guidedinsights

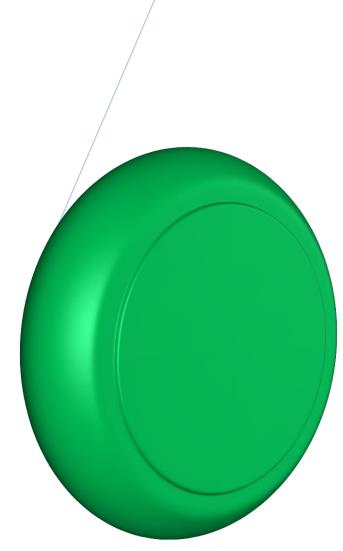*breakthrough conversations
for bottom-line results*

Essential Skills for Today's Hybrid Leaders

Guided Insights

Summary and recommendations based on interviews with senior HR leaders, Learning and Development managers, facilitated workshops and online forums

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Contents

Background and context

Leading a hybrid team presents unique challenges over leading co-located or all-virtual teams. That was the premise I wanted to validate before revamping my current learning and coaching programs on virtual leadership, which I first created more than a decade before COVID.

I interviewed more than a dozen senior leaders in depth to hear what they saw as the special challenges today's hybrid leaders face and the skills and behaviors most needed to successfully address them. In addition, I interviewed more than 10 learning and development managers to better understand what hybrid leadership training they see as most crucial, and what they feel are the best ways to cultivate these skills. I also opened an online forum for about 20 or so others to weigh in on these topics.

Bottom line: While most organizations understand that successfully leading hybrid organizations calls for special skills, behaviors, mindsets and capabilities, relatively few have introduced learning programs to close the gaps, for many reasons. This summary report explains some of them.

This is a synthesis of what I learned in my interviews and from responses posted in my online forum, and also draws from articles, social posts, and ongoing conversations I've had with colleagues and clients who are asking some of the same questions.

Leading in a hybrid world takes special skills

> *"Leading hybrid teams through a fundamental shift in how, when and where employees did their jobs proved to be a tremendous challenge. You had a style of communication that needed to change overnight as people worked flexibly…and you had to re-think recruiting processes: hiring a worker that you might never meet in person. You had to accept that a fully remote team would naturally build its own workplace culture. Alongside that, everything sped up and intensified: you had less time to learn or make mistakes. It became a recipe for stress, overwork and burnout." (BBC Worklife)*

Working from home at least part-time is five times more common today than 2019, and it's likely to stay that way, according to most workplace research. And yet, despite the prevalence of hybrid work, relatively few managers have the skills they need to lead effectively in a work environment that's inherently imbalanced. Many may have lacked some important leadership skills to begin with – like empathy, the ability to create psychological safety, responsive coaching, trustworthiness, and the ability to communicate clearly and credibly. In a world where managers and their team members work apart most of the time, these skills have taken on new importance.

Just because managers grabbed the wheel in a time of sudden crisis during COVID *doesn't* mean that:

- Leading an all-virtual workforce is the same as hybrid
- Operating in crisis mode for three years means that leaders have necessarily developed the skills and capabilities needed to operate successfully in a permanently hybrid world
- They did a good job
- They were effective managers in a pre-pandemic world

> *When the pandemic hit, middle managers' jobs became harder: they not only had to deal with the emotional impact on their teams – they also had to find ways of enabling remote work virtually overnight. The processes in which people had communicated, coordinated and shared information in the workplace for decades were suddenly overhauled, and left for managers to figure out. (BBC Worklife)*

The manager's role is simply overwhelming

Moving to a hybrid environment is just one challenge today's managers face. Add to that a confluence of factors conspiring to make their jobs that much harder. Among them:

- Staving off attrition
- Stiff competition for talent
- The shifting social contract between employers and employees
- The need to revamp work processes and performance metrics
- The need to maintain equity and fairness
- The imperative to create a sense of psychological safety
- Increasing demands for learning and growth opportunities
- Mastering technology that enables new ways of working
- …and more

> *"Hybrid was chosen, but it was much easier to say than to do; it came down to middle managers to solve challenges on a daily basis. Part of the problem…was that employee expectations became radically different. People fundamentally changed following the pandemic. Employees wanted more in terms of salary, flexibility and freedom to work how they want. They became more stressed and sensitive to company changes."*

> *"… issues like the ongoing hiring crisis, the difficulties in leading hybrid teams and dealing with flexible working requests have created unsolvable problems for managers to fix; bereft of organizational support, they instead face the wrath of junior employees. We've never been in a scenario where it's so difficult to hire and retain workers, while increasing employee demands only adds to the challenge. Most organizations aren't equipped in their policies and procedures to deal with these requests – let alone middle managers."*   (BBC Worklife)

The bandwidth issue

Even when managers acknowledge they need special skills to be effective in a hybrid world, many say they're just too busy fighting fires to clear much space for learning. Training is seen as a luxury they can't easily afford, especially if their senior leaders don't actively support training initiatives.

For most organizations we spoke with, learning and practicing new leadership skills, behaviors and habits will need to be delivered in relatively small doses, using a blending of real-time learning programs, experiential activities, simulations and cohort discussion groups, coaching and support, complemented by self-directed learning resources (articles, videos, journaling, sharing online, etc.)

Onsite, in-depth training lasting one or more days may be a viable option for those whose senior leaders value, encourage and enable such learning. In our experience, this is relatively rare today, unless the onsite training is tied to another event, such as an extended team meeting, conference or another planned event.

Regardless of the duration or venue, the kind of skills today's leaders need cannot realistically be developed by once-and-done training. Learning sessions for additional skill-building, practice and reflection spread over a period of several weeks to several months will be the most effective ways for leaders to learn, retain and apply new skills, especially if they have opportunities to form cohort learning groups.

It's not just about skills - attitudes, habits, mindsets and behaviors matter, too

How and where certain leadership skills, behaviors, attitudes and habits are best learned and practiced will vary with each organization, depending on its culture, senior leadership support, existing learning gaps, availability of relevant learning programs, access to coaching and support, number and location of leaders, and a host of other factors.

Another factor that will have a dramatic impact in determining which skills leaders most need to be successful in today's world: The rethinking of performance metrics, moving away from hours worked and time in the office to meaningful outputs and tangible outcomes. Few companies seem to have started the work of revamping performance metrics at an enterprise level, but most senior HR leaders I spoke with acknowledge the need to shift performance metrics and goals, which – assuming they're linked to learning goals – will have a profound impact on leadership skills training decisions.

> *"There previously weren't many courses on managing hybrid teams: knowing which conversations to have in terms of working in person, or knowing how to manage someone you'll never meet in real life. It's not easy: if you're a manager today compared to 2019, absolutely your job is more challenging." (BBC Worklife)*

Why cookie-cutter "best leadership practices" won't work

There is no such thing as "best leadership practices" that can be universally applied when it comes to leading in a hybrid world.

For one thing, most organizations don't have enough experience operating as a hybrid workforce to be able to legitimately boast of "best practices" that can work well for all organizations. For another, leadership practices need to reflect the values, beliefs and culture of their organizations. Trying to force-fit a set of leadership practices that work well for a Fortune 50 oil and gas company on a fast-growing high-tech company or a small regional nonprofit can be a costly exercise in futility.

> *"When the pandemic first hit, and everything turned online, managers believed that company culture and processes didn't need to change – we just needed*

online alternatives for everything. I think it's only now that businesses have accepted they need to adapt, rather than find quick fixes."

"Flexible working has deepened the issues that make the transition to management difficult: it requires more help, training and the redefining of what it means to be a successful manager." (BBC Worklife)

Making the case – assessing the cost, estimating the value

To make a business case for hybrid leadership skills development, organizations need to quantify the real cost of ineffective hybrid leadership, and the value of getting it right.

Consider the costs to an organization when…

- A leader relentlessly micromanages team members because they don't trust what they can't see
- Projects are routinely delayed when team members can't find needed documentation because they haven't created agreed-upon norms
- Employees head for the exits when managers haven't made them feel valued or appreciated
- Remote employees lose motivation when they are left out of the communication loop or excluded from plum projects
- A department must replace key team members who saw no way to progress their career
- New hires leave quickly in the absence of management support and few opportunities to learn

Consider the value an effective hybrid leader can bring to an organization when…

- Employees feel so trusted, engaged, challenged, motivated and appreciated that they have no thought of leaving for another company
- Their team collaborates and communicates effectively and easily, consistently delivering great work on time
- Employees routinely exceed performance expectations when their managers demonstrate genuine interest in their professional development and career growth
- Team members are so grateful to feel included, treated fairly and appreciated, that they refer a steady stream of talented friends and colleagues

With effective hybrid team leaders in place, organizations can achieve other bottom-line benefits like[1]:

- Reducing the heavy reliance on external recruiting and contracting to fill talent needs
- Minimizing or eliminating costly ramp-up time when fewer employees need to be replaced
- Increasing the likelihood of attracting needed talent when you become known as the "go-to" employer for people seeking meaningful learning and development opportunities
- Unlocking "trapped" workforce capacity by enabling and encouraging internal mobility

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[1] Thanks to Brian Heger, Global Head of Strategic Workforce and Talent for Bristol Meyers Squibb, who called out some of these benefits

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Assess critical skills gaps, and start there

No single learning program can cultivate all of the skills, behaviors, and habits today's hybrid leaders need in one fell swoop. Start with an assessment of today's most pressing leadership needs that can be best met by the right skills, behaviors and habits.

- Solicit perspectives from a representative set of managers from different levels of seniority, tenure, locations, departments and demographics
- Make sure to elicit perspectives of representative employees as well. This might be done by examining existing employee engagement surveys, conducting confidential interviews or focus groups, setting up an anonymous online forum, or a combination of methods
- Determine which leadership challenges or shortcomings are costing your organization and its employees the most, and where you can realize the greatest value if you get it right

Create a short list of priorities, by targeted segment, which can be acted on relatively quickly, and build a comprehensive learning program around it. Or begin with a comprehensive learning roadmap and choose a few programs to move ahead with first. *One caveat: The latter approach can be a protracted process, requiring extensive buy-in from multiple stakeholders before you can take any action.*

To get the ball rolling, consider a "greenhouse" approach, where you can introduce a multipronged learning program in one area of the business to pilot, solicit feedback, revise and roll out more widely.

Keep in mind that certain types or levels of leaders may need knowledge about one aspect of virtual leadership, proficiency in another, and mastery in another. By linking learning goals to targeted performance goals, learning programs can be targeted to a particular segment or type of leader, rather than a scattershot approach that assumes all leaders need the same skills, capabilities and behaviors in equal measures.[2] This makes the need to reconsider performance metrics that much more important.

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[2] BBC Worklife article links: Why middle managers are often cast as villains - BBC Worklife

How Flexibility Made Managers Miserable

Leadership skills, behaviors and habits most needed in today's hybrid world

Here are the leadership skills, knowledge, capabilities, behaviors, habits and mindsets most frequently cited by research participants. Some might fit into multiple categories. In most cases, I listed them in one category or another.

Foundational hybrid leadership skills

- Exploring the unprecedented confluence of challenges today's leaders face
- Why the move to hybrid is the "tipping point"
- Understanding why and how leading effective hybrid teams requires certain baseline knowledge and skills that are different from leading in an all-remote or co-located world
- Discovering the impact that effective hybrid leadership can have on leaders, teams and the entire organization, and what it costs to get it wrong

Empathy, trust and psychological safety

All are intertwined and especially important when leading a hybrid team, when some members may feel forgotten about, lesser than, misunderstood or ignored. All are significantly more challenging when team leaders and their members have few if any opportunities for real-time conversations, whether remote or in person.

Skills, behaviors and habits important to include:

- Emotional intelligence, including the ability to discern and discuss feelings, both in 1:1 conversations and as a team
- Maintaining social connections to build trust
- Active listening
- Creating a level playing field (*cross-reference Maintaining Equity*)
- Demonstrating curiosity - crafting and posting insightful questions
- Habits and behaviors that establish psychological safety, such as modeling candor and vulnerability, encouraging risk, establishing a sense of self-sufficiency and autonomy, seeing failures as teachable moments, making it okay to ask for help or surface issues and concerns
- Radical candor – providing clear feedback when it's most useful, seeking feedback
- Detecting disengagement, disenfranchisement or distrust – and making reparations
- Creating opportunities to build trust across the team

Galvanizing, mobilizing and motivating your hybrid team:

When teams have relatively few opportunities for same-time conversations, it can be difficult to detect when goals are misaligned, expectations are unclear, metrics are fuzzy, or priorities are vague. Likewise, it's more challenging to create and maintain a shared understanding of team goals and to provide the motivation and encouragement team members need to do their best work.

Skills, behaviors and habits important to include:

- Approaches for gaining alignment and create a shared understanding of team goals, priorities, accountabilities, metrics and measurements
- Facilitating team conversations to create shared principles and norms and agree on implications and actions
- Managing conflicts and misunderstandings
- Special considerations for hybrid teams – best strategies for including all voices, creating a sense of perceived fairness and equity, making the best use of available team communication channels

Maintaining equity

In an all-virtual world, many people reported feeling like they were at parity with their colleagues, with no one having an unfair advantage over another, and everyone having a voice at the table. With the move to hybrid, today's leaders need to pay special attention to maintaining equity, beyond just work location. They also need to consider how to create a more equitable workplace for all employees, regardless of gender, race, age, religion, national culture, native language, physical abilities, college affiliation, and more.

Skills, behaviors and habits important to include:

- Finding ways to make sure all voices are heard
- Providing equitable opportunities for advancement, visibility and professional development
- Understanding your organization's own DEI resources, including employee resource groups
- The importance of assigning the right mentors
- Creating a sense of belonging, inclusion
- Instilling an awareness of and finding ways to mitigate unconscious bias on a personal level, across the team and across the organization

Communications skills

The need for exemplary leadership communications skills has never been more important in a world where misunderstandings and confusion can be harder to detect and rectify. Today's leaders need to discern when communications are most needed, the right messaging and the best methods. Both written and spoken communications need to be especially clear, concise and unambiguous.

In addition to cultivating their own communications skills and practices, hybrid leaders also need to guide the team in agreeing on consistent communications principles, practices and norms across the team.

Skills, behaviors and habits important to include:

- Active listening, hearing what's not being said *(cross-reference empathy and trust)*
- Being explicit, clear and concise in writing and speaking
- Establishing credibility, building trust while speaking and presenting
- Establishing the optimum cadence, frequency of 1:1 and team communications
- Managing the team communications mix – using communication channels consistently and intentionally; knowing how, where and when to leverage asynchronous communications for better, easier and faster collaboration

Creating opportunities for professional development and career progression

Meaningful opportunities for professional growth, learning and career advancement are important for most employees, and especially so for younger employees and new hires, who cite this as a top criteria for choosing employers they want to work for and stay with.

Skills, behaviors and habits important to include:

- Establishing a sense of self-sufficiency, autonomy and agency for all team members
- Proactively seeking out and suggesting opportunities for learning and growth
- Providing support, reinforcement and feedback for employees learning new skills
- Encouraging rotations of roles within the team, shadowing people in other teams, and other means for on-the-job training and informal learning
- Making the best use of 1:1 meetings to include professional growth discussions
- Connect employees with people, resources outside of the immediate team, both internal and external

Coaching and mentoring

Leadership coaching can take many forms – encouraging, supporting, emboldening, suggesting and providing feedback for employees in their current role. Mentoring, which is often provided by someone outside of an employee's own work group, tends to focus on professional development, personal growth and career advancement.

Today's managers often need to take dual roles, both of which can be more challenging in a hybrid world, given that the line of sight between employee and manager is often missing. At a time when many employees feel isolated and invisible, the need for coaching and mentoring has never been more important, especially for newer employees.

Skills, behaviors and habits important to include:

- The importance of delegation - Approaches and tips for enabling and encouraging employees to become self-sufficient, working autonomously
- Agreeing on accountabilities and other measurements for individuals and teams, checking on progress, helping employees think through solutions
- Methods to help coax and encourage the best work from everyone
- Providing feedback and direction that's clear, actionable and meaningful
- Helping employees to set boundaries

Managing performance from afar

Managing performance can encompass a range of skills, activities, proficiencies and behaviors, some of which may be captured in other topic areas as well.

Skills, behaviors and habits important to include:

- Establishing agreed-upon goals, metrics, deliverables and related timing
- Preparing for and initiating difficult conversations, especially regarding job performance
- Establishing methods and cadence for status reporting
- Recognizing and rewarding individual and team achievements
- Celebrating important milestones
- Designing and delivering meaningful performance feedback, formally and informally

Designing and facilitating inclusive, productive meetings

Designing and facilitating hybrid meetings that enable and encourage active participation is a difficult task for even seasoned facilitators. Hybrid leaders need tips, approaches, examples, and resources for designing and facilitating conversations that enable all voices to be heard and help make people feel

appreciated, engaged and focused. These conversations may take place remotely, in person, or a blend of the two, and may include any number of people, both internal and external.

Use cases might include the following kind of meetings or conversations - remote, hybrid or onsite:

- Regular team meetings, 1:1 check-ins
- Special-purpose team meetings, such as making a complex decisions, organizing work flow, brainstorming innovative ideas, or agreeing on shared principles and team norms
- Gatherings to build relationships and/or do collaborative work – onsite, virtual or hybrid
- Stakeholder analysis discussions
- Project kick-offs, planning, check-ins or after-action reviews
- Group learning activities

Personal effectiveness and productivity – healthy hybrid habits

Leaders and their teams work best when they respect each other's boundaries and time and have reasonable expectations about what can be accomplished, given the time, resources and other priorities. Hybrid teams require an extraordinary level of organizational and time management skills, given that so much of their work must be done asynchronously. Hybrid leaders to model the desired behavior for healthy hybrid habits to take hold across the team

Skills, behaviors and habits important to include:

- Setting, abiding by boundaries
- Responsiveness to requests
- Meeting scheduling, RSVP'ing to meeting invitations, calendar management
- Time management
- Organization of files, shared documents
- Signaling presence

Mastering the use of technology for team collaboration and communication

This can encompass a range of skills, activities, proficiencies and behaviors. Some of these may be captured in other topic areas as well.

Skills, behaviors and habits important to include:

- Understanding which collaboration/communication tools and applications are best used when, across the team
- Ensuring that all team members have the confidence and competence to use shared tools and apps, including the ability to access training
- Ensuring that all team members and onsite meeting rooms have the systems and equipment to create an equitable meeting experience

- Understanding how asynch communications methods and tools can improve collaboration and reduce project time
- Establishing shared team norms and protocols governing the use of shared tools
- Knowing what investments are essential for creating a level playing field

Skills development delivery and support methods, resources and tools

While some of these skills, capabilities and behaviors can be learned, mindsets and attitudes tend to change more slowly, over time. These delivery and support methods can be combined in an infinite number of ways. In some cases, sequences will be important. For example, the topic of Empathy, Trust-building, Emotional Intelligence and Psychological Safety may make more sense coming prior to a module on Coaching and Mentoring.

Here are the delivery and support methods and choices research participants mentioned when asked how their hybrid leaders might learn and apply new skills and behaviors most successfully:

- Real-time instructor-led virtual delivery – Custom development of multiple modules, timing and sequence TBD. *Ideally, any module can be standalone, and there are no prerequisites for any module, apart from the foundational module. The combination, content and timing of modules will depend on client needs.*
- Real-time in-person classroom delivery – Custom development of onsite training - from ½-day to 3-4 days
- Outside trainers deliver off-the-shelf courses in house, virtually or in person
- Leaders attend training sessions from external trainers, either as part of a company cohort or as mixed group from different organizations – either virtually or onsite, customizable or off the shelf
- Facilitated peer roundtables
- Peer support and coaching – via online portal, in scheduled meeting, or any variation
- Coaching, support from mentors and/or from training facilitators
- Video recordings – downloadable just in time – customized or off-the-shelf
- Role-plays, other simulations
- Job aids – including reference guides, checklists and templates
- Book clubs and discussions

How any or all of these options may work best will vary with each organization, based on variables such as:

- Level of senior leadership support
- Priority skills/topics
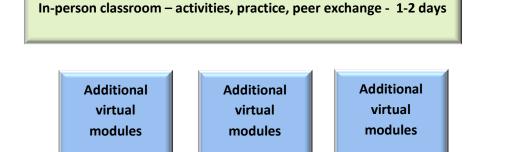- Fit with existing leadership skills programs

- Time required, both duration of learning program and elapsed time
- Number, location and timezones of participating leaders
- Preferred methods of learning based on past experiences, by leader segment
- Ability of in-house learning and development staff to design and/or deliver needed programs
- Preference to "build or buy"
- Level of customization needed
- Desire for intact teams or "mixed" teams
- Size of budget

One example:

Virtual modules and in-person classroom activities can be combined, or the entire leadership skills development program can comprise a series of virtual modules. Regardless of the program design, opportunities for peer coaching and support and easily-accessible online tools, templates and resources should be embedded throughout.

| Foundational skills – virtual module - @2hrs |

| In-person classroom – activities, practice, peer exchange - 1-2 days |

| Additional virtual modules | Additional virtual modules | Additional virtual modules |

| Peer coaching, learning exchange |

| Job aids, just-in-time resources, team portal |

Summary

In an ideal world, senior leadership would re-examine how, where, when and whether work needs to be done in light of a hybrid workplace, and learning programs would be designed to enable and support the performance of that work. In reality, few organizations we know of have taken those steps at an enterprise level, and may not any time soon. Some may see the hybrid workplace as temporary, while others may be too daunted by the prospect.

In any event, given today's reality, organizations need to ask their leaders how they can better support them as they navigate their way through a changing workplace. The ability to learn and practice new leadership skills will likely be high on their lists, as long as they believe they have the support of senior leadership to be successful.

Nancy Settle-Murphy is President of Guided Insights, a consulting firm that works with distributed organizations that need to get more done, in less time and with less friction, with better results and greater engagement and retention. Working with hybrid team leaders and their members has been our focus since 2001.