

"Out of Sight, Never Out of Mind": Managing a Team You Can't See But Fully Depend on

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1. Background

The rapid expansion of remote work within our clinical research finance team created both opportunities and operational challenges. What began as a small group of three employees during the COVID transition has grown into a fully remote team of eleven over 5 years. As the team expanded, our existing structure—built largely on the honor system—proved insufficient for ensuring accountability. While trust remains essential, remote work introduces barriers that make unverified processes vulnerable to oversight gaps, especially in task-driven functions such as invoicing.

2. Goals

Our initial remote model relied on previous in-office relationships, established invoicing schedule, shared logs, and OnCore tracking to monitor pending items. However, these systems provided no mechanism to confirm whether an invoice had actually been sent. This gap surfaced when invoices were missed despite all checklists appearing complete. Management required a deeper audit of individual workstreams to identify what had been completed and where breakdowns occurred. This process revealed the need for more deliberate structure and transparent workflows.

3. Solutions and Methods

In response, we implemented several targeted strategies. Invoicing procedures now require all submitted invoices to be copied to a shared group email, creating verifiable documentation and real time visibility. We also introduced a monthly invoicing review meeting to reconcile expected versus completed items. These changes, while initially perceived as potentially micromanaging, ultimately created clarity, standardized expectations, and reduced the risk of missed revenue. Beyond invoicing, we redesigned our meeting framework to increase efficiency by focusing each meeting on a specific operational area while acknowledging the balance between necessary communication and meeting fatigue. Clearer expectations improved overall engagement, particularly as remote settings can make participation more passive.

We also strengthened one-on-one engagement, recognizing that individual connection is critical for remote management. Training occurs via Zoom with more detailed guidance and accessible work instructions. Consistency, follow-through, accountability, and communication emerged as the foundational elements that keep our fully remote team aligned and supported.

4. Outcomes

The outcomes of these changes include improved invoicing accuracy, better workflow transparency, more engaged team communication, and increased confidence in remote operations.

5. Lessons Learned and Future Directions

Managing a fully remote team requires intentional design, reliable systems, and regular touchpoints that replicate the awareness typically gained in an in-person setting. Our experience demonstrates that remote work can scale successfully when supported by structured accountability measures and strong, consistent communication practices. As we continue to grow, the next phase of development includes expanding staff capacity.