Management Training: Using Daily Reports with Remote Workers

By Lin Grensing-Pophal, Contributing Editor Apr 21, 2020 | HR Daily Advisor

With unprecedented numbers of employees shifting to remote work for many companies in response to the global COVID-19 pandemic, managers are facing new challenges when it comes to supervising their teams.

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Yesterday, we discussed a number of tools and strategies managers can employ to be more effective at managing remotely. One of these we mentioned briefly is a daily report. Here, we flesh that out in more detail.

A Role for Daily Reports

Daily reports are admittedly a poor substitute for being able to talk to staff face-to-face, at least in terms of human interaction. But what they lack in the personal element can be more than made up for in their ability to provide transparency and tracking consistently across all staff; daily reports can be extremely useful even outside of the remote work context.

Emphasize—and Demonstrate—Their Value

It's crucial that the importance and usefulness of daily reports be communicated clearly to staff. Otherwise, these reports can quickly be seen as yet another tedious task with no real value. Consequently, it's also crucial that managers actually make use of the daily reports in a way that is apparent to staff.

Nobody appreciates spending time on a daily report that just sits in his or her manager's in-box. A great way to show staff that the reports are useful and being used is to review them in regular staff meetings.

Flexibility and Consistency

There is no magic formula for how to structure a daily report—although, below, we'll talk about some key elements to include, and some staff may prefer different formats. Still, it's important to balance being flexible with what works for individual staff with consistency. Consistency makes it easier to compare apples to apples and track the same items over multiple reports.

It can be a big challenge for managers who have never had remote staff to suddenly have to manage an entire remote team. Daily reports can provide extremely valuable transparency into employees' ongoing activities.

Anatomy of a Daily Report

Different formats may be required for different companies and different employee roles, but these basic items are a great starting point on how to customize a daily report.

Describe the task. Obviously, describing the task being performed is an important part of a daily report. The level of detail will depend on multiple factors, such as how often the task is performed, if there are any special considerations, if it is a high-priority or high-importance item, etc.

Name the specific details. Whether it's naming a project, customer, or internal client, identifying the broader activity an individual task relates to helps with both the organization and the tracking effort across work items.

This could include a specific internal project like “Tracking Product A-123 Throughput in Plant Z.” It could also refer to specific internal or external stakeholders, like “Sarah Hernandez—VP Operations” or “Acme Corp.”

When used in a spreadsheet, a column identifying the project or stakeholder can also help quickly filter activity by that criteria to get an idea of the time and effort a team or an individual is spending for certain activities or clients.

Tracking time. Depending on the organization and the activity, time spent can be tracked at various granularities. Legal professionals typically track time spent on client matters down to 6-minute (10% of an hour) intervals. Other organizations might be fine-tracking time at the hour or half-hour level. The key is that it’s done and done accurately.

Again, this is key to giving managers transparency into where and how staff are spending time. If they see a disproportionate amount of time being spent on certain projects or doing tasks for certain internal stakeholders, for example, managers may need to step in and make adjustments.

Due date and status. These can be separate fields or columns, but the relationship is obvious. If an item has a due date that has passed but the status is still “active,” that could be a problem. Similarly, if the due date is tomorrow and the status is “pending” or “open,” that could mean the deadline is at risk.

Priority. This can be a simple high, medium, or low—whatever is necessary to communicate the importance of certain tasks to managers.

Needs escalation. Managers may be able to determine if an item needs escalation simply by closely reading the description of the task or the status relative to the due date. But having a separate column specifically to flag whether something needs escalation reduces the risk of it getting missed, especially when reading multiple reports on a daily basis.

There isn’t necessarily a “right” or “perfect” format for staff daily reports, but there are certain key items that should generally be included. This consistency makes it easier for managers to track similar items across the entire team and simply makes it easier to stay organized.