

COMMUNICATION BEST PRACTICES IN A HYBRID AND REMOTE ENVIRONMENT

Every company has its own communication culture and norms. In addition, we all come to work with our own ideas of what good communication looks like which are shaped by many factors including past work experiences.

Given that we are a geographically diverse organization with a very flexible hybrid work model, we rely heavily on email and video meetings for communication. This makes our ICARE values more important than ever. A few tenets that are particularly applicable in communication include:

- Integrity - Is accountable
- Customer Focus - Responds to requests/issues with a sense of urgency
- Respect - Cares for others
- Respect - Listens with empathy
- Excellence - Collaborates
- Excellence - Contributes expertise and respects the expertise of others

With that in mind, we thought it would be helpful to put together some best practices for communication at LIMRA and LOMA.

The goal in sharing these communication best practices is to create a common set of expectations about what good communication looks like today at LIMRA and LOMA. It is in no way intended to be a set of rules against which we monitor one another.

IN ALL TYPES OF COMMUNICATION, REMEMBER THAT -

1. Tone can easily be misunderstood in a written message. Even more so when you don't know the person well. Review what you've written with that in mind and make every attempt to have sensitive or difficult discussions in person, via phone or via video.
2. Assume good intentions. Begin with the assumption that the person you are communicating with is as professional and helpful as you are.
3. You don't always know what's going on in someone else's professional or personal life. For example, we don't know what other priorities our colleagues are working on or whether they are under a great deal of stress.
4. Please and thank you go a long way.
5. Listening is critical in all forms of communication and for all involved.

EMAIL

Email Sender

1. If you have a firm date/time by which you must receive an answer/request fulfilled by, state that in the email. Be as reasonable as possible with the timeframe, understanding that your colleague also has multiple priorities and demands on their time.

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2. Be clear and direct about your question/request so the recipient understands your expectations.
3. Understand that long messages (e.g., more than two paragraphs) will usually take longer for someone to respond.
4. Only put people on the To line from whom you are requesting a response. People from whom you are not expecting a response should be on the CC line (e.g., on the email as a fyi). If you have specific questions for certain people on the To line, you should use the tagging feature (i.e. @[name]) for clarity.
5. If you don't receive a response of any kind to your email and it has been more than two business days, consider following up and requesting an update on when the sender can respond with the information/complete the request.
6. If the problem persists and is negatively impacting your productivity, consider whether other methods of communication or approaches would be more productive (e.g., schedule a meeting with the individual, if this is a regular issue with this person talk with your manager about how to best address the challenges it is creating).

Don't use email when -

1. You need an immediate response. Call, send an instant message, or schedule a meeting instead.
2. The topic is complex or would benefit from discussion. Schedule a meeting instead.
3. If an email conversation extends beyond 6-10 exchanges without a resolution. Consider calling or setting up a meeting to discuss the issue instead. Email is not always effective for resolving complex issues.

Email Recipient

1. Read all emails from LIMRA and LOMA colleagues, members, and partners.
2. If you are on the To line of the email and sender has made a request, asked a question or anything else indicating they are expecting a response, you should respond to the message within two business days of receipt.
3. Use Automatic Reply when you don't expect to be able to respond to emails within two days (e.g., taking time off, traveling for business, attending meetings most/all day). Your Automatic Reply should include information about when the sender can expect to hear back from you.
4. If you cannot fully answer the question/complete the request within that time frame, you should still respond within the two business day window by acknowledging receipt of the

COMMUNICATION BEST PRACTICES IN A HYBRID AND REMOTE ENVIRONMENT

message and including a timeframe when you expect to be able to reply with information/complete the request.

- a) Ensure you follow up within that time frame.
 - b) If you need additional time (e.g., the question/request is more complex than you initially thought, something else that requires your time has come up), proactively communicate that to the sender and update them with the new time frame in which you will respond/complete the request.
5. If there are other people on the To line in addition to you and the sender has made a request, asked a question or anything else indicating they expect a response, the above expectations regarding a response apply to everyone on the To line. At a minimum you should reply to acknowledge receipt and clarify you have nothing else to add (e.g., you agree with what has been said thus far, you don't have additional information to contribute, etc.).
 6. If you are on the CC line but have valuable information or input on the email topic, you should also respond to the message within two business days of receipt.
 7. If you're not clear on the sender's needs or expectations, ask for clarification to avoid misunderstandings.

WEBEX CHAT

Use of WebEx chat is encouraged.

1. WebEx chat is typically used in a more informal basis where you already have an established working relationship.
2. WebEx chat is best used when you are looking for a quick answer to a simple question or when you are looking for a response in a timely fashion.
3. Email is a better tool to use when your topic requires details or you don't need a response instantly.
4. Email should be used when you need to keep a written documentation of a topic - especially for records retention purposes.
5. If you are not using WebEx Chat – we recommend you change your status to alert people. For example, change your status to “Please call or email me instead of sending a chat message.” A status change will only last up to seven days so you will need to reset it as needed.
6. If you have sent a WebEx Chat to someone and it's gone unanswered, we recommend you call or email instead.

Please see the [WebEx Chat Best Practices guide](#) for more information and tips for using this communication tool.

VIDEO MEETINGS

1. Your camera should be on for video meetings unless the meeting organizer has indicated that having your camera on is optional. Being able to see one another contributes to better

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communication since we can see each other's expressions or when someone is trying to speak/join the discussion, and it encourages more active participation and engagement in the meeting.

2. It is understandable that from time to time, you may need an exception to the camera-on expectation (e.g., experiencing technical issues, feeling under the weather, taking the meeting from a public place such as a conference or airport). If that is the case, let the meeting host know in advance that you will not be on camera.
3. From time to time, reread our [Meeting Practices](#) guide to ensure your meetings are productive.