

21 Strategies to Effectively Work as a Field Based Team

Strategy	YES / NO	Order of Implementation	Implementation Target Date
As a team WE WILL adopt the following practices:			
Task Management			
1. Adopt key word utilization: ACT, DUE DATE, INFO			
2. Or we will Utilize “Delegate a Task” option with the team			
3. Use Voting Option			
4. Use and insist on a professional signature			
5. Agree to times of the day Email will be check (minimally) by each team member			
6. When to include me in an Email			
7. When NOT to include me in an Email			
Emails Practices			
8. Be selective in the volume of email we send.			
9. Insist on thoughtful “Reply to All.”			
10. Never include an action item to a “cc’ed” recipient.			
Calendar Management			
11. Agree to use Outlook as my primary calendar			
12. Agree to use the “invite” feature in Outlook to include the manager to all field events			
13. When sending an updated meeting request HIGHLIGHT the changed information, i.e. time, day, participants, location			
The Email Message			
14. When it’s necessary to send long emails			
<ul style="list-style-type: none"> • summarize at the beginning • announce number of items covered • identify what actions are requested • use bullets, short paragraphs, and white space 			
Voice Mail Messages			
15. We will set expectations for leaving good messages.			
<ul style="list-style-type: none"> • S State your name • I Impart the number of Items • M / P Make a statement or Pose a question • L List action needed • E End the call 			
Communications Expectations			
16. We agree on what materials we need in the field and who brings them.			
17. Agree that field day pre work is always sent via Email not verbally.			
18. The best way to reach me in an urgent situations is:			
19. The best way to reach me to convey information is:			
20. We will check voicemail (when)			
21. We agree to return info in the original format unless otherwise specified. Email = Email / Phone call = phone call/ Text = Text			