



Effectively Communicating, Building Trust and Finding your Rhythm in a Work Smart Workplace

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A Work Smart workplace is one that is designed to allow for a flexible and collaborative environment where work is efficient, and as an organization, Wisdom Tree is cultivating a culture of trust.

Being tasked to be successful in a high-autonomy culture where employees are primarily working remote from one another offers its share of challenges such as balancing professional and personal priorities, maintaining high-performance, managing time, staying engaged, fostering relationships and feeling connected with one another.

In the presentation, we examined the following best practices, strategies, and tools for consideration on how to work better together and which support productivity, effective communication and building good work relationships.

After attending today, were there any takeaways or insights that resonated and which you feel you would benefit from? Please share any commitment(s) and action which you will take ownership of, at the bottom of page 6.

Value your time and energy

- Set aside a block of time in your schedule to achieve pure focus time.
- Leverage Microsoft TEAMS to remain focused and maximize productivity.
 - Set your status when applicable to: Away, Focus, Busy so others are aware.
 - When needing focus time, silence notifications on your cell phone and turn on Quiet time using the Microsoft team's mobile app. This feature is designed so that you will not receive any messages during a specific time period.
 - Leave an autoresponder message when you're going for a walk or simply taking a break, to indicate to colleagues that you've stepped away.

- Keep your Outlook calendar up to date.
- Leverage time blocking for particularly busy days. Establish a few blocks to help you avoid becoming overwhelmed, reduce stress and stay focused. Time blocking helps reduce the number of choices you have to make for a given day. You will accomplish more in terms of your productivity when you're focused for a set time period, for example 90-minutes, than if you were to stretch out a project over multiple smaller blocks.
- Notice how you feel in the clothes you wear when working. When wearing more relaxed attire such as a sweatshirt versus a more business casual shirt or blouse, does it change your energy level? Notice how you communicate when wearing different colors and how it affects your motivation, if at all.

Project Management

- [Monday.com](https://monday.com) is a tool that has been steadily used at Wisdom Tree by various departments. It enables teams to manage their projects, tasks, and workflows in a collaborative and visually intuitive interface. You can set up project boards, assign tasks, track progress and communicate with team members. Ask to learn more about it!
- [Trello.com](https://trello.com) is a popular tool and is often used to prioritize activities in a very visual way by those who have frequent shifting priorities or who may be in a support role. It is used to track individual tasks which can then be moved between lists as you progress.

E-mail

- When having a particularly busy day, commit to checking all pending emails by the end of the day.
- If you're responding to e-mails after hours, consider other time zones and scheduling them for the next morning.
- Leverage the power of the P.S. so your e-mail stands out when you want the recipient to act on something or you want to remind them of something important, they should plan for. E.g. you're taking a 1-week vacation or an upcoming project deadline.

Communication and Building Rapport

- Communicate with your manager any consistent times when you plan to be offline. For example, if you choose to take 30 minutes daily to go for a walk during your lunch break for example.
- Check in with others on your team, outside of formal meetings. Perform outreach with others in the organization just as you would in person when cultivating your network.
- Ask team members what the best times are to reach them and when meetings ideally would be held, keeping in mind home, family considerations as well as your own so you can strike a balance with each other as a team.
- Join the meeting before the meeting. Attend a schedule call 5 minutes early and if anyone has also joined early, use the time to make small talk and learn more about your colleagues. You can talk about the weekend, interests, family.
- Stay visible with your camera on. If you're not able to put your camera on, let your team know.
- New hires - take the time to get to know them. Check in to see if they may have any questions during their first month at Wisdom Tree. Help them get acclimated.
- Check in on employees returning from short or long-term leave. Ask to see how they 're doing and if you can help catch them up on anything to get them up to speed since their leave.

- Clarify the rationale behind your decisions. Speak to the Why, before the What and How. Center your communication around reasons first to gain buy-in.
- Your body language acts as a decoder for communication. Communicating by e-mail, for example, can leave your intention wide open and subject to interpretation. When someone misunderstands your meaning it can create anxiety, affect morale and engagement. Make a conscious effort to smile, make appropriate hand gestures when speaking, lean into the camera so your face is centered, and you are well lit.
- Connect with colleagues over chat to build enthusiasm. Consider emojis when using the chat function to express your energy and intention given the context of the discussion.
- When planning to go into the office, send a group e-mail to ask if anyone can meet or mention it in a team meeting; Let your manager know should he or she want to come in because you've informed them you'll be in-person.
- Ask for feedback. Hold mini-performance evaluation meetings with your manager. Ask open-ended questions so that he or she can give you qualitative feedback. Be specific, briefly discuss past performance but focus on advancement opportunities and what you need to accomplish to earn them.
- Practice active listening when empathy is required or you're working through a concern or problem with a colleague.
- Take ownership of meeting recaps by summarizing any important points or calls to action that you can share afterwards with the team including those who may not have been able to attend.

As a Manager or Supervisor:

- Set virtual office hours with your team so they can schedule time to drop in to ask a question or share an idea just as they would if you were in a physical office.
- Organize virtual times to bring your team together. Create intentional spaces for celebration, such as birthdays, pizza parties, Lunch and Learns. Lunch and Learns are great opportunities to connect with and learn from others across departments. Employees can educate others on their function, role and even product launches at Wisdom Tree.

- When scheduling a 1-hour or longer meeting, leave 10 minutes at the end for team building. Encourage your team to use the remaining time for discussion and chit chat, creating a similar experience that would normally happen in an in-person meeting.
- Maintain frequent transparent and consistent communication by holding regular individual and team check ins, including those that offer feedback.
- Scan for issues and obstacles. Notice any patterns with certain issues that you can address and help solve. Encourage your team to “sound the bell” and schedule a huddle when concerns should be raised.
- Create an in-person event well enough in advance for everyone to make plans to come into the office and have ample notice.
- Find out when large company events are scheduled at Wisdom Tree so you can communicate that to your team, and they can block it on their calendars.
- Create a culture of collaboration by initiating productive team huddles. These are excellent opportunities to get together such as for:
 - Postmortems on key projects. These are performed at the end of a project to discuss what went well and what went poorly so you can use those lessons learned going forward.
 - Debriefs
 - All-Hands Meetings
 - Planning or Critical Review Sessions

Remember, the Pareto Principle! 20% of your efforts will deliver 80% of your results!

What is one action that you will own and commit to that would impact any of the following: **[productivity, communication, leadership, management style, energy, visibility, career advancement, work relationships, wellness/health, family, network]**?



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MARISA SANTORO, a former Wall Street IT executive with a 21-year career in Financial Services is the founder of the career leadership platform and Gutsy Leader community, **In Our Shoes** (InRShoes.com). She is a corporate leadership trainer, keynote speaker, career coach, diversity and inclusion consultant, and author of [Own Your Authority](http://OwnYourAuthorityBook.com) (McGraw Hill). (OwnYourAuthorityBook.com). Her dynamic and relatable style engages audiences and leaves them with real, practical tools they can hit-the-ground-running with immediately. Her signature style invites participants to make ‘gutsy moves’ – take small incremental action that have the potential to increase their impact over time.

Her expertise in leadership and professional development, as well as effective business communication, has been brought in to support business leaders across industries at organizations such as Pfizer, Merck, American Express, UBS, Anheuser-Busch, Allianz Global Investors, Sony Music, S&P Global, State Farm, Royal Bank of Canada (RBC), New York Council of Nonprofits, Women in Tech International (WITI), Aetna Healthcare, New York University (NYU), NYU Langone Medical Center, New York and New Jersey municipalities and many more.

She is also a TEDx speaker, and honoree of the Woman of Influence award from New York Business Journal and BizWomen.com for her years of mentoring and coaching midcareer leaders, executives, healthcare professionals, and sales leaders to achieve higher levels of influence.

She also writes a [career column for American City Business Journals](#), covering their how-to career and business strategy sections, with articles published across 44 cities in the United

Her [TED talk, “Speaking Without Apology,”](#) guides on how to detach from language that feeds into the “Sorry Syndrome” and make subtle tweaks in your speech to springboard you from diluting your value to spotlighting your assets immediately.

She guides professionals how to reclaim their confidence, tap into their instincts and embrace their inner dialogue using proven tactical tools, and strategies in proven step-by-step career leadership programs coaching on ways to authentically build trust as leaders and advance in their careers.

She delivers seminars, workshops, webinars, coaching, microlearning “just in time” modules, and self-paced multimedia courses to fit your organization’s training needs. Her work has been integrated to launch Women’s Leadership Initiatives, Leadership Academies, Diversity and Inclusion Initiatives, New Hire Programs and used in learning and development programs across government agencies, nonprofits, and organizations in the financial services, health care, real estate, education, and wine sectors.

In the world of leadership development, there’s no shortage of advice on what to do to drive career success—but very little is said about who to be and listening to your intuition. While leadership skills are important, self-trust is the foundation that great leadership is built upon—and developing it is a deeply personal process. In [Own Your Authority](#), career leadership expert Marisa Santoro provides the knowledge, tools, and insights you need to understand and embrace your authentic personality and trust your intuition.

“This is the heart of increasing confidence in any area,” she writes, “taking on risk in small increments, stepping into new territory, facing fears, learning, failing, growing, and circling back to take on more risk that will stretch but not freeze you.”

Great leaders communicate clearly, speak up when it matters most, and thrive on taking on measured risks. Through self-awareness, they embrace acts of discomfort every day—all in the name of learning, growing, and achieving higher levels of influence and leadership.

And it all comes with self-trust and confidence.

CERTIFICATIONS

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