

Virtual Teaming

“Working Together Apart”



Robin Redden
August 28, 2008

Agenda

- It's a Brave New World
- Skills for Effectiveness
- Additional Hints and Tips
- Conclusion
- Checklists/Behavior Framework
- Resources

Ever wonder if you should be working from home?



It's a Brave New World

- Today, it is clear that to compete for the future, we need to work smarter as we can't work harder and we can't work more hours in the already hectic schedules we have.
- 5th Generation Work, as it's becoming known as, operates in virtual space from any distance, any time, and anywhere. Globalization, recent technology advances, and changes in business methods are the enablers making this possible.
- By 2010 employees will spend
 - 30% of their work day alone
 - 5% in the same place and time
 - 25% in a different place and same time
 - 40% in a different place and a different time



The Evolution of Virtual Teams



Many contributors including:

- Organization-wide projects or initiatives
- Alliances with different organizations, some of which may be in other countries
- Company mergers and acquisitions
- Emerging markets in different geographic locations; **Market Globalization**, allows for local response (on site representation) which allows new growth opportunities
- **Location of talent/skill** now worldwide
- To gain global efficiencies
 - A need to **reduce time-to-market** or cycle time in general to remain competitive
- **Evolution in technology** has been created to allow better communication
- The desire of many people (flexibility) and government organizations (reduce pollution, road wear, general wear and tear on infrastructure) for **telecommuting**

Many Challenges of Virtual Teaming

- **Communicatively INTENSE and Complex**
- **Misinterpretation of Communication**
 - Language differences
 - Non-verbal cues missing
 - Technology constraints
- **Distance Threatens Trust** *the key ingredient to successful virtual teaming, the “glue”
- Differing **Cultural Expectations**; Differing ways of doing business
- **Relationship Building**
- Differences in Compensation/Benefits
- **Takes longer** to reach consensus, make decisions
- Usually a matrixed reporting structure

Many Challenges of Virtual Teaming, cont.

- **Can be** Isolating and Exhausting
 - 24 hour world clock – work life balance issue
- Creates Additional Conflict, **both Role and Interpersonal**
- Reduces company identity/reduces company loyalty (e.g. “IBMer” “Bleeds Blue”)
 - How to build it?!
 - Local leadership is more efficient, the employees understand the stories, the leaders speak the “local” language and know the culture
 - **Teams have and need shared experiences** and stories
 - Company myths/legends/stories are needed for “identity”
 - Harder to use Symbolism or terminology to create virtual identity
- Expensive (**Travel, technology, projects take longer**)
- **Higher turnover rate**
- Distance “AMPLIFIES” any normal team problem
- **Harder to determine individual status in the organization**



Challenges of Email

- Limited feedback
- Reduced visual or social cues
- Excessive attention to statements made in written form
- Biased perceptions of others
- Dispute resolution difficult

Challenges of Audio/Web conferencing

- Reduced visual or social cues; video quality not fine-grained enough to see facial cues
- Interruptions are difficult
 - **Turn taking skills**
- Technology failures
- Voice delays/echoes can cause slow moving, halting conversations or asynchronous voice and image
- Misunderstandings
- Dominance by one of two participants
- **Lack of attention by some**
- Speakers not always familiar with the technology

3 Major Differences between Virtual and Traditional Teams

- Can't track folks down **and force them to answer questions if you can't find their offices**
- Difficult to form emotional connections **with teammates without face-to-face contact**
 - Virtual teaming tougher for “visual” people as facial and body cues are missing; easier for “auditory” people (good at phone listening for example)
- Cannot get away with ambiguity and confusion **because there aren't enough casual contacts to “catch” misunderstandings**
 - Absolutely necessary to provide clarity on objectives and timelines
 - Another reason why building relationships is so important



Agenda

- It's a Brave New World
- **Skills for Effectiveness**
- Additional Hints and Tips
- Conclusion
- Checklists/Behavior Framework
- Resources

Effective Virtual Leadership is crucial

- Keep everyone focused
- **Leadership determined by the experts**
 - Open Source, Linux good examples (brilliant 15 year olds become the industry “experts/leaders”)
- **New knowledge, skills and practices** necessary for success
 - May not transfer from the traditional face-to-face workplace
- Managers need to:
 1. **Track productivity** vs. hours at a desk; mgrs are not elementary school teachers taking attendance
 2. Provide emotional support and some feeling of **team belonging**
 3. **Support and coaching** is harder to do...**build** your **skills**
 4. **Provide inspiration**
 5. **Have regular meetings**, if no agenda talk about the weather, but talk regularly
 6. **Be massively redundant**, use several examples
 - redundant does not equal repetition; say in several ways

A New Model of Team Development *J.McGrath

STAGE	DESCRIPTION	TASK ACTIVITIES	DESCRIPTION	SOCIAL ACTIVITIES
1	Inception	<input type="checkbox"/> Select goals <input type="checkbox"/> Generate preliminary plans <input type="checkbox"/> Generate ideas	Interaction/Inclusion	<input type="checkbox"/> Ensure team member inclusion <input type="checkbox"/> Ensure opportunity for participation <input type="checkbox"/> Define initial roles
2	Problem-solving	<input type="checkbox"/> Select technical problems to be resolved <input type="checkbox"/> Solve problems with correct, known answers <input type="checkbox"/> Solve ambiguous problems	Position status/role definition	<input type="checkbox"/> Address status of team members <input type="checkbox"/> Clarify and refine roles and expertise
3	Conflict Resolution	<input type="checkbox"/> Resolve conflicts about different points of view <input type="checkbox"/> Resolve conflicts stemming from different interests	Power/resource allocation	<input type="checkbox"/> Address power differences between team members <input type="checkbox"/> Address interpersonal relationships <input type="checkbox"/> Address how different solutions affect power allocation to different functions, regions, and/or countries
4	Execution	<input type="checkbox"/> Perform tasks <input type="checkbox"/> Address organizational barriers to performance	Interaction Participation	<input type="checkbox"/> Ensure equal participation <input type="checkbox"/> Ensure effective interaction and communication

3 Factors that Affect Virtual Team Dynamics

1. Project Time

- The **greater the complexity** of the team's tasks, the **greater the conflict and time needed** re: clarifying roles, problem solving approaches and goals, especially prior to the execution phase of the project.

2. Environmental Influences

- How rooted the team is in the organization
 - how supported are the team's activities by the organization's structure, reward structure, communication channels, and processes
- Unequal working conditions

3. Team composition

- Cultural differences
 - **especially** factors of **independent vs. participatory** orientation, **power distance** (team members at various power levels in the org), and **uncertainty avoidance**
- Differences in functional background (e.g. test, development, service)
- Team size

Core Leadership Skills in a Virtual Environment

- Greater self-confidence (don't get threatened; don't baby-sit others)
- Ability to delegate (willingness to leave people alone to do their work)
- Adaptability (to different people, different cultures)
- Ability to focus on goals
- Communication is everything (frequency, planned and unplanned, social vs. task)
- Allowing flexible working schedules
- Coordinating as opposed to managing
- Act in a mentoring role; exhibit empathy towards other team members
- Have to market what your remote employees are doing to get them visibility/exposure
- Encourage peer mgmt/responsibility
- Follow the **Two Stage Model** of virtual leadership
 - 1.Face to Face – Build relationship and trust first; Create/manage expectations
 - 2.Electronic/Multiple media – Maintain trust, interpersonal/cultural sensitivity, constant communication



Core Team Member Skills in a Virtual Environment

- Returning messages quickly
- Delivering work on time
- Asking for clarification
- Dealing with the reduction in social support
- Independence
- Organization
- Reliability
- Autonomous
- Honesty
- Self-motivation
- Following corporate rules - conscientious

Motivating Virtual Team Members

- Teams are **more motivated when there is a large amount of “social capital” built**
- To built social capital, 3 things are necessary:
 - Trust – **unrelated-to-work conversations act as a “trust accelerator”**
 - Reciprocity – Giving WILL lead to receiving (put another way: Cooperation vs. Competition)
 - If members feel well-connected socially, healthy, and economically stable they are more motivated

Developing and Maintaining Trust

- Trust is the single most important factor** in effective virtual teamwork.

 - In a virtual environment trust tends to be established - or not – right away. First interactions are critical.

 - Competency matters.

- A **Personal Relationship** is essential; mutual respect, not necessarily friendship, is needed.

 - An “electronic courtship” or series of social/personal background exchange is important prior to work getting done.

 - Assigning each member an initial task enables each to “identify” with the others.

 - Always display concern for the well-being of others.

- Equity matters.

 - “the effortful principal”** is when one part of the team believes other members of the team are not working as hard.

Developing and Maintaining Trust, cont.

- Virtual teams are more sensitive to perceived violations of trust.
 - Act with integrity.**
- Proactive, positive, action orientation in communication is essential.
 - One pessimist has the potential to undermine the entire team.**
- Teams who are provided with **Virtual Team Communication training and Trust training**
 - develop higher levels of cohesiveness faster
 - develop higher levels of perception of process
 - have higher levels of satisfaction with outcomes
 - exhibit higher levels of trust
 - exhibit higher levels of trustworthiness
 - have higher relational links between members

Agenda

- It's a Brave New World
- Skills for Effectiveness
- **Additional Hints and Tips**
- Conclusion
- Checklists/Behavior Framework
- Resources

Selecting the Right Media for Different Messages

- Complexity of the info (manuals, video)
- Importance of adaptability (F2F)
- Permanent record (written)
- Symbolic impact
- Familiarity of the media
- Issues of time (constraints, zone)
- Need for immediate or spontaneous response
- Impact
- Amount of info
- Relationship you have with the other person
- **Media Richness Theory** states:
 - Use more channels when the message is
 - Important
 - Complex
 - Ambiguous
 - Use a more personal channel when
 - Feedback is critical
 - You want attention

Feedback, Goal Setting, and Performance Mgmt.

- **CLEAR Goals = Better Performance**
- **Use Feedback, Goal Setting, and Performance Management as a retention tool**
- Especially important in a virtual environment
- Understand employee development needs
- **SMART goals** (Specific, Measurable, Attainable, Realistic, Time bound) are very effective
 - **Focus on** things that might get in the way (**blocks**)
- Ambiguous virtual environment requires MORE feedback MORE often
- Diagnostic info/Feedback
 - Doing great and here's exactly why (Reinforcing) or Off course and here's exactly how (Redirecting)

Cultural Meaning

- The Dairy Association's huge success with the campaign "Got Milk?" prompted them to expand advertising into Mexico. It was soon brought to their attention the Spanish translation read "Are you lactating?"
- Coors put its slogan "Turn it loose" into Spanish, where it was read as "Suffer from diarrhea".
- Scandinavian vacuum manufacturer Electrolux used the following in an American campaign: "Nothing sucks like an Electrolux."
- Pepsi's "Come alive with the Pepsi generation" translated into "Pepsi brings your ancestors back from the grave" in Chinese.
- Frank Perdue's chicken slogan, "It takes a strong man to make a tender chicken" was translated into Spanish as: "It takes an aroused man to make a chicken affectionate."
- Chevrolet introduced its Nova car model into the Mexican market with less than expected sales. "No va" translates into Spanish as "Does not go".

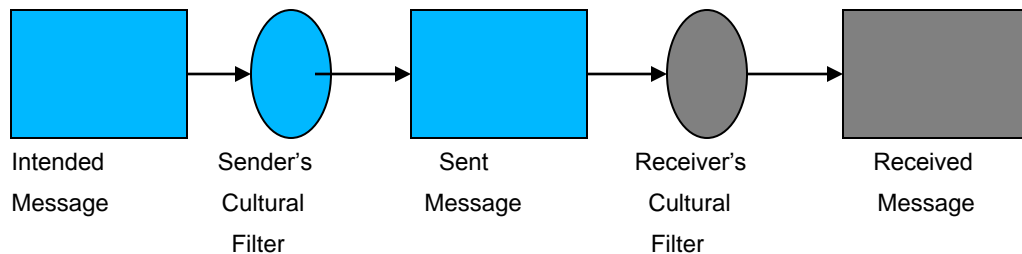
Cultural Diversity

- Cultures develop over time; Determinants include

 - Social Structure, Religion, Political Philosophy, Economic Philosophy, Education, Language, Cultural Norms and Values

- Cultures are complex and messy

- **Culture Acts as a Filter** through which intercultural communication is sent and received



- **Become a “cultural investigator”**

 - Know your filter/biases, research other filters/cultures, avoid judgment/conclusions

 - Rephrase to confirm, ask for clarification more frequently

Cultural Diversity, cont.

- **Beware of culturally loaded terms**, “trust”, “partner”, “ budget”, “staffing”, “collaboration”, “friendly”
 - Terms have different meanings in different cultures
- **Non-Verbal Communication is culturally determined**
 - Physical distance between people, facial expression, gesture, eye contact, physical contact, volume, meaning of color
- With Multi-cultural teams
 - Complexity increases
 - Negotiation becomes unwieldy

Optimizing Virtual Team Performance

- Have periodic face-to-face meetings **if at all possible**
 - Initial face-to-face startup meeting
 - When resolving conflict
 - To maintain team cohesiveness
- Use groupware **for knowledge sharing**, relationship building
 - Mgmt must create an environment to support relationships, not just to exchange information
 - Utilize video and teleconferencing, teamrooms. Make knowledge explicit
 - New hires used to facebook,myspace and other more personalized electronic tools **but use caution**
 - **Don't let team members vanish** – Use a group calendaring tool or other accepted way of notifying when members will be out of the office
 - IRC Channels, bulletin boards/chat tools
- **Establish clear expectations for behavior/codes of conduct**
 - e.g. Return high importance calls/email within 12 hrs to avoid communications delays
- Failure to perform is often the result of feeling excluded
- Make the whole visible to everyone
 - Team collage w/photos; Map with locations/timezones of members
 - Project schedules, goals

Optimizing Virtual Team Performance, cont.

- General Communications
 - **Create “think time”** so team members can digest info
 - Give team members a sense of how the overall project is going, i.e. **keep the project visible**
 - **Amplify energy** – “hot news”, celebrate accomplishments, find ways to spotlight individuals
 - Imply intent in email, e.g. with the **use of emoticons**
 - Augment text-only communication with graphics/images to mitigate limited human/social cues
 - Differing time zones, busy team members and technology may cause communication delays
 - Recognize that most communications will be non-verbal
 - **use caution in tone and language**
 - **be forgiving**
- **Create artifacts** (team logo, specific team format for outputs)
- **Periodically, assess how the team is functioning** and if anything is interfering with it's effectiveness
 - Early detection of problems = early solution of problems
 - Lessons learned

Optimizing Virtual Team Performance, cont.

- Project Management Processes Vital
 - **Team members must keep timelines/deadlines**
 - **Sizing Skills**
- Team Celebrations/Virtual Get-togethers
 - Distance increases focus on task; decreases focus on social...and teamwork is social!
 - Use IRC/Sametime
 - Peer manager could adopt remote employees
 - “Getting to Know You” or other team email activities
 - Publicly recognize/award performance (teleconference, local area meetings)
 - Invite experts to engage or present to the team via net-meetings
 - Team Yearbook/Mug book
- Virtuality requires trust
 - “If we are to enjoy the efficiencies and other benefits of the virtual organization, we will have to rediscover how to **run organizations based more on trust than on control**. Virtuality requires trust to make it work: Technology on its own is not enough.” Charles Handy, an author and management consultant.

Agenda

- It's a Brave New World
- Skills for Effectiveness
- Additional Hints and Tips
- **Conclusion**
- Checklists/Behavior Framework
- Resources

Conclusion

New World = New Skills

Create a PROJECT CULTURE

Communication

Build your Cultural Intelligence; Be Curious about Culture

Constant adaptation and compromise is necessary

- Hold lessons learned sessions; make constant iterative improvements

Team building / Diversity or intercultural training

The “soft stuff” is the “hard stuff” and “important stuff”

Why is it important? Can gain large increases in productivity!

Agenda

- It's a Brave New World
- Skills for Effectiveness
- Additional Hints and Tips
- Conclusion
- **Checklists/Behavior Framework**
- Resources

Checklists for Virtual Team Leaders

-DO NOT

- Deliver bad news over email
- Use American colloquialisms with foreign nationals, especially in email
- Assume that once an email is sent, it will be read and understood
- Expect position power to lead to successful influence over distance
- Relate information only one time and in only one way
- Always travel to remote sites or expect remote individuals to always travel to headquarters
- Allow formal rewards to be the only type of rewards (i.e. no informal recognition or praise)
- Disclose pertinent info to local individuals before distanced individuals
- Dismiss ideas because they were “not invented here”
- Use email to discuss emotionally-charged issues (e.g. disagreements, conflict)
- Assume that meanings are shared
- Allow email interaction to replace telephone/teleconference interaction entirely

Checklists for Virtual Team Leaders

-DO

- Devote time to developing relationships with those at a distance
- Communicate face-to-face at the beginning of a relationship
- Learn to ask open ended questions to allow better information flow
- Make periodic visits to remote sites
- Engage in small talk in F2F **and** in electronic exchanges when appropriate
- Regularly distribute company or area wide info to remote employees, e.g. via a virtual newsletter
- Be conscientious about giving praise in a timely manner
- Make sure local mgmt is aware of recognition/praise that is given to remote/virtual employees
- Be an advocate for remote employees
- Discuss expectations for performance and for communication overtly and often with remote employees
- Give and solicit feedback from remote employees on a regular basis
- Ask distanced employees how relationships with them can be better
- Provide an agenda to all parties in advance of a meeting, i.e. provide “think time” < and >; Discuss meeting etiquette
- Solicit input from all team members before, during, or after a meeting
- Follow up all important email messages with a phone call

Behavior Framework for Virtual Teams [10]

- Be aware/accepting of cultural differences
- Allow for team socializing/informal chat
- Reward good behavior in a cultural sense
- Avoid slang/colloquialisms/jargon/acronyms
- Use simple language
- Avoid metaphors
- Avoid humor
- Keep to the point
- Confirm understanding by asking open ended questions
- Reiterate key points
- Use follow-on emails for feedback
- Formulate criticism/praise carefully
- Speak slowly/clearly
- Acknowledge/invite each individual to speak
- Allow for “think time” between responses
- Alter tone of voice (do not be too abrupt)
- Write from the receiver’s point of view
- Be more descriptive
- Use lists/points
- Change between formal and informal writing
- Consider religious holidays when scheduling meetings and deadlines
- Allow extra time for time zone differences
- Attempt to schedule meetings during work hours
- Rotate meeting times to share the burden of after-hours work
- Initial team face-to-face if possible
- Initial team video conference if face-to-face not possible
- Put team member photos on a website
- Rotate face-to-face meetings in different locations

Agenda

- It's a Brave New World
- Skills for Effectiveness
- Additional Hints and Tips
- Conclusion
- Checklists/Behavior Framework
- **Resources**

Questionnaire Example

Getting to Know You....Getting to Know All About You...

- What was the last book you read for fun (do *not* include any technical journals please!)?
- What is your favorite song/piece of music?
- Do you have children? If so, what are their ages? (Go ahead and brag about them!)
- Do you have pets?
- What does your spouse/partner do (if you have one)?
- What is your favorite sport to play? to watch?
- What was your first job at IBM?
- Beer and Pizza? Wine and Cheese? or Diet Coke and Twinkies?
- What was the most interesting job you had before IBM or in college or high school?
- How many siblings do you have? What do they do? Are you first born, middle, or baby?
- Hobbies/Volunteer Work/What do you do in your spare time? Think back on a time when you actually had spare time. :-)
- What was your best vacation or what is your dream vacation?
- What is your favorite color?
- Favorite TV show (s)?
- Type of car you drive?
- Sunrise or Sunset?
- Brush with death or harrowing adventure?
- What do you want to be when you grow up?

Resources

1. Going Virtual by Ray Grenier and George Metes, published by Prentice-Hall
2. Charles Handy's article "Trust and the Virtual Organization" Harvard Business Review (May-June 1995).
3. Virtual Leadership: Leading Dispersed Teams, John Daly, Ph.D., Deirdre Mendez, Ph.D, Texas Executive Education, McCombs School of Business, UT Austin
4. www.knowab.co.uk/wbw2c.html
5. www.seanet.com/~daveg/ltv.htm
6. www.charityvillage.com/cv/research/rtech7.html
7. Managing Virtual Teams, Text of Speech given by Lisa Kimball, Team Strategies Conference, 1997
8. Virtual Leadership by Jaclyn Kostner, Ph.D., published by Warner Books, 1977
9. Boundaryless Facilitation, Amy Eunice, Trish Silver, Nedra Weinstein of Catalyst Consulting Team.
10. Challenges Facing Technical Leaders on Virtual/Global Teams, Kitty Pearsall, PhD. IBM, October, 2006.