HOW-TO DRAFT:
SUPPORT AND COACHING TECHNIQUES FOR REMOTE GROUPS

This doc was designed to travel. Please feel free to share this around with other progressive campaigners. You can download this (look under File menu top left) in several formats or link to it / embed it on a web page.

Disclaimer / request for your help

This is a work in progress that is meant to evolve over time with input from campaigners. At the moment, the tips and ideas here reflect the voices of the contributors/reviewers listed below. We are always looking to add more voices of campaigners that have knowledge and experience on this topic. If this is you, please contact us here: blueprintsfc@gmail.com.

Summary

As digital group-work tools make it easier to coordinate teams at a distance, campaigns that access them can now scale rapidly and build collective impact through distributed organizing (see our guide on this for more). One of the challenges of this kind of organizing is that the lack of face time and direct human contact can lead to engagement and morale drop off. Several groups that have sparked remote teams and chapters have now developed ways to support these groups at a distance and maintain a sense of purpose and togetherness with their supporters no matter where they are.

Who's doing it?

The groups innovating here are ones that have invested deeply in a distributed organizing model. Pioneered by early adopters like 350.org and Hollaback!, remote support systems were refined during the Bernie campaign's extensive volunteer mobilization and are now being replicated by a host of newer distributed movements including Indivisible, ACLU's People Power program and Team Internet fighting for net neutrality.

Impact/ Why do this?

To start with, the benefits of scale and impact that come from a network of remote supporter team/groups is covered in our distributed organizing guide here.

If your group is already on board with a distributed organizing approach, then sooner or later you will need to refine your coaching and support practices in order to:

- Maintain remote supporter enthusiasm and commitment
- Keep volunteers and teams throughout your network aligned on overall goals and milestones
- Build movement energy that can only be fed by human interactions

When this might not work for you

As with distributed organizing in general, it is a lot harder (if not impossible) to implement many of these practices without basic access to online tools and platforms.

A second barrier to consider is digital security and privacy. Many of the free and affordable tools used to coordinate remote group work are vulnerable to surveillance. Using secure alternatives is sometimes (but not always) possible and adds friction to the process, which needs to be planned for if your digital risk assessment shows a need to heavy encryption and identity protections.

What this requires (people, resources, etc.)

Digital platforms for group work and meetings that are accessible and user-friendly

This can include:

- Webconferencing software (like zoom or maestro conference)
- Collaborative document software (like google docs)
- Group chat software (like slack)
- Direct chat software (like Whatsapp)

Dedicated staff or volunteer support teams

Some core people in your central organizing group will need to carve out time and make themselves regularly available to lead calls and answer questions coming in from remote groups/supporters.

Team Internet, for example, has a dedicated team of volunteers whose sole purpose is to support other volunteers who have taken on the organizing and hosting of events.

An attitude of trust and support with regards to volunteer supporters vs. a tendency to micromanage

This basic posture will go far towards building leadership and autonomy within remote groups and will reduce the demands on central staff.

Setup steps/ stages

Process design

Choose a process for how you will create and manage teams. Team Internet, for example based their model off of of Rules for Revolutionaries, Becky Bond and Zack Exley's model deployed during the [Bernie Sanders primary race](). However, you can also feel free to design your own process to suit your goals and to respect your resource limits. This design process essentially comes down to visualizing the supporter path from initial outreach, through sign on, basic training/orientation and then regular supervision/coaching.

Questions to ask yourself:

- Do you have the tools and process set up for each step of the way?
- How are you tracking supporter activity?
- How often do you plan to round up supporters with a group talk?
- What triggers the need for an individual check-in?

Setting up support team(s)

Make sure staff or volunteers are briefed and ready to deal with new teams/recruits.

Onboarding remote teams

This is a process in itself that needs to be thought through in advance especially if large numbers of new recruits are going to be coming in.

To onboard new recruits, Team Internet had set up a system of 3 initial intake / orientation calls per week at the height of their campaigning phase. These calls would include general intros to the campaign and the larger issues of net neutrality that were at the heart of it, what is going on at this moment in time and introduction of the work teams. Since they were using Maestro Conference for these calls, new recruits could vote on which work team they would like to join right off the bat.

Activation through training/coaching

Training and coaching get new helpers started on the right path but are also important for making them feel welcomed to a new team and well-supported. Another benefit of a mandatory training process is that it makes commitment to the campaign's goals more official and weeds out people with only a passing interest in participation.

Here, Team Internet had set up a 1hr 15 min basic training session through webconference and then a 2 week coaching period during which time other volunteers would be assigned to help new recruits. For work teams with more complex tasks, new recruits watched a training video and then had to fill out some online forms (confidentiality etc.) before they got started.

Regular check-ins

Maintaining regular contact with remote teams is essential for morale and group energy.

Team Internet had scheduled regular weekly zoom meetings for supporters working on complex tasks for close to a year. These check-ins were used for relationship building, providing resources and support for questions. In doing so, they realized that the calls were important because their supporters were motivated not only by a desire to help but also because they wanted to connect with other likeminded people.

Best practices

Use the right platform

[Sho Konno](#) formerly with [Restless Development](#) observes that webconferencing platforms are only good for remote support and coaching exchanges that are mostly one way, such as highlighting case studies, running through things together (where supporters benefit from hearing your voice) and calling out volunteers to highlight their contributions.

For more interactive personal exchanges, Sho would use Whatsapp to set up one-on-one's with individual supporters and work out issues that way.

Icebreakers + energizers

To break up the stiffness and distance of webconference check-ins, icebreakers can be a good way to help participants get to know each other better. Examples include talking about really fun concerts you went to, places you would love to live in someday, draw how you're feeling and show it to the group or funny polls done live through webconference platforms. Essentially, whatever would be done to build energy in a face to face workshop should be adapted and tried in an online setting to make up for lack of physical contact.

On internal channels, like Slack, Alison from Team Internet underlines the importance of funny gifs as well as shout-outs and other forms of validation to help keep the personal team bonds going.

One-on-ones

Sometimes, a little time spent one on one with a remote supporter can go a long way. Alison from Team Internet says that the volunteers that have stayed on the longest are the ones she spent the most time with. These one-on-one calls or chats are spent truly listening with heart and mind open and hearing what volunteers are saying and addressing their concerns and expectations.

Volunteers taking over leadership and management of remote teams

Remote teams that get involved in the decisions around group management tend to stay more engaged and put more energy into group work. The key, according to Alison at Team Internet, is defining the autonomy remote team leaders can have within a centralized plan. In their experience, they had a lot of success allowing volunteer supporters design the training program and create materials to help train new recruits.

Tricky parts/ fixes

Different tech cultural preferences across geographic areas

Campaigners with experience running international distributed campaigns point out that that local partners will have different (divergent) preferences when it comes to digital communications platforms.

Sometimes this relates to technical difficulties (e.g. poor fixed-line broadband / good mobile broadband leading people to favour Whatsapp over anything that's PC-based).

But some many times it's a matter of familiarity. The Slack environment, for instance, might appear friendly and easy to use for someone who's technologically savvy, but others might find it incredibly challenging; even alienating.

So, instead of wallowing in frustration when people do not migrate en masse to Slack =) they have come to accept that they will have to continue deploying a range of communication channels to cater to different preferences / levels of familiarity to these

tools. Whilst at the same time nudging people into these more collaborative/interactive platforms.

Unpredictable tech and bandwidth

These can become big barriers since a lot of remote group management is facilitated online.

Sho Konno suggests finding alternate platforms for communication that are not synchronous, like Whatsapp, when online connections get spotty.

Further resources

Wirecutter's list of recommended webconferencing hardware and software:
https://thewirecutter.com/reviews/the-best-tech-and-apps-for-your-home-office/#web-meeting-and-call-recording-gear

Attribution

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