.

The Fix

- **Status updates are deliverables** – Before the client asks, you should have somewhere during the week where you jot down what you're doing, any blockers, and small wins and accomplishments. In a pinch, this will be your lifeline in giving status updates between deliveries.
- **Zero in** – Accomplish one thing a day, even if it means ignoring lesser tasks or longer-term efforts. You can even try The Muse's "1-3-5 Rule" and make your to-do list super accomplishment-oriented.

- **Go full transparency** – Keep works-in-progress in a shared drive, and keep meeting notes, OKRs, and brainstorms in an easily accessible place, so clients can check in and monitor progress.
- **Use distraction-blocking apps** – Yes, occasionally, as a remote worker, you fall prey to distraction. Use distraction-blocking apps and websites so that your productivity stays on track (we love Self-Control, for example).



Communication Falls Off a Cliff

You may feel like everything's going well, but what happens when it starts to feel like your client is ghosting you? The possibilities race through your mind – are they looking for your replacement? Are they dissatisfied with the work? Is their morale flagging? Are they even still alive?

When a client who used to communicate regularly starts becoming, well, irregular, alarm bells sound in your head. Before this disconcerting silence turns into something more catastrophic, there are several steps you can take.

The Fix

- **Don't panic** – It could be that your client stopped communicating for a number of reasons, several of which aren't bad. Maybe they're just comfortable with the way things are going, or are busy in other areas.
- **Escalate the communication** – If you always communicate by email, try escalating to a call. If you always communicate by phone, try escalating to a video conference meeting. If it's possible to meet in-person, go for it. Be proactive about communicating in clearer, more personal ways.
- **Emphasize deadlines and consequences of missed deadlines** – Shine a light on upcoming deadlines and what happens when they're missed, not in a threatening way but in a "We won't be able to get X done" way.
- **Plot your Plan B** – If your fears are coming to fruition, and the client is getting ready to let you go or change the terms and conditions of your contract, have a plan in place for how to respond. Maybe that means putting feelers out for new work, plotting wrap-up tasks and final deliverables, and having a frank discussion with your team about what the end of the project might look like.

You Encounter Cultural Differences

Once you've kicked off your project and everyone has stopped being super duper "beginning of a project" polite, that's when the real fun starts. You'll gain

a better understanding of which individuals on the client side are pleasant, which are not-so-pleasant, and how exactly your clients like to work, week-in and week-out.

If you're a foosball-and-dogs-on-conference-calls type of operation, and your clients are suit-and-ties people, you may have trouble bridging the cultural divide. Traits and quirks that aren't readily apparent at the jump may start to seep into your communications, and cause friction.

Not to mention that over email and instant messaging platforms, small misunderstandings can quickly become major drama. Electronic communications can create bad blood with alarming efficiency. When there's no friendly body-language or water cooler bonding session to ease the tension, paranoia can squirm its way in.

The Fix

- **Do as the client does** – Your client calls the shots at the end of the day, because they sign the checks. Practice being adaptable, and understand that you'll have to do some adjusting to meet client standards.
- **Be secure in yourself and your team** – The client hired you for a reason. Maybe the suits-and-ties enjoy a break from their stiff, formal atmosphere. After all, they hired you for your creativity / experience / charm / insert other winning character trait here.
- **Socialize where possible** – If bridging the cultural gap reaches a critical point, it could be worth it to fly key members of your team out for a site visit

or a dinner. Assess whether it's time to get to know each other in-person before problems escalate.

You've Met Your Your Technology (Mis) Match

You could be the most internet-savvy operation in the world, but you'll still encounter the occasional internet outage. No problem, to an expert such as yourself. But to a client? Potentially a disaster.

Technology makes people nervous. If you try to get your client to join Slack channels, CRMs, and collaboration tools, they may soon be running for the hills. Instead, the onus of a stable, easy-to-understand technology framework is on you.

If your client wants you to use their suite of tools, you'll have to jump in and figure them out. You'll also need to find a work setup that includes a quick internet connection and a noise-free environment in which to take calls.

The Fix

- **Find a solid WiFi connection** – Whether it's at your house, in a coffee shop, or at a coworking space, this is the number one thing. Everything else follows after WiFi.
- **Practice before calls** – Click that Zoom link ahead of time. Test your microphone. Practice screen-sharing. Make it look easy when it's time for the client to jump on your call.
- **Create tech tool playbooks** – To get your client on the same page,

provide them with playbooks and foolproof instruction guides for the critical technology you'll need them to use.

- **Have a backup plan** – Tethering from mobile phones has saved many a remote worker. Imagine a tool breaks, the internet cuts out, or the screen freezes. What will you do? When it happens, approach it with good humor and a smart backup plan.

Remote Company Interview: Fadeke Adegbuyi

Marketing Manager, Doist

Q. What are they keys to establishing a rapport with a remote partner or client – what impresses them?

Be flexible and obvious – With each interaction, provide them with multiple options on how to communicate.

Ask whether they want to coordinate work asynchronously through email or a team communication tool like Twist. We sometimes invite partners into our team communication tool where they have a direct link to us and a dedicated space for the project we're working on together.

If they're interested in more face to face, give them that option too. Let them know you're open to chatting over the phone and through Zoom or Google Meet. One thing I like to do is look up where a partner contact lives in the world and propose a few times using their timezone, not mine. Also, take the lead on doing all the scheduling and logistics. Propose the times, send the email invite and everything else that makes it easy for them. Another tip for email invites is adding your name and company at the start of the event name so it's optimized for their calendar and they know who the meeting is with at glance.

Be clear about what you respect about them – Why are you excited about working with this partner or client? Do research about a partner and make it known that you've done your homework and working together extends beyond a financial benefit and involves a true culture fit. This is always a nice way to start off a conversation before getting down to business.

Q. What's your go-to case study for a time you hit it out of the park with remote work?

Our entire team is composed of 68 people working from 25 different countries. Everything we accomplish is through remote work! I think a surprising result is going from a one product company with Todoist to a two product company with the launch of Twist. There's been debate about whether teams can innovate remotely, and we believe this can absolutely be the case. We launched a new product in 2017 that's a really unique take on team communication and the always-on culture of a tool like Slack that helps teams focus on work instead of chat through mindful communication.

In terms of client relations, something I loved working on was our Todoist Year in Review in 2018. It's an annual campaign that gives users a deeper look at their productivity statistics. Entirely remotely, I worked with partners to provide prizes for our users as part of this campaign. The end result was a really great personal resource for our users with prizes and discounts for users from companies including Skillshare, Shift, ZenScreen, Sanebox, RescueTime, and TimeDoctor. A lot of the companies were partnered with also happen to be remote!

Our Head of Business Development, Chase Warrington, conducts more client work than anyone on our team. He regularly coordinates really interesting partnerships remotely. Recent examples include Running Remote and Product Hunt.

Q. What key metrics help remote teams remain accountable, both internally and externally?

In our remote setting at Doist, we're never on the clock. We don't have dedicated hours you need to work and we're not using team time-tracking or screen monitoring tools. We simply default to trust. With this setup, you're measured purely on output. It's about what you produce, not how many hours it took you or whether you did it at 6am or 6pm.

Our key metrics for remaining accountable naturally vary from team to team – it's going to be different if you're on the Marketing team vs the Development team.

On our marketing team, we're focused on increasing the # of app downloads, # of successful product launches, # of of blog posts we publish, # of social posts and social followers we cultivate.

For our Development team, we're focused on improving existing features and bringing new helpful features to our users across all our platforms like iOS, Android, Windows. For specific metrics this could be # of features shipped. Alternately it can be # of support tickets received – if we're receiving an influx of tickets about a recently shipped feature, it likely means we went wrong somewhere.

For each of these areas, there's a clear "Directly Responsible Doister". This is built in accountability. If an area is lagging behind, you know who might be struggling and that a conversation on improving need to occur. Alternately, if an area is thriving, you know someone is doing a great job.

Q. What's one thing most people don't know about remote relationship management?

Managing a remote relationship often improves communication between stakeholders. You're not meeting casually over drinks or getting together in a boardroom. This often forces you to be more explicit with our communication through text and ensures everyone is on the same page.

Q. What's in your toolkit for remote partner or client management?

- Email – This is typically the first point of contact between partners where you're sorting through details and coordinating next steps.
- Twist – This is our team communication tool where we often add people as Guests. This way they have a direct line to us at all times and we can organize discussions a lot more succinctly than you would over email. For instance, we're currently working with a podcast agency and after a bit of back and forth over email they were happy to jump into Twist and keep the conversation going there.
- Todoist – If we're working through a bunch of small tasks together, we sometimes invite partners into Todoist so they can view the status of a project, add their own tasks and vice-versa.
- Zoom/Google Meet – We default to asynchronous communication, but it's always nice to meet face-to-face at least once for a kick-off call. This can be great for establishing rapport and getting on the same page more quickly than would be possible with text.
- Follow-up – Not a tool per say, but really important both throughout a project and after a project. During, it's important to keep things on track. Sometimes the asynchronous communication chain goes cold and it's important to be cognizant of that and keep things running, particularly for long term project. It's also important after a project is complete. It's great to keep in touch about how a partnership is performing, and whether there's future opportunity for collaboration.

CHAPTER 5

Happily Ever After: Long-Term Client Satisfaction

A 5% increase in customer retention correlates with at least a 25% increase in profit. That means that it's pretty great for you when your clients want you to stick around. To make sure they continue to perceive the quality of your services in a good light, there are several things you can do.

The Blissful Ever-After

Bringing on the right clients can be a guessing game. Sometimes it works out, sometimes it doesn't. Sometimes you just get lucky (or unlucky). But you do have some control in the matter. Here are some things you can do to encourage long-term success.

1. Schedule Regular Calls

Communication resolves most issues. Schedule regular calls with your clients, for no other reason than to check in on how things are going, how satisfied they are, and what you could be doing to improve. Think of these calls as deeply targeted customer satisfaction surveys (for an audience of 1). If things aren't going 10/10, ask why. If everything is going swimmingly, also ask why. Both are valuable pieces of feedback.

2. Use Them In Side Projects

If you're mapping out a case study, testimonial, or writing an ebook, include your clients in the content. They'll feel like they're a VIP, and you can use it as an opportunity to get some of their messaging across, or include a link to their site. They should understand that you prioritize them as long-term clients that go beyond the daily grind for revenue.

3. Surprise And Delight

Have you ever heard the marketing term "surprise and delight"? Do something delightful for your client, out of the blue, just because. Whether it's sending a useful gift, delivering them a pizza, or using your creative muscle to design something for them – thoughtful ges
tures go a long way.

4. Be Punctual

Even if you've been working together for years, you should never let communications drop off. Reply to all emails and Slacks in a punctual manner, or if you can't, have away messages and snoozed notifications. Quick response times indicate that you're prioritizing your client's needs.

5. Display Your Wins

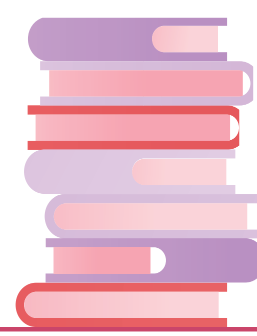
When you're increasingly known as the best in your field, that social proof comes in handy should your clients ever reconsider working with you. If you have a roster of big clients raving about you, put those on your website. Aim to be quoted in prestigious media platforms. Shout out awards you receive or distinctions given to you.

6. Be Personal

You can have friendly relationships with clients, even if you're not operating in the same physical space. Learn about their kids, their hobbies, and wish them a happy birthday. Allow them to do the same for you. In an ideal world, your client looks forward to chatting with you. In the event of an error or a down-month, those personal relationships can foster client patience and help you weather the storms.

7. Stay Professional

There's an inevitable amount of familiarity that comes with working with a client over a long period of time. Still, you cannot afford to stop coming up with bold ideas in a decisive manner. Your clients hire you because they see you as an authority. It's up to you to maintain that sense of authority. Don't waffle, act uncertain, or forget to do your research.



8. Come Up With New Ideas

Don't wait for your client to approach you with new initiatives. Instead, you should be on the lookout, and proactively suggest new ideas. Map out an idea for a new marketing campaign, or conduct an audit to find opportunities for your client to get more mileage out of their budget. When they get the sense that you're constantly looking out for them, sticking with you for the long-term is a no-brainer.

9. Make Sure You Understand Their Long-Term Goals

You will stop delivering relevant results if you lose grasp of your client's long-term business goals. Don't just understand their product offerings, but understand what success looks like for them. Your internal KPIs may have very little to do with how your client sees their business.

10. Burn No Bridge

Sometimes, clients need to let you go, or forego the opportunity to work with you in the first place. Rest assured that some of these missed opportunities will come back around in the future. Be gentle and kind about any ties being severed. These relationships are not necessarily over forever, but can instead serve as important referrals for other clients or future projects.

The In-Person Meetup

Whether it's at kick-off or further down the road, sometimes you just want to meet a client face-to-face. It takes a dedicated effort to get the gang together, and going in you should have a plan for how to make the most of it. You might be 4, you might be 40 – here's what we know about pulling off a productive in-person meetup.

Location

Unless you have an incredible destination in mind that would wow your client, you should plan to meet them at their office. It should be optimally convenient for your client to interface with you, and that probably means you're flying to them, not the other way around. Make sure they have a space that can hold everyone you plan to bring, where everyone can sit down and have room to plan on their laptops and/or a whiteboard.

Length of Time

Try to get the most out of your meetings, without overstaying your welcome. You should be respectful of everyone's time. Try to limit your meetings to workday hours, with an option for socializing at night that your client can take or leave. While dinners go a long way for morale and camaraderie, the most important discussions happen in meeting rooms.

Agendas

Try to plan discussion agendas before you set foot on a train or plane, and get buy-in from your client. If they know "We plan to discuss X, Y, and Z," they'll feel more comfortable welcoming you onto the premises. They'll also understand that you don't plan to talk the entire time. Your agenda should be mostly about listening, with your own input provided on request, as well as during the follow-ups when you return home.

Team Inclusion

You're on-site so make use of everyone on-site, not just senior managers. While seniors and execs are the final decision-makers, others in the room are also doing business with you and your team. Make sure that they feel heard, and that you give them the opportunity to discuss their day-to-day priorities and goals.

Follow-Up

Your meeting may be a first impression, but your follow-up creates a lasting impression. Make sure you recap discussion notes, outcomes, and next steps. Include all relevant materials, and send any items that were requested. A crisp and professional follow-up note will ensure that you maintain some of the good will generated by your efforts to meet your client on-site.

Remote Company Interview: Darren Murph

Head of Remote, GitLab

Q. What are the keys to establishing a rapport with a remote partner or client - what impresses them?

It's largely similar to establishing rapport with a face-to-face client. You want to be reliable, a proven listener, and someone who keeps their promises. In a remote scenario, communication is essential, and there's more nuance in recognizing the communication style of the client and adapting to suit that. Don't be afraid to inquire on how they prefer to communicate, be it email, text, phone, Google Docs, video chat, etc.

Q. What's your go-to case study for a time you hit it out of the park with remote work?

I worked with the founding team at SnapPower to build an editorial strategy and PR plan for a new product. We ended up raising nearly $1m via Kickstarter and generating dozens of highly visible media hits. The founding team was distributed, and I never met any of them in person during the project. We leveraged calls, video chats, and collaborative documents to efficiently guide a successful launch.

Q. What key metrics help remote teams remain accountable, both internally and externally?

In a remote setting, it's important to monitor output rather than hours worked. Metrics vary from project to project, but the key is deciding on clear, concise, reasonable metrics before the project begins. Take time to get agreement from both parties before diving in. Attempting to sort out metrics at some point down the road is a recipe for confusion and frustration.
Particularly in a remote setting, metrics need to be documented. When everything is written down, it's easy for all parties — even parties that join mid-project — to assess progress.

Q. What's one thing most people don't know or would be surprised by about remote relationship management?

That it's effectively the same as in-person management. There's no magic elixir needed to manage projects remotely. You need motivated, inspired colleagues, the tools to do your job, attainable goals, a vision for what success looks and feels like, documentation, and trust. That's no different than managing people and projects while sitting beside one another.

Remote management gives both parties more freedom to execute in environments that suit them, without the drag of a commute, designated work attire, or clock-watching.

Q. What's in your toolkit for remote partner or client management?

Documented goals and objectives, wide open lines of communication (about anything and everything), bias towards asynchronous communication, and an atmosphere of empowerment and trust. I find that people rarely talk about trust, but it's the most important aspect.

You don't walk into an upscale restaurant and ask to watch as you food is prepared — you trust the experts to get it right, and you graciously work to course correct if it misses the mark. Trust is essential in a healthy remote engagement, and it's worth putting in the effort to get to know someone before diving into a project.

At GitLab, documenting everything is a part of our Efficiency value. We have a handbook with over 3,000 pages to ensure that culture isn't lost and all answered questions are written down as to benefit others.

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