

JAMES M. CITRIN
DARLEEN DEROSA

LEADING

PRACTICAL LESSONS
FOR VIRTUAL SUCCESS

AT A DISTANCE

WILEY

Praise for *Leading at a Distance*

“We’re living in an unprecedented time that requires a new leadership at every level. Whether you’re running a company or a country, there is no playbook for how to engage people and drive meaningful action. But, through work like Leading at a Distance, we can learn from each other and find new ways of working, living, and leading.”

Hans Vestberg,
Chairman and CEO Verizon

“Remote work is here to stay; now comes the hard work of making it sustainable and inclusive. Leading at a Distance offers a roadmap. Jim and Darleen – both experts in their own right – cull timely research and insights from a who’s-who of business leaders into a compact and actionable guide that you’ll turn to again and again.”

Rachel Thomas,
CEO, LeanIn.Org

“Leading at a Distance is remarkably timely, a much-needed tool for any business leader in a post-COVID world. You’d be foolish not to read this book. Citrin and DeRosa not only help adapt your organization to successful distance work. They also offer first aid to the crumbling corporate culture in the aftermath of this global pandemic.”

Martin Lindstrom,
New York Times best-selling author,
Buyology and *The Ministry of Common Sense*

“The COVID-19 pandemic changed the way we work . . . maybe permanently. Leading at a Distance provides helpful insight on how to stay connected, build trust, coach teams, and drive talent innovation in a virtual world.”

Carol Tome,
CEO, UPS

“In Leading at a Distance Jim Citrin and Darleen DeRosa offer practical and cutting-edge leadership thinking for the new digital world accelerated by the global pandemic. This book is a must-read for sitting CEOs and leadership teams who will find the relevant tools to manage in an increasingly virtual environment.”

Dambisa Moyo,
Global Economist; author,
How Boards Work and *How the West Was Lost*

“It’s always a challenge for leaders to stay nimble as technology upends the old way of doing business, and the era we’re living in is no different. But they’ll find lots of great advice in Citrin and DeRosa’s timely new book – a primer for how to lead in a flexible and dynamic work environment.”

David Solomon,
CEO, Goldman Sachs

“As virtual work is here to stay, Leading at a Distance should be required reading for us all. Illuminating the pitfalls of virtual work, Citrin and DeRosa nonetheless show us a path to navigating work at a distance with both enjoyment and success.”

Betsy Bradley,
President, Vassar College

“Virtual, or remote, leadership is a timely topic. Fortunately for us, authors Citrin and DeRosa began their research 15 years earlier, and their wisdom will remain with us for decades to come.”

Satya Nadella,
CEO, Microsoft

“From employee onboarding and ongoing engagement, to reimagining company processes and reinforcing culture, Leading at a Distance offers timely insights and tools for leaders at all levels to help redefine what it means to connect and lead in a virtual or hybrid workplace. A must-read leadership guide for navigating this new paradigm to cultivate stronger teams and deliver greater results in these new workplace environments.”

Gail Boudreaux,
President and CEO, Anthem

“Leading at a Distance could not be more timely to help organizations, leaders, and employees thrive in today’s remote work environment. Perhaps more importantly, this book, with its deep research basis and compelling insights brought to life with vivid examples, will become a timeless resource as all of our relationships with work will continue to meaningfully change.”

John Donahoe,
CEO, Nike

“Many leaders have adjusted well to a virtual world but on the basis of tweaking approaches that worked in a physical one. Leading at a Distance flips that paradigm, starting with remote as the standard and designing everything from communication strategy to onboarding to running effective meetings with a virtual-first mindset. Citrin and DeRosa’s insights are both critical now and sure to have lasting value in a post-pandemic world.”

Rich Lesser,
CEO, BCG

“Human capital is the lifeline of every organization, and among the most valued assets in corporate America. Now more than ever, keeping talent motivated and engaged is a critical key to success. In Leading at a Distance, James Citrin and Darleen DeRosa give leaders the tools to effectively inspire their teams during the pandemic and

beyond. This book brings excellent best practices for corporations looking to thrive in a virtual world.”

Melody Hobson,
Co-CEO and President, Ariel Investments

“Jim Citrin and Darleen DeRosa know more great leaders than any combination of authors I have ever met and Leading at a Distance combines the wisdom they have accumulated over the years with their incredible learning in the past year. Leading at a Distance will be a guidebook for leaders long after today’s crisis. I am going to recommend it to every leader I know!”

Marshall Goldsmith, top-rated executive coach
in the world for over a decade and #1
New York Times best-selling author,
Triggers and *What Got You Here Won’t Get You There*

“Leading at a Distance is an essential guide to the many ways in which the year of COVID will transform the way we work.”

Mark Thompson,
Former CEO, *New York Times*; author,
Enough Said: What’s Gone Wrong with the Language of Politics

“In Leading at a Distance, Jim Citrin and Darleen DeRosa share their key learnings for how the most successful organizations balance the benefits of both in-person and virtual work environments to keep employees engaged and productive. Their insights and leadership lessons from top business leaders could not be more timely.”

Adam Silver,
Commissioner, NBA

“Citrin’s passion for leadership and DeRosa’s knowledge of virtual teams results in a powerful combination of practical tips for operating in a future that will no doubt feature more remote work. Rather than debate how much more remote work there will be, we should all adopt the principles outlined in this how-to guide for Leading at a Distance.”

Carlos Rodriguez,
CEO, ADP

“Leading at a Distance provides unmatched access to the real, lived experiences of business leaders as they deal with profound changes to professional life. In expert fashion, Citrin and DeRosa crystallize new responsibilities and possibilities for virtual leadership.”

Toni Petersson,
CEO, Oatly

“A brilliantly timed book! Jim Citrin and Darleen DeRosa have produced an unmatched playbook for leading in the virtual workplace. Leading at a Distance offers tactical advice that is easy to digest and fun to read. It is written with the confidence of two leading experts in the field and filled with examples that make the content both credible and relatable. As businesses move from virtual to a hybrid model in the post-COVID-19 world, Citrin and DeRosa offer the go-to guide for how to be successful. This book should be required reading for every CEO and executive.”

Jared Cohen,
CEO, Jigsaw, Google; *New York Times*
best-selling author, *The New Digital Age:
Transforming Nations, Businesses, and Our Lives*

“Leading at a Distance is the essential, very practical, immediately useful manual all of us need to get better at leading in this new, permanently changed environment. The world will be a better place thanks to Citrin and DeRosa’s new book.”

Hubert Joly, Former Chairman and CEO,
Best Buy; author, *The Heart of Business:
Leadership Principles for the Next Era of Capitalism*

“Without a doubt, technology has enabled leaders to meaningfully connect and manage throughout the pandemic. As working from anywhere is here to stay, Leading at a Distance is a timely guide to tackle how to navigate this new normal while fostering team growth, connectivity, and inclusivity – all in service of driving strong results. Success in virtual leadership requires leaders to treat the environment as an

opportunity and this book provides insights, applications and tools to do just that.”

Mary Dillon,
CEO, Ulta Beauty

“Leading at a Distance is an essential read for every leader navigating today’s rapidly changing work environment. Jim and Darleen draw on their deep expertise to provide invaluable insights on the elements of successful virtual leadership. Their book is a timely and necessary toolkit for leaders working to build trust, collaboration, and productivity as we enter the future of work.”

Dan Schulman,
CEO, PayPal

“Leading at a Distance could not have come at a better time. Becoming adept at virtual meetings has become the only way to survive throughout 2020. Citrin and DeRosa offer ways to ensure that leaders not only survive but thrive in the world of virtual work. The book offers ways to excel at leading in a virtual work environment and provides rich examples of how to motivate and inspire a remote workforce.”

Gail McGovern,
President and CEO,
American Red Cross

“Leading effectively, already tough in today’s uncertain and ambiguous context, faces compounding challenges in the virtual setting. Drawing from fresh practices innovated by corporations and startups to decades of research on managing and teaming, Leading at a Distance gives us an actionable blueprint for success in virtual leadership. One of the toughest aspects to leading is closing the perception, knowledge, and emotional distance between leaders and those whom they lead through communications and feedback. This book amps up our superpowers in doing that, even when we are leading at a distance.”

Sanyin Siang,
Thinkers50 #1 Coach and
Mentor; Professor, Duke University

“The future of work will require more from leaders. Success will be driven by those who build trust, equity, and a work experience that matches the values of their company and their employees. Leading at a Distance is a powerful tool for success in this new world.”

Jamie Iannone,
CEO, eBay

“Virtual working, in multiple different forms, is here to stay. Leading at a Distance is not just an excellent playbook for how to get the most out of this new sport. It also addresses the key question of how to simultaneously build the social capital that organisations and teams need to win in the COVID post season.”

Alan Jope,
CEO, Unilever

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Published by John Wiley & Sons, Inc., Hoboken, New Jersey.

Published simultaneously in Canada.

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Library of Congress Cataloging-in-Publication Data is Available:

ISBN 9781119782445 (Hardcover)

ISBN 9781119782469 (ePDF)

ISBN 9781119782452 (ePub)

Cover Design: Wiley

10 9 8 7 6 5 4 3 2 1

To my beloved Lindsay

—J.C.

To Joe, Drew, and Natalie, with love

—D.D.

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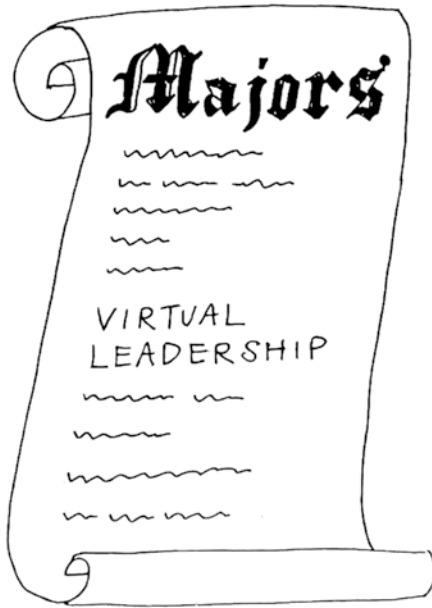
Preface: “The Most Obscure PhD in History”: The Story Behind This Book

“That has to be the single most obscure PhD in history.”

Those were my first words to Darleen DeRosa, when I was introduced to her in January of 2020. We were in the Stamford, Connecticut, office of Spencer Stuart, one of the world’s leading global leadership advisory and executive search firms. For 27 years I’ve had the pleasure of working at Spencer Stuart, the worldwide leader in CEO, board, and C-suite executive recruiting and leadership, organizational, and culture advisory services, channeling my passion of connecting with and building the very best talent. Darleen had just been recruited as a core member of our Leadership Advisory Services Practice. For the prior dozen years, Darleen led a highly specialized advisory firm, OnPoint Consulting, after having served as an executive director in the assessment practice of another leading firm.

Darleen explained that she had long been passionate about the topic of virtual teams as a part of her broader interest in leadership development and succession planning. In fact, when she was doing her doctoral work in social/organizational psychology at Temple University, her subspecialty was how to build, manage, optimize, and create cultures for virtual teams.

“I think that virtual leadership will become increasingly important as remote work becomes even more prevalent in the



future,” Darleen said. “Right now, about 10% of employees in the U.S. work remotely, and projections suggest that by 2025 that number could *double* to 20%!”

Okay, that is all fine and well, I thought at the time. But the issue didn’t feel that relevant to me personally.

How the world changed! Only a couple of months later, as COVID-19 became a global pandemic, Darleen’s expertise rocketed from the periphery to the epicenter of our world. In late February 2020, in a staff meeting, Darleen gave a training session on virtual leadership, including some critical basics, such as how to facilitate and lead a virtual meeting. Immediately, Darleen became a rock star and in heavy demand by our clients around the world. Within weeks, she was a keen differentiator as we were advising boards and senior executives in real time as they were navigating some of the most critical leadership moments of their careers.

Directly applying lessons from Darleen, we were able to shift much of our work at Spencer Stuart and seamlessly advise clients on virtual leadership – by then a ubiquitous challenge. Thanks to that, we were able to keep our business operating, and move our CEO, board director, C-suite executive searches, and succession planning assignments forward effectively during the early and uncertain pandemic days of March and April 2020.

That summer, knowing that I have long been a student of leadership, CEO succession, and executive success, Darleen called and asked if I would co-author a book on virtual leadership. She shared that a senior editor at John Wiley & Sons had called suggesting that she update her 2010 book, *Virtual Success: A Practical Guide for Working and Leading from a Distance*.

I was thrilled. From that time on, we dove in together to create *Leading at a Distance*. The process of researching and writing the book has been a fun and incredibly helpful learning journey. I've applied the lessons on staying connected, building trust, coaching, and innovating with our Spencer Stuart CEO Practice team, composed of Melissa Stone, Hannah Ford, Ashley Zaslav, Karen Steinegger, and Maddi Conlin. That has been the very best part of working remotely. I feel we are all more in synch and effective than ever, although I really miss our team dinners. And similarly, I was able to lead a wide variety of CEO searches and succession projects, from eBay to Virgin Galactic, completely virtually, by following all the practices outlined in this book.

Both Darleen and I hope that you enjoy this book – and more importantly, that you apply it to accelerate your own professional success and the achievements and satisfaction of your teams and organizations.

Jim Citrin, November 2020

During college at Holy Cross, I always thought that I would become a clinical psychologist. After college, I worked in a clinical setting at Yale University School of Medicine for several years and realized that I could apply the same practices in consulting, where I could blend two topics that I enjoyed – people and business. This led me to pursue a PhD in organizational psychology.

At that time, in the early 2000s, companies like AT&T and others began using virtual collaboration. I told my doctoral advisor that I wondered whether teams that worked virtually could be as effective as co-located teams. This wasn't just a theoretical question: I wanted to study *real* teams inside *real* companies. While I was conducting research for my PhD, I asked consulting firms to let me survey their clients. Eventually Steve Krupp at Right Management Consultants brought me on as an intern to conduct a global study. This internship quickly turned into a full-time consulting job, and that research became one of the first applied studies on this topic.

My fascination with virtual work continued. At OnPoint Consulting, the executive succession and leadership development firm I launched in 2008, we conducted three more global studies on virtual teams, which were by then becoming increasingly common. We strove to identify what differentiated the best virtual leaders and teams from the rest. Over the next 12-plus years, we consulted with numerous clients and helped them better equip their virtual leaders for success. After publishing my first book on this topic, *Virtual Success: A Practical Guide for Working and Leading from a Distance* (with Rick Lepsinger), we applied our experience to craft an array of leadership development programs for virtual leaders – which we eventually delivered in a “virtual” classroom.

When I joined Spencer Stuart in January 2020 to continue my emphasis on CEO succession, I thought my passion for virtual leadership would be put on hold. Little did I know that just two months later, we would face a global crisis where organizations had to pivot quickly to a virtual setting. On our firm's website,

we published an article, “Leading from a Distance: 5 Lessons for Virtual Teaming,” and clients began asking for us to help them learn to operate in this new environment. Jim began sharing my articles on LinkedIn and inviting me to meetings with his clients to talk about their challenges working in this new normal.

When Wiley called to ask me to write a new book, my first inclination was to say no, given how busy I was with client work and the kids at home. However, I realized that this was the exact moment when leaders and companies needed these insights more than ever. What Jim referred to as “the most obscure PhD” was highly relevant to a broader audience. I also realized that Jim’s passion for leadership, coupled with his interest in the topic (and the fact that he has written seven books), made him a great co-author. Whenever we had a question, Jim called CEOs or other top leaders to get an insider’s perspective. A fun example of this is when we were reading about new advancements in Microsoft Teams to combat video fatigue, Jim contacted Satya Nadella and Kathleen Hogan, CEO and CHRO of Microsoft, respectively, who put us in direct touch with Jeff Teper, the leader of the product, design, and engineering teams for Microsoft 365, which includes Microsoft Teams.

Working on the book virtually with our superb internal project team (Ashley Zaslav, Hannah Ford, and Will Dowling) has also been an opportunity for us to test out new approaches. We navigated learning how to leverage different technologies and channel flexibility. Some of us took video calls from our kids’ playroom or a hospital room with a relative; one of us sent notes while out at sea on a boat in Bermuda, all the while learning more about each other as people and employees.

What I love most about this book is that it integrates more than 15 years of research and experience in a practical way that anyone can apply. We hope that you enjoy this labor of love.

Darleen DeRosa, November 2020

Introduction: The Virtual Revolution

At the start, we were all operating on adrenaline.

When the COVID-19 global pandemic broke in early 2020, millions of organizations and hundreds of millions of employees shifted on a dime to working remotely. A can-do spirit set in individually and collectively, fueled by the once-in-a-generation sense of shared humanity, driving people around the world to adapt and perform at unimaginably high levels of productivity. Employee engagement scores increased as CEOs and corporate leaders stepped up and communicated with much greater frequency, transparency, and authenticity than they had felt appropriate before the crisis set in. And a great many office workers, powered by Zoom, Teams, WebEx, and BlueJeans, quickly found joys in working from home and eliminating the grind of the daily commute and business travel.

A year later, much of this novelty had washed away.

This is not only about Zoom burnout. Fear and uncertainty about the virus and the resulting global economic collapse, concerns about the well-being of loved ones, and job insecurity were further exacerbated by the many other afflictions of *Annus Horribilis* 2020. The all-too-well-known list includes historic levels of political polarization, nationwide protests over racial injustice ignited by the killing of George Floyd, and record-destructive wildfires throughout the West Coast of the United States, just to