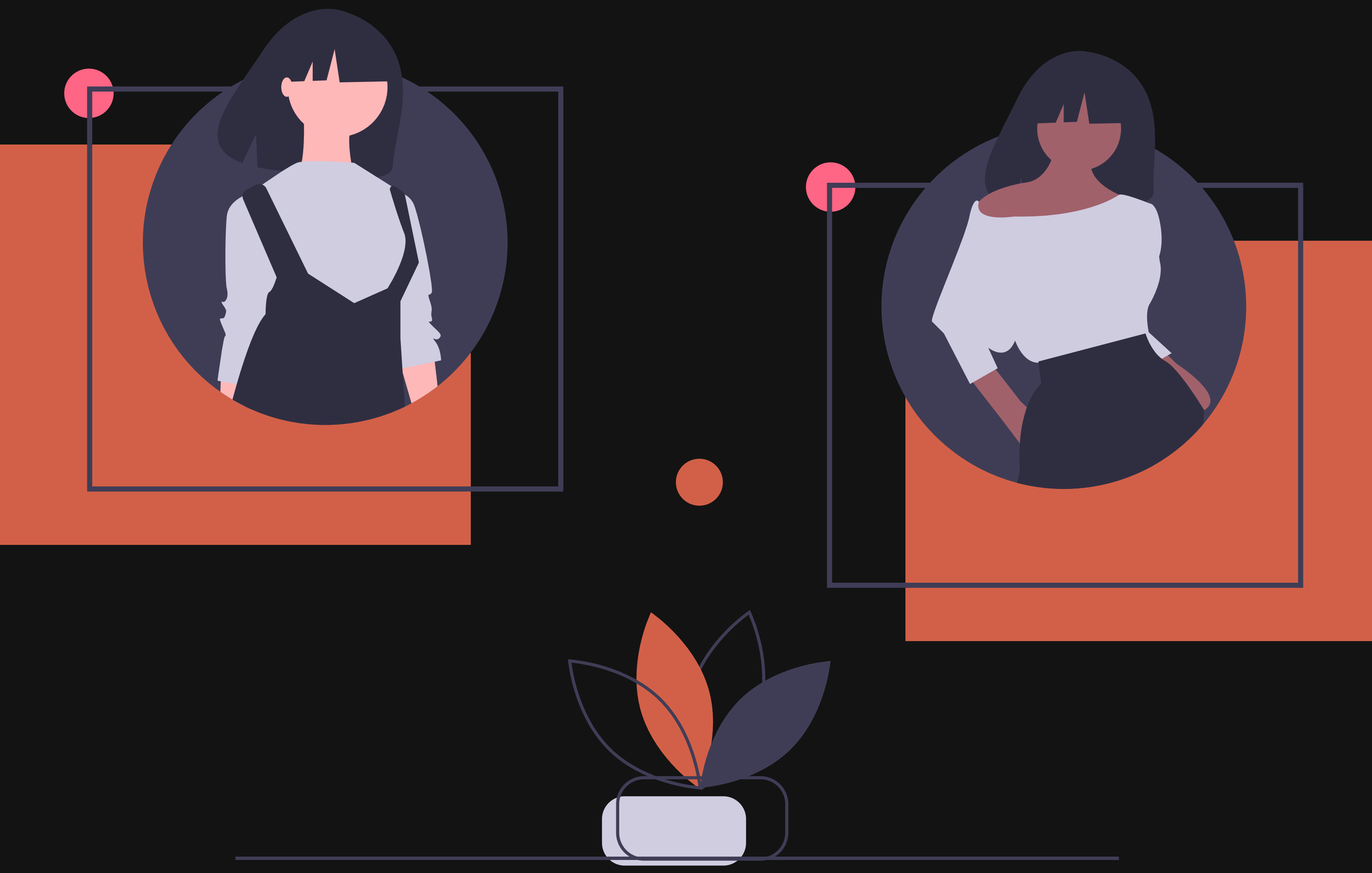
Distributed Playbook



COVID-19 is forcing tough choices about remote work. Even worse, these decisions are necessary, broadly impactful, and urgent. We appreciate everyone who is confronting this new reality, making courageous decisions without the benefit of experience or practice. We at Truss have both from eight years of working as a distributed office, and we want to share what we've learned in case it might help you through this transition.

Truss didn't initially envision itself as a fully remote company. The decision was prompted by unforeseen circumstances at the time the company was founded. In 2012, Everett Harper and Mark Ferlatte recruited Truss's third co-founder, Jennifer Leech. The trio was looking forward to launching Truss's first product, but there was one catch: Jennifer had to be out of the country for 18 months, traveling across 20 countries. The founders wondered if Truss could make this situation work.

We did, and we continue to make it work every day. Eight years later, Truss is a fully distributed company with nearly 100 employees working in more than 20 states. Deciding to be a distributed company continues to be one of our best business decisions. It has imposed unique challenges through every phase of growth, but we've evolved and iterated through many types of software infrastructure, communication platforms, video products, meeting protocols, and (notably) cultural norms to enable us to scale our company.

This playbook shares what we've learned about distributed work, and we hope it will help you make the best possible decisions for your organization during this difficult time. Not only can these practices support your employees to do their best work, but they may even help you interact more successfully with your clients and vendors as a distributed team. We are mindful that this is a stressful time for all, and we humbly offer this guide to help you navigate these tricky waters — and perhaps emerge a stronger, more resilient company.

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Two Notes Before We Begin

Infrastructure First

“Infrastructure first” is an unofficial Truss motto. To function successfully in a distributed setting, each team needs to have alignment around expectations, communications, and tools. These are the three building blocks of remote collaboration. Unfortunately, due to COVID-19, many of you will be building this infrastructure on the fly. This is sub-optimal, but we’re hoping that you can gain inspiration from the groundwork we’ve done, adapting our practices and tools to suit your organization’s needs.

Tools Last

Without establishing shared expectations and coherent communication frameworks, your tools will be instruments of chaos. What tooling you use doesn’t matter as much as establishing clear expectations and methods of communication. We strongly encourage you to define your expectations and communication strategy before you concern yourself with tooling. We also want to acknowledge that many tools exist for any particular use case. For example, for video conferencing, you could choose to use Skype, Google Hangouts, Zoom, or any of their numerous competitors. Which tool you choose is less important than clarity on what you are trying to achieve and how team members should use the tool.

Chapter One

Expectations

Budgetary Concerns

We subscribe to the *Good Jobs Strategy*[1]. In a nutshell, this strategy advises organizations to avoid underspending in areas that support employee effectiveness. This approach is both an act of trust with your employees and a smart investment.

1. Zeynep, T. (n.d.). The Good Jobs Strategy. S.l.: s.n. https://www.amazon.com/Good-Jobs-Strategy-Companies-Employees/dp/1480555401

Offer a one-time home office budget

It's important for all employees, colocated or distributed, to have work environments that are copacetic to creativity and productivity. Your organization should support your employees in making home-office improvements that help them work. This means making sure that your employees are working in spaces that are physically comfortable and that allow them to concentrate on their work and clients.

Truss grants each new employee $1,000 to spend on any home office supplies they need, including peripherals, monitors, chairs, ergonomic support, desks, and so on. This does not include things like monthly internet (your employees probably already have that), coffee to drink at home, life-size velvet paintings of Vigo Von Homburg Deutschendorf, or other aesthetic touches.

Pay for the good headphones

Whether your employees work from a home office, a co-working space, or a coffee shop, you want them to be able to focus on their work without noisy distractions. We recommend establishing a dedicated headphone budget for each employee and authorizing your employees to purchase high-end noise-cancelling headphones.

The Truss "standard" are the Bose QC-35ii, which retail for around $350, but there are others that are of similar quality that present different tradeoffs. For example, sales personnel or people continually on meetings may want to consider over-ear, noise-canceling headphones with a boom mic for better fidelity.

Provide an employee effectiveness budget

Truss has always had an expense policy that allows employees to spend Truss funds on things that improve their effectiveness — for example, software, laptop accessories, or other productivity-boosting tools. These purchases are completely within the employee's discretion so long as what's being purchased has a reasonable relationship to making the employee more effective (for instance, having coffee while working from a cafe, or purchasing a monthly subscription to a software tool that only that particular employee uses).

It may seem counterintuitive or strange to pay for things like café visits or fancy headphones, but this investment in effectiveness pays substantial dividends, not just for Truss but for many other companies. In fact, before adopting this approach, we did our homework and found that other distributed companies had similar mechanisms. In particular, we were influenced by GitLab's spending company money policy, which we encourage you to review.

Encourage employees to practice discretionary acts of kindness

We encourage our employees to use their effectiveness budgets to do nice things for other Trussels. Over the years, we've sent each other stickers, coffee cups, and yarn. Not just allowing, but encouraging employees to treat their coworkers to small acts of kindness directly helps members of our distributed team bond and increases team morale.

Implement managerial review of expenses

Lastly, just to make sure that no one takes an unreasonable interpretation of "effectiveness" or "home office," Truss has managers review and approve all expenses. To date, these budgets have not been abused. We more often than not have to remind people to use them, and we expect you will experience the same.

It is worth it

Although spending $1,350 on each employee initially, plus whatever you designate as an employee effectiveness budget, may seem like a lot, it is worth it. Truss has effectively no rent for a company of 100 people, which saves us well over a million dollars each year.

Moreover, following a distributed model means that Truss can hire anyone, anywhere, so long as they have a strong internet connection. This has provided a key recruiting advantage, as many Trussels could not work for us if we required them to be physically present in our San Francisco office (or any other office). The bottom line is better employees for less money — not too shabby.

Promoting healthy work practices

One of the biggest apprehensions we've heard from clients and other companies is around shifting the patterns of office work to a home environment. Healthy work habits are hard to manage when everyone is at the same location. By this logic, it seems that promoting healthy work habits across a distributed team must be even more difficult. This simply isn't true, although cultivating healthy habits outside of a physical office requires forethought and deliberateness. Here are some principles that have worked for us.

Sick leave

As of the writing of this playbook, COVID-19 is expected to get worse before it gets better. Based on the research we've done, a person infected with COVID-19 may need between two and four weeks to recover. For this reason, your sick leave policy may be one of the first things your leadership team should check and evaluate.

Truss's approach to sick leave is simple: We want you to be healthy, stay healthy, and keep your family and colleagues healthy. Let your team know, stay home, rest, see your doctors when it's needed. We have your back. This is not just Truss's approach to COVID-19, but rather has been our stance on sick leave since our first employees joined the team.

That said, we've been surprised that many Trussels default to "working through sickness," no matter how many times their colleagues and managers tell them to not work if they are sick. We've often had to encourage people who are clearly unwell to take the day off. Seriously.

As you implement your new sick-leave policy, your employees may need a bit of time to get used to it as they deprogram themselves of unhealthy work habits. Until your employees realize that you value their health and won't punish them for taking care of themselves, you'll need to reiterate this message.

Our advice to leaders: Do what you need to make it easy for your people to take care of themselves. You're building a resilient organization; expect to repeat the message and model the behavior you want to see.

Taking breaks

Employees of distributed companies may initially find it difficult to block off time to eat, take a break, or recharge. Some people may fail to identify breaks as part of a healthy work habit. However, taking breaks is an important part of sustaining a daily pace of production according to lots and lots of science and our own experience.

We encourage you to experiment with different ways of getting your employees to take breaks and to share success stories (and less-successful ones) with the rest of your company.

Implementing break times across a distributed team can be harder than it seems. We encourage you to record what works for various team members and share these practices broadly.

"I now try to take a 5-10 minute break every two hours. My version of a break is to physically move to another spot and engage my brain in something else: reading a book, making tea, doing some stretches, etc. I've found this practice really does help me re-center, and it's way easier to do things in two-hour blocks than six-hour blocks."

"I use the Time Out app to remind me to take breaks (although I don't always listen…). I also put musical instruments near my desk and when I see them, I'm reminded to play a song and stop working for a bit. I also avoid taking breaks that involve staring into the catacombs of social media. I also used to break up my day by going for a run or doing some other exercise for 30 minutes."

Boundaries between work and not work

When you're working from home, it's easy to do "just one more thing" and wind up grinding away for longer than you'd intended. When there isn't the fast train to catch home or a deadline to beat the traffic, the boundary between work and not-work can be fluid. Diffuse boundaries between work and not-work can lead to negative outcomes, though. Our observations (which are substantiated by researchers[1]) show that work quality degrades above 40-50 hours per week.

Moving to a distributed model is an opportunity to set or reset your expectations for work so that you and your company can be effective and resilient. At Truss, we encourage our employees to work about 40 hours per work week. We recognize that, at times, employees will need to work more than 40 hours, and we have policies in place to prevent burnout (refer to the following section on surge protection time for more details).

1. (2019, January 7). Retrieved from https://www.mortenhansen.com/how-to-work-smarter-not-harder-in-2019/

Surge protection time

Whatever your company's average work week, there will be times when deadlines, unexpected incidents, customer demands, or other issues require your team to work long hours. At Truss, we call these circumstances a "surge."

As a policy, Truss keeps a sustainable pace of work. We want our employees to maintain their health and sanity after a surge. To enable this, we ask employees to take time off to recover (this time off is known as surge time). If employees work more than 40 hours in a week — be it due to client-related travel, long days, or tight deadlines — we ask employees to let their managers know about the overage and ask for surge time. It's each employee's responsibility to determine how much surge time they need to fully recover, and we trust that employees won't abuse this policy (to date, they haven't). Because the primary intent of surge time is to help employees maintain a healthy attitude and work-life balance, we do not allow surge days to be used as floating holidays.

Staying connected

We're all still humans, even if we mostly only see each other in video chat. One concern of distributed teams is how to build connection and understanding when employees don't bump into each other in the hallway or by the proverbial water cooler.

This concern is particularly salient when your employees — who may not have experience with remote work — are suddenly required to work from home because of COVID-19. We've found that the following practices help people stay connected, reduce isolation, and lift the energy of your team so they can keep doing great work.

Being Humans Together (BHT)

One of the more creative and delightful ways to stay connected is to coordinate a standing video chat to talk about life outside of work. Being Humans Together (BHT) is an optional, half-hour weekly meeting at Truss, and many Trussels have claimed it's their favorite part of the week.

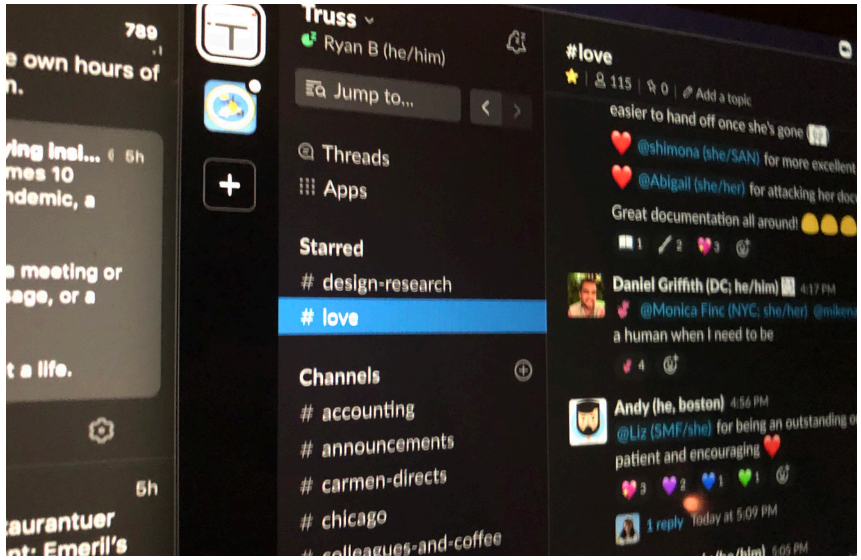
Here's how it works: Any team member who is interested joins the BHT video chat. If there are fewer than nine participants, each person gets two minutes to talk about anything they want to (talking about work is lightly discouraged). If there are more than nine participants, the meeting facilitator does a quick check-in to see how people are feeling, and then designates breakout groups of 3-4 people each; this allows participants to have more meaningful conversations. (We use Zoom for our video conferencing software, which has a feature to randomly create breakout groups. For more information about Zoom, refer to the "Tooling" section.)

Sometimes, we have prompts for our BHT calls. Sample prompts include:

- What's one story about you that you think really represents what you're like?
- What's your favorite dad joke?
- What's your favorite pizza topping?
- What's the story behind your name?
- What GIF are you today?

Have fun with it! The BHT call is a way to reflect and strengthen your own culture and values. Create a space for your team members to come up with a unique and creative expression that enhances the connections in your company.

Topic-based socializing



It's important for your employees to have a way to socialize in a lightly structured way, whether that socializing takes the form of working on craft projects, a book or movie club, or playing games together. Topic-based socializing allows your team members to build stronger connections, and it also fosters cross-team relationship building. It's also a great way to prompt employees to learn things about each other.

To promote topic-based socializing, we create topic-specific groups in our messaging application. Employees can join as many (or as few) of these groups as they prefer. These groups allow people to discuss topics of importance to them, helping those team members form strong connections to one another. (Note: We use Slack as our messaging app. See the "Tooling" section for more information about Slack.)

We've found that topic-based discussion channels really pick up once a company has more than 50 people. It's definitely OK to create topic-specific groups/channels if your organization has fewer than 50 people, but expect that there may not be much banter.

Colleagues-and-coffee messaging channel

A certain set of Truss employees are often able to make it to our Being Humans Together calls or participate in topic-based events, and some folks see each other often because they're on the same project or committee. To introduce some serendipity into the mix, we also have an opt-in channel that randomly pairs two (or three) Trussels together every other week. These Trussels hop on a short (30-minute) video call to discuss whatever's on their minds.

Our colleagues and coffee practice helps people to get to know teammates who they might otherwise not interact with, fostering a greater sense of cross-team connectedness. (Note: We use https://www.donut.ai to schedule the meetings and make the random assignments and Zoom to video conference.) This practice is applicable to groups over 30 and is highly recommended for groups of 50 or more.

Celebrations channel

We have a bot to remind us of folks' birthdays and Trusselversaries (join dates). It also gets the GIF party started. Team members opt in to have https://birthdaybot.io remind others of their birthdays or join dates in a stand-alone channel to keep distractions contained.

This practice is applicable to groups of 15 or more, although you may want to adopt it sooner if you don't have someone around who cares to track dates.

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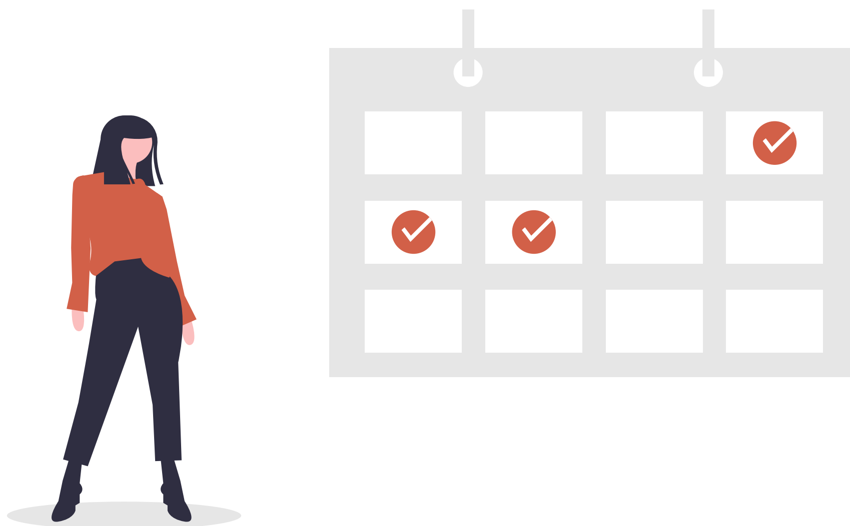
Chapter Two

Communications

Much work is collaborative, requiring coordination between teams, organizations, or individuals. In other words — meetings! A distributed workplace introduces a new set of opportunities and challenges for how your team can use meetings, check ins, presentations, and brainstorms to advance your organization’s objectives. We’ve catalogued our best distributed communications principles and practices here. We strongly encourage you to adopt these as company-wide practices.

Pick your battles (and your meetings)

Nobody likes poorly run meetings or too many meetings, but because we as members of a distributed team can't just bump into each other in the hallway (there is no hallway), we tend to have frequent meetings. This is OK, actually, but only because we've put a lot of energy into figuring out how to do them well within a distributed team.



A well-crafted set of well-defined meetings can make your team more efficient. The following list of meetings are those that should be implemented at a regular cadence for your distributed team. Please also note that trying to deploy all of these meetings at once is going to hurt. Pick one to start with and then gradually add, over the course of weeks or months, others that are relevant to your team. This approach will yield maximum benefits without the risk of open revolt.

Regularly scheduled meetings

The retrospective ("retro")

The retrospective is how your team gets better. Even better, this meeting is structured so that problems are uncovered and discussed in a blameless fashion. Well-run retros can cause a tidal shift in organizational culture away from “whose fault is this?” to curiosity about “how did this happen?” For this reason, one could argue that it’s the most important meeting your team has.

The function of a retrospective (commonly called a “retro”) is to get the whole team talking about what’s going well and what isn’t in a curated and constructive fashion. The output of the retrospective is a set of actions that are to be completed by the next retrospective with the goal of improving the team. Any improvements that result from retros are good — even small improvements, such as “Mark will ask facilities if we can have the lights not turn off at 5 PM.” These small, visible improvements demonstrate to your team that they can make impactful changes.

Many different retrospective processes exist — you should choose the approach that best resonates with your team. Our particular version is a riff on the UK Digital Service’s version, which is highly structured and takes 90 minutes. There are much shorter retro formats as well. Experiment with different formats until you find the one that feels most comfortable to you.

Interval planning

Interval planning (also called sprint planning) is how your team decides what it’s going to do on a week-by-week basis. This is where the team accepts work from the inbox/tasklist, schedules work in their backlog, gets business context from their lead or manager, and sets up their goals for the interval (or sprint).

As is the case with retros, there are many different ways to run interval planning. We like to start with a general overview or a review of news for the week, followed by a run-through of any work in progress, followed by inbox processing until the inbox is empty or the hour is up.

Truss believes strongly in a one-week interval and generally finds that higherperforming teams operate on a one- or two-week interval.

Daily standup

The standup is a 15-minute meeting that happens once per working day. It is a space where team members can share what they've worked on and what they're currently working on, raise blocking issues, and do tactical planning.

Although this meeting isn't required, it's extremely useful with new teams (so folks get used to how to report progress and catch missed expectations early) and in crisis scenarios (when the lay of the land is constantly changing and a weekly check-in cadence isn't viable). If video chat standups aren't possible, your team can hold asynchronous standups, where folks share their progress and blockers via chat, typically at a pre-appointed time.

Manager and report 1:1

Every member of your team should have a scheduled, one-hour meeting with their manager that happens at least every two weeks. This isn't a status meeting, but rather time for each person to have an in-depth discussion with their manager about problems, planning, career progress, and other issues. The report owns the meeting and runs the agenda.

Good meetings, bad meetings and how to tell the difference

Bad meetings, like bad policies and negative environments, are tractable problems. We've all been in bad meetings. No matter how great your crew is, bad meetings waste time and can degrade the culture you've worked hard to build. Once you've decided which meetings make sense for you and an appropriate cadence, you have to determine how to get the most out of those meetings.

Is this meeting worth having?

Any scheduled event has the potential to disrupt a coworker's flow. In the worst-case scenario, meetings can feel like a huge waste of time. In the best case, they often require context switching. Before calling a meeting, take a moment to think about whether you actually need someone to do something synchronously with you or whether working asynchronously could accomplish the same goal.

When it makes sense to have a meeting

An unnecessary meeting is a bad meeting. It is hard, however, to know the difference and a bad meeting for you may be great for someone else. Here are situations that we think require a meeting.

- **When something can't be decided on asynchronously.** We try to coordinate as many conversations as possible using a messaging app (for example, Slack, Hive, Chanty, or Hangouts). This practice allows team members to make simple, non-urgent requests that their coworkers can address when time allows. Online, text-based communication doesn't work for everyone, though, especially if multiple parties need to provide input at the same time, or if you're working on a single document that requires collaborative editing to move forward.
- **When important nuances of conversation could be lost.** In certain situations, the team could benefit from multiple mediums of communication — visual, verbal, and physical — happening concurrently. In these cases, call a meeting instead of communicating asynchronously.
- **When something has been decided, but there needs to be a group status update to move on to other things.** Sometimes you may be able to make a decision via text-based communication, but your team may have outstanding concerns or anxieties. A meeting may be the best (and most efficient) way to quell your team's fears. By holding a recap meeting, you can ensure that everyone is aware of the decisions that have been made, allowing the team to collectively move on to the next phase of the project.
- **To build team cohesion.** Asynchronous communication with occasional one-on-ones just doesn't keep the whole team connected at an optimal level. Sometimes the

team needs to get together to learn from each other and to realize just how aligned they already are.

When you shouldn't have a meeting

Some meetings do more to waste time than to move a project forward, which leads to a lot of frustrated team members. Here are some signs you're not having a meaningful meeting:

- **You're reading together.** There are some folks who just don't read the materials they're supposed to in advance of a meeting. Why they did not read it does not matter. What matters is that they are not ready to be in that meeting. They should leave or the meeting should be rescheduled (after profuse apologies).
- **Only one person is speaking.** If you want to give a presentation, own it! Recognize too that presentations are just as easily ingested in video or audio recording formats. Don't disrupt people's flows because you want to hold court.
- **You're hearing people talking about things they already know.** This isn't a meeting, it's a panel discussion. The same principles apply as listening to one person speak. If you're not up to adapting to your audience or working with them to get somewhere new, make a recording and distribute it. The knowledge is still useful, but the disruption of other people's flows is not.

The meeting itself

You've determined that you actually need to schedule a meeting — excellent work! Your next step should be to make sure that your meeting matters. Before holding the meeting, take some time to ensure that it won't go off the rails. We take the following steps to make sure our meetings are as productive as possible.

Create an agenda

Building an agenda is the most important part of the meeting. If you can't explain your agenda, you are not having a meeting. You want to hang out with co-workers. Cool, but don't pull people out of their work day. Follow these steps to create a solid agenda:

- Establish a concrete outcome for the meeting. You should be able to summarize your desired outcome in one sentence. Once you've settled on your outcome, make it the name of the meeting (on your calendar invite) or explicitly state it at the top of the call.
- Identify your requirements and blockers. What needs to happen for your team to realize your outcome? Are any of the people at your meeting blocking this from happening?
- Create a strategy for tackling challenges. Once you've identified your endpoints, list concrete steps you can take to move the group from point A to point B.
- Identify the leaders who can push a project forward. In general, avoid asking a decision maker to facilitate your meeting. The meeting facilitator should focus on running the meeting, and the decision maker(s) should focus on solving the problem at hand.

Time management

Time management is extremely difficult to get right, especially if you're new to facilitating meetings. Here are some ways to effectively manage meeting time:

- Pad for time. People will show up late. Decide how long you're willing to wait for stragglers and stick to your time limit. Keep in mind that waiting wastes everyone else's time and sets a bad precedent (in other words, don't add in too much padding). People will show up on time more often if they know you start on time.
- A/V will break. Show up early to troubleshoot if you have any A/V concerns.
- Leave time for questions. Folks will want to dig into topics that matter — set aside some time for questions and discussion. Leave time to open and close. Rituals matter!

Facilitating

You've done all the work, you're ready to try out your well-crafted agenda, and people are on the call or at the table (hopefully on time). What do you do now?

Set expectations around communication. First and foremost, demonstrate respect for each other and the clock at all times. If discussion points are time-bound (and they should be), then have a hard cut at time. Likewise, start and end when you say you are going to. If, at the end of the meeting, you haven't addressed any critical points, set a follow-up meeting or use your messaging service for an asynchronous update.

Another key practice is to follow the Rules of 1:

- Make one point and pass the proverbial mic to someone else. This balances the conversational load among all participants, which means that everyone will have a chance to be heard.
- One diva, one mic. Only one person should speak at a time. This practice prevents people from talking over each other and makes it easier for folks dialing in to hear the conversation. It also gives equal attention to all speakers.
- Have one empty chair at the table or one available slot for call-in. Leaving one "seat" open can help a latecomer feel welcome (and will make their entrance into the meeting less disruptive).
- Speak 1/Nth of the time. If you're quiet, know people want to hear from you. If you're gregarious, dial back a bit to make room for others.

You won't be able to follow all of these rules at all times, but they provide a useful framework for effective meetings. If someone from your team habitually violates these guidelines, give them a gentle nudge to help them course correct (as long as everyone at your company knows that the Rules of 1 should be followed).

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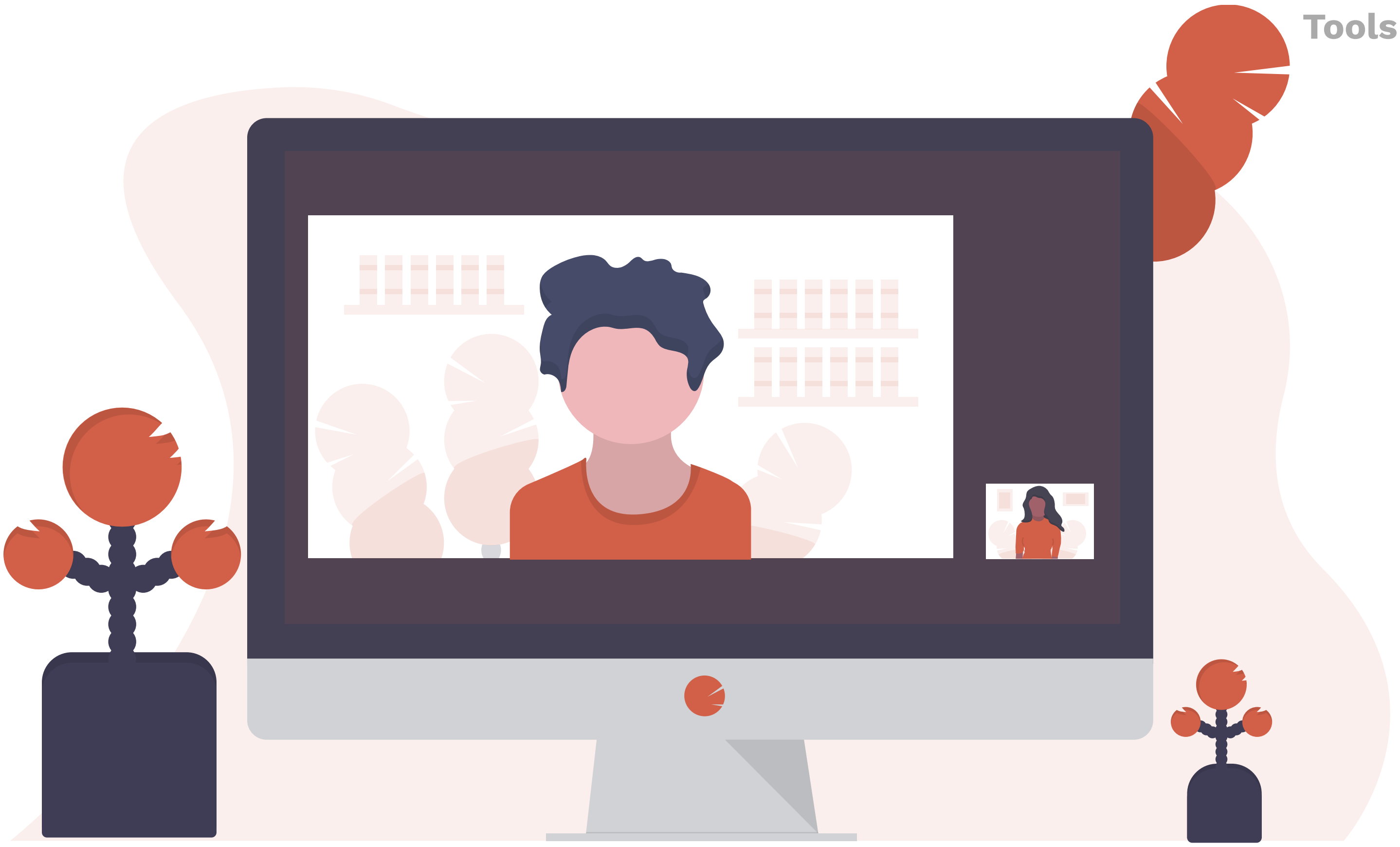


Chapter Three

Tools

Someone once said, “Don’t let your tools become your process.” This is key advice for working in a distributed office because you will, by necessity, rely on imperfect tools. A thorough review of the different types of tools is beyond the scope of this document, but we can tell you which tools we use for what purposes.

Security tools

Having a distributed practice requires different security measures than a physical office. We sincerely, truly, and deeply do not want to be giving you security advice. Seriously. But, we have found three tools to be sufficiently useful that we recommend you consider using them or their competitors.

Password Manager

We use a password manager to ensure that we use strong, unique passwords for all of our tools. We went with 1Password, but there are other password management tools that work just as well. Your organization should strongly consider adopting one and deploying it to every single device, including laptops, phones, and tablets.

Device Management

Truss maintains our devices via a tool called Fleetsmith. This means if we need to give device images to a client, or if we lose a laptop or a password, we'll be able to respond. We literally had a laptop stolen out from the hands of one of our employees and were able to remotely wipe the drive minutes later.

Backup

We use Code42's CrashPlan to back up our computers. It runs in the background and incrementally backs up files to cloud storage. Installation requires some manual configuration, but we can recover full images quickly. These benefits are definitely worth the effort.

Team chat apps

Why chat instead of email

There are many chat apps that your organization can choose. We picked Slack because of its many integrations, its security, and its price. Just because Slack works for us doesn't mean it will be the best option for your company. We encourage you to check out this post outlining some of the alternatives to Slack, but this section is going to cover Slack because it is what we know and use.

We value security. We also value open and transparent communication. Team chat apps are superior to email in every way by these standards. Specifically, team chat apps are walled gardens where you control who has an account (and thus can speak to your employees) and who does not. This eliminates the risks of viruses, malware, spam, and phishing that are prevalent across email. Also, as explained below, channels allow anyone to have discussions in public and semi-public forums that eliminate the spamminess of reply-all chains.

How team chat works

Slack and most other chat apps are organized into "channels" that define subject matters. Anyone can join these channels, and messages posted in a given channel will be viewable to all channel members. Channels can be public, meaning any employee (and clients/vendors/contractors who have permission) can be in them. They can also be private — limited to specific teams or individuals. Chat apps also allow you to direct message ("DM") any particular person so you can have a private exchange with them.

Truss defaults to every channel being public unless there is an explicit reason why a channel should be private (one example is our legal channel, whose membership is limited to the executive team and the general counsel). Maintaining public channels offers a dramatic increase in transparency over email; unlike email, public channels let people opt into — or out of — conversations as they wish. Public channels also serve as a searchable record of conversations, helping preserve institutional knowledge.

How we Slack

Trussels can join whichever channels they wish, but they are responsible for being able to receive critical communications and thus must be in a few channels. For example, if we hired a new engineer to work on the Happy Magic Fun Ball team, we would expect them to join their team's dedicated channel, another that is shared with the client, the engineering channel, and any other channel directly related to their professional development and project-specific updates.

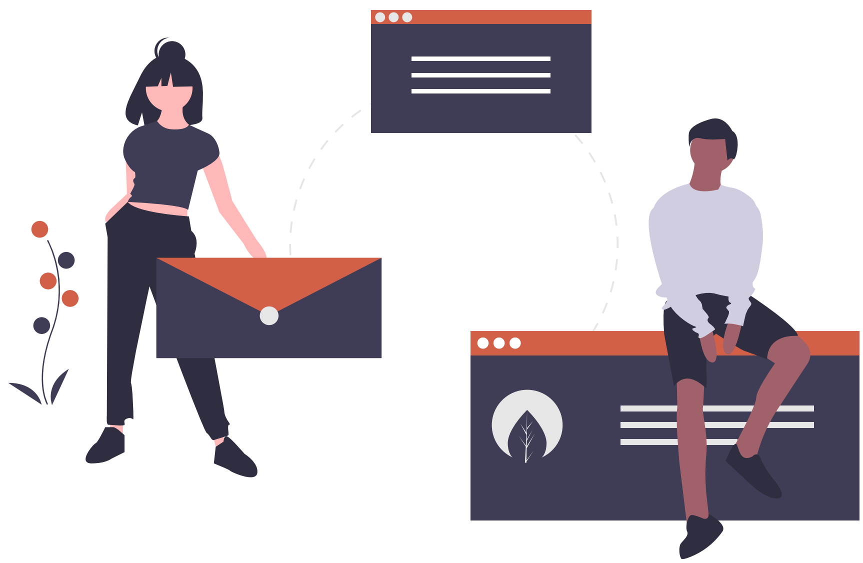
In addition, we add every new Trussel to a suite of general interest channels, including:

- **general**: Where we share all-company updates.
- **random**: Not sure where it goes? It goes here! (This is also where we chatter during our weekly all hands meetings, instead of in the Zoom chat.)
- **onboarding**: Questions & improvement suggestions for onboarding.
- **love**: Share love for your fellow coworkers and the things they do. This is a great place to call out the awesome things that you see someone do that would otherwise be invisible to the rest of the company.
- **wins**: A channel where folks list successes, large and small.
- **announcements**: Must-read messages for everyone at the company. Discussions about announcements take place in other channels, typically #general or #random.
- **rage_cage**: Where folks vent frustrations IN ALL CAPS. An amazing place for both catharsis and humor.
- **celebrations**: A channel where our birthday bot shares notifications of members' birthdays and start dates.

Team members can join various affinity group channels — channels for groups formed around shared gender, race, or other identities. Team members must request admission to affinity-group channels. Requests are approved by existing channel admins.

Trust us on this: you will have a lot of channels. After a certain point, your people cannot be expected to keep up with every conversation. Here are some suggestions we share with all employees:

- It's OK to mute channels.
- It's OK to leave channels. This should not be taken personally. Pop back in if you want to see what's going on.
- It's fine to join a channel to ask a question about that topic — #accounting or #bizops, for example — and leave once you get your answer.
- You aren't required to always be available on chat.
- We use a default Do Not Disturb schedule, but you can set one that works better for you.
- Nobody is required to immediately respond to every message, especially outside of normal working hours. Keep this in mind both when you ping someone else and when you are pinged.



- We consider it a best practice to respond to DMs by the end of the workday.
- Slack is not the best channel for emergency communications. Use the phone or texting when it's critical to get a hold of someone.
- Some of us use multiple Slack workspaces (Truss, client, etc). You can turn off unread notifications for the Truss workspace if that helps you focus on client work. If you're sharing a message of high importance, disseminate it across multiple channels. This way, everyone on the team can stay on the same page.

Video conferencing software

Why video conferencing

As is the case with team chat apps, there are many vendors in this market. Truss went with Zoom because their product had the fewest glitches and best integrations back in 2012. Since then, we feel that Zoom has only gotten better, but your organization may prefer to use another video conferencing software.

As a fully distributed company, we rely heavily on video conferencing software for our meetings. This system has worked out pretty well for us, despite some initial bumps. In particular, we learned that if one person is remote, then the entire meeting should be held via video conference. By requiring that everyone participates in a meeting using the same tools and in the same digital environment, we enable everyone to have the same expectations for how the meeting will proceed. This has resulted in more equitable meetings, more inclusions, and better participation.

How we Zoom

Spending a little time setting up Zoom helps make a good experience for you and your co-workers:

- When you set up your Zoom account, assign scheduling privileges to scheduling helpers or executive assistants so they can add or remove meetings on your schedule.
- Integrate Zoom into your Google Calendar to make it easier to schedule video conferences. We are also fans of the Zoom browser plugin that adds Zoom details to Google Calendar invites.
- If possible, use dual monitors. This will let you see a video of folks on one screen and share your other screen. Unfortunately, you will almost certainly find that Zoom puts the screens on the opposite monitors you want it to. Every. Darn. Time.
- Go into Zoom settings and uncheck “Prompt a confirmation before leaving a

meeting" so you can eliminate that bit of awkwardness where you've said goodbye but then have to look for the "exit meeting" prompt.

- Some people like to turn on the "Remind me" setting, which lets Zoom give you a notification of an upcoming meeting if you have the Zoom desktop app running in the background.
- Unless you are using a separate push-to-talk system (you probably aren't — see below), apply the following settings:
  - Check "Mute microphone when joining a meeting." This will prevent you from interrupting an in-progress meeting (and will generally help you avoid embarrassment).
  - Check "Press and hold SPACE key to temporarily unmute yourself" — SPACE is easier to find than the unmute button.
- Check "Turn off my video when joining a meeting." This will allow you to gather yourself before entering a meeting space, preventing potentially embarrassing moments.

- If you use the same email account for both Zoom and Slack, you can type /zoom in Slack to generate a quick join link. This is super useful for ad hoc meetings.
- Add your pronouns to your Zoom handle at set up. Doing this prevents confusion and normalizes inclusion.

When you're in a meeting, follow these helpful tips:

- Use the Zoom chat feature only for on-topic discussions. If you'd like to speak, type "hand" into the chat box. The presenter or facilitator can then walk through the hands in sequence. We've also found it useful to type "response" when you want to respond directly to something that someone else has said. Typing “response” allows the facilitator or presenter to “jump the stack” and call on you to respond, thereby allowing discussion to flow. Zoom does have a “raise hand” function, but we find it difficult to see and prefer just to use the chat.

- Banter can be a really positive contribution to any meeting, especially presentations. It also can be exceptionally distracting. The host should decide if they want banter, and, if they do, then they should make a thread in your team chat app — not Zoom — for banter. This mulleted approach allows business upfront in Zoom, with a party in the back on Slack.
- Full Screen mode is nice, except that it transforms the chat box into a floating window, which always seems to be in the way. Instead of using Full Screen mode, double click the window title bar so that the window grows to fill the screen (a subtle difference, granted). This keeps the chat box as a bar on the side of the video panel, minimizing distractions.
- To be able to see up to 49 participants in each meeting, go to the video settings and check the box for “Display up to 49 participants per screen in Gallery View.” Being able to see all of the participants on a call helps build connections and can minimize confusion.

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Conclusion

There you go. If you follow all of the above, we are pretty confident that you will be well on your way to developing the practice of being a distributed company. There will be challenges, but out of them you will create new practices, policies, and lore that uniquely fit your culture. Of course, there is a lot of nuance in what we learned that has not made it here, and we'll continue to update this document as we experiment more. If you want to share your thoughts or have a question, go on and drop us a line at why@truss.works.