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# Introduction

## PURPOSE

This section provides you with basic information about the Leading Virtual Teams course.

## LEARNING OBJECTIVES

At the end of this course, you should be able to:

- Gain clarity on the key concepts to successfully managing a virtual team.
- Understand how to increase productivity on virtual teams.
- Understand how to increase team cohesion.
- Decrease miscommunication or non-communication between team members.
- Improve relations on the team.
- Understand the keys to communicating virtually.
- Understand how to increase trust on a virtual team.
- Understand how to motivate and recognize employees on a virtual team.

## PARTICIPANTS GUIDE

This *Workbook* is your tool. Use it during the training and as a refresher thereafter. There is a lot of white space, so that you can make any notes you think appropriate.

This workbook contains:

- Copies of all visuals, many with explanatory text.
- Exercises and team activities.



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# The Virtual 6

## VIRTUAL 1: BUILD A STRONG TEAM, STARTING WITH YOU

### Words of Caution

- **Leading a virtual team is not for \_\_\_\_\_.**  
A virtual team is not the type of team that can be managed by a first time manager. First time managers need to be concerned about being a great manager. There is enough to learn without the added issues of virtual teams. Virtual managers should be seasoned and have a great reputation in the organization.
- **You have to be successful as a \_\_\_\_\_.**  
Since virtual leaders do not have time to build a reputation in the organization, they should be known as successful prior to becoming a virtual team manager/leader. Some very strong managers can be successful. For the most part though, good virtual leaders must be a known commodity so that the people they are managing can find out about them. It is also important because most work virtually is done through relationship. A manager with a good reputation can get more accomplished.
- **You have to be willing to be \_\_\_\_\_.**  
Virtual leaders cannot be inflexible. Virtual leaders need to be able to work with many different types of people and accommodate many different working styles. Successful virtual managers need to be willing to try new things and know how to get something done.
- **You have to be \_\_\_\_\_ not seeing or hearing from your direct reports.**  
Virtual leaders may not hear from their direct reports for days a time. There may be cases when you may not see their direct reports. You must be creative in getting status reports and learning about progress. As a virtual leader, you cannot command your team. Everything you do is a collaborative effort.
- **You have to manage to \_\_\_\_\_.**  
Virtual leaders must manage by results, both in terms of project results and how customers are dealt with. There is no other way to gauge the success of a virtual team member. Objectives must be clear and agreed upon between manager and employee. Virtual managers cannot go on personality or how much they like people. This cannot really be gauged virtually.
- **You need to understand how to \_\_\_\_\_.**  
Virtual leaders must be masterful at motivation. This means they must know their people exceptionally well. They must understand what incites their team members to go the extra mile.
- **You are the source of \_\_\_\_\_ on your team.**  
The team will follow the virtual leader's path. If you establish a high level of trust and integrity, they will engender that with their team. Team members will look to the leader provide a gauge of trust.

## Successful Leader Characteristics

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A remote set-up won't work unless your employees are motivated and running in sync -- collaborating, asking each other for help, sharing ideas. That energy has to start with you. You don't need to start each day smiling from ear to ear, but if you're annoyed every time an IM breaks your train of thought or you're not good about remembering to check in with people, running remote teams probably isn't for you.

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Good remote communication requires extra effort. You need to go out of your way to address issues that would come up naturally and spontaneously if you all worked in one place. When your staff is spread across a number of time zones, they need to feel comfortable calling you at odd hours -- even if it's dinner hour. Beyond the guidance or answers you can provide, which allows them to move forward with their work, your availability shows support, which helps strengthen your relationships with everyone. With that said, establish reasonable guidelines about when to call.

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A two-hour dinner with an employee across the country may take up two days with travel time. And it may take two hours instead of 10 minutes to schedule a conference call. The lesson here is: Budget extra time for common group tasks. This doesn't necessarily hurt productivity. For instance, conference calls are usually shorter and more to the point than a meeting in person, where members of the group are bound to do more small talk.

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By doing what you say you'll do -- whether it's helping solve a problem or sending a new laptop -- you foster trust. Your reliability shows respect for what your workers are doing. Without that, they may quit asking for help, and you'll fall out of the loop. "Trust is particularly important in distance relationships," says management consultant Debra Dinnocenzo, author of [How to Lead from a Distance](#). "You build trust through actions that demonstrate reliability, integrity, and familiarity."

## Development Cycle: A New Model of Team Development

Most of us are familiar with Tuckman's model of team development which incorporates the stages of forming, storming, norming, performing, and adjourning. Virtual teams require a new model that accounts for the complexities of their work environments. The following model, adapted from J. McGrath, addresses both task performance and social dynamics, arguing that both work together to create the team experience.

### Definitions of the stages are as follows

- **Inception** – Team is newly formed or has added a number of new team members. As the team moves through this phase, they will be establishing goals, plans, norms, etc. Leaders can move this along by clearly defining roles and working on team member inclusion. This can be closely linked to forming of a team, but long established teams can find themselves in this phase after a reorganization or the addition of just one or two team members.
- **Problem Solving** – In this phase, the team is moving from solving problems with known answers to bigger, less well defined issues – i.e. employee attrition. As processes become better defined, virtual teams tend to work on more strategic than tactical projects. Leaders can move teams through this phase by further enhancing roles and driving structured team processes.
- **Conflict Resolution** – It is inevitable to have conflict on the team. Without it, there is no learning. Leaders of virtual teams must act as arbiters to ensure that the conflict is resolved expeditiously and completely. We will discuss conflict resolution in upcoming sessions
- **Execution** – In this phase, the team is working well together. They are able to complete tasks with little dissent or disharmony. In order for leaders to get and stay here, communication practices must be well defined. Also, customer expectations have to be managed by the manager and team.

Stage	Description	Task Activities	Description	Social Activities
1	<i>Inception</i>	<ul style="list-style-type: none"> <li>▪ Select goals</li> <li>▪ Generate preliminary plans</li> <li>▪ Generate ideas</li> </ul>	<i>Interaction / Inclusion</i>	<ul style="list-style-type: none"> <li>▪ Ensure team member inclusion</li> <li>▪ Ensure opportunity for participation</li> <li>▪ Define initial roles</li> </ul>
2	<i>Problem-Solving</i>	<ul style="list-style-type: none"> <li>▪ Select technical problems to be resolved</li> <li>▪ Solve problems with correct, known answers</li> <li>▪ Solve ambiguous problems</li> </ul>	<i>Power / resource allocation</i>	<ul style="list-style-type: none"> <li>▪ Address status of team members</li> <li>▪ Clarify and refine roles and expertise</li> </ul>
3	<i>Conflict resolution</i>	<ul style="list-style-type: none"> <li>▪ Resolve conflicts about different points of view</li> <li>▪ Resolve conflicts stemming from different interests</li> </ul>	<i>Position status / role definition</i>	<ul style="list-style-type: none"> <li>▪ Address power differences between team members</li> <li>▪ Address interpersonal relationships</li> <li>▪ Address how different solutions affect power allocation to different functions, regions, and/or countries</li> </ul>
4	<i>Execution</i>	<ul style="list-style-type: none"> <li>▪ Perform tasks</li> <li>▪ Address organizational barriers to performance</li> </ul>	<i>Interaction Participation</i>	<ul style="list-style-type: none"> <li>▪ Ensure equal participation</li> <li>▪ Ensure effective interaction and communication</li> </ul>

## From Control to Collaboration

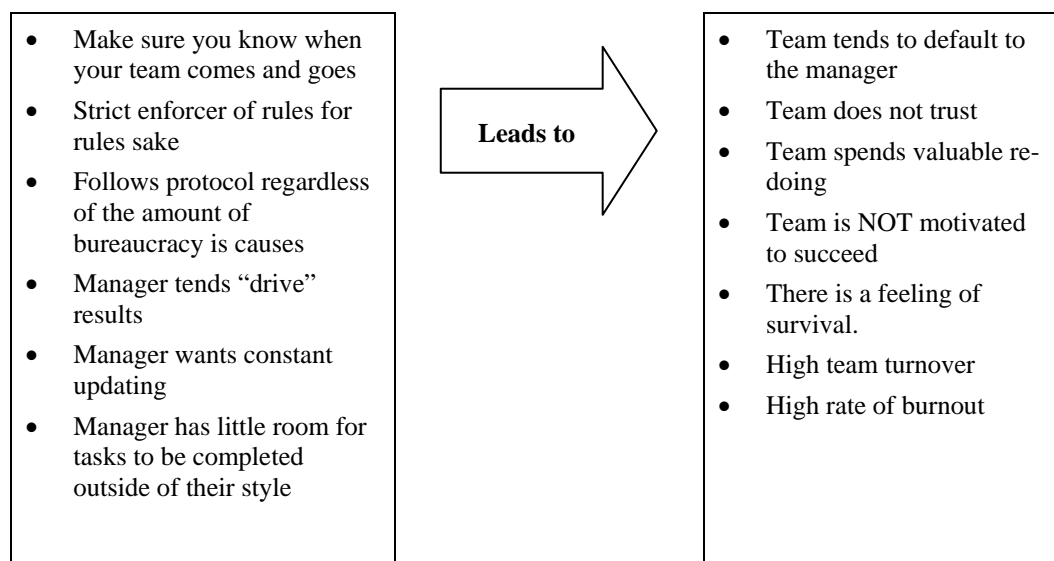
Gone are the days when employees blindly follow a manager. High performing teams are made up of capable, competent people that take pride in doing great work. As a manager of a face-to-face team, although not recommended, you can watch and “manage by walking around.” You can check up on people, make sure people are following protocol and force the team to interact through meetings, lunches, etc. But that is impossible and counterproductive as the leader of a virtual team.

As the manager of a virtual team, you must become adept at driving results through collaboration. If you do not, you will fail.

### Controlling Style

It is very easy and tempting to fall into a manager that wants things to be a certain way to drive results. This stifles creativity and will kill a virtual team. Drive towards the following:

Controlling style of management can get things done, but at a cost.



Or you can take a big step in creating a high-performance team and driving results. Sometimes things can seem to take longer, but the end product is usually higher quality.

## Collaborative Style

- Manager sets core work hours or establishing an expectation that hours are flexible as long as deadlines are met or exceeded
- Manager enforce rules, but isn't afraid do things out of the norm to produce big results
- Manager encourages team to make things happen and isn't afraid to not fail
- Manager facilitates meetings
- Manager wants to be updated, but encourages brevity
- Manager has little room for tasks to be completed outside of their style

Leads to

- Team members are independent, but hold each other accountable
- Team trusts each other
- Team drives toward 90% completed/perfect to ensure things get done
- Team is very motivated to succeed
- There is a very long term view on the team
- Managers must ask for input on processes
- Teams have to be self-reliant on getting things done
- Managers have to rely on their teams to hold teammates to account
- Fun on the team

Being collaborative does not mean you should not drive to get things done one time and under budget. It does mean that you encourage participation, instills a sense of ownership of the project/task/decision, and increases the end result!

## VIRTUAL 2: CREATE A HIGH PERFORMANCE VIRTUAL TEAM

A dispersed team depends on people who can be productive without a boss roaming the hallways or a trusted co-worker sitting nearby. Team members should be motivated, disciplined, and flexible with their time, allowing them to connect with clients or co-workers in different time zones.

“People who like to quit at 5 p.m. aren’t the people who work well remotely,” says Michelle LaBrosse, CEO of Cheetah Learning, a project-management training company based in Carson City, Nevada. They also need to communicate clearly in writing (since e-mail and instant messaging are the new standard for daily communication) and should be willing to suggest ideas, ask for and offer help, make decisions, and collaborate.

Below are a few suggestions for setting up a remote work arrangement.

### **Assess, Coach and Develop from Afar**

Unless you are going to be flying every week, it is vital to learn how to develop your team from afar. As has been stated before, managing a virtual team is much like a “co-located team.” The difference when it comes to development is that leaders must be more communicative and likely take on some of the administration. The keys to ensuring success in “developing from a distance” are:

- Know your people
- Motivate your team
- Conduct regularly scheduled status meetings
- Conduct quarterly reviews
- Hold Performance Evaluations in person

### **Know your people**

A virtual team allows the potential for deeper and better relationships with your employees. Research finds that people are often more honest and forthright with people that they will seldom see. More than likely, employees are interested in providing you with information. However that may require some work on your part. In a later section, you will work on determining their communication preferences. Prior to doing that, you must find out what makes them tick in order to gain their trust and loyalty. Speak with each member of the team to find out the following:

#### ***What motivates them?***

Each person is motivated by something unique to their personality, lifestyle, interests, etc. Motivation is defined as the reason why people want to do something. If they have motivation, you do something because you want to do it -- and not because you have to do it. Motivation is the energizer of behavior and mother of all action.

Your job as a virtual leader is to work with the folks to find out what motivates them.

***Why do they love their jobs?***

Everyone has a reason why they started their jobs. Most people don't pick a job they will be miserable doing. The leader should know what their team loves about their jobs. This way they can give the team more assignments that keep them interested and motivated to do a great job and stay with the team/company.

***What do they want to do with themselves?***

Often employees are motivated by the opportunity for career advancement or the opportunity to learn a new skill for a future endeavor. As a leader, you want to know your team member's aspiration, inside and outside the organization. Then you want to try to gear assignments/projects to help them closer to their goal.

***What do they do outside of work?***

As the leader of any team, but especially a virtual team, you should know what interests your team members have outside of work. Do they have a family? How old are their children? What are their kids involved in? Do they belong to a social organization? Are they involved in local politics? There are a thousand questions you can ask. Knowing about their lives outside of work helps to know how to reward them, the kind of skills that they bring to a project and what assignments might be interesting to them.

**Reward, Recognize, and Motivate**

Once you know what motivates your team, then you know how to adequately reward them for doing great work - Giving them a day to spend with their children, dinner with a spouse, tickets to a movie, etc. Part of knowing what motivates team members is understanding what they consider a great form of recognition. In order for recognition to be meaningful, it must be both timely and personal. Knowing what they love will allow for it to be personal.

Recognition should be commensurate with the task. Know what is great recognition for each team member for various levels of accomplishments from small to very high-impact/visibility.

**Conduct weekly status meetings**

- Always have time for "how are you doing" conversation.
- At a minimum, team leaders should be speaking to each member of the team once per week. In order to fulfill on all the deadlines for your team, the leader must converse with each team member about progress, issues, etc.

**Hold quarterly performance reviews**

In order to ensure that there are no surprises or new risks, leaders should set aside time for each employee to have quarterly performance conversations. These should be used focused solely on performance results not monetary, unless it's required. The information gathered should feed into the annual PE.

- What are they doing well?
- Where are opportunities to improve?
- Gather input from clients/customers/team.

**Hold annual performance evaluations in person**

Performance evaluations will be discussed in later sections. Suffice it to say that PEs should be conducted in person. It increases the chances that the PE will have the desired impact.

## **Establish Standards and Objectives**

Managing a virtual team is similar to managing a “same place” team. The biggest difference, with the exception of the team not being co-located, is that everything needs to be much clearer. Members of the team must know what they are expected to do and what will constitute them being successful.

Of course, it is vital that you create SMART objectives for your team to follow and meet.

- S** Smart
- M** Measurable
- A** Attainable
- R** Realistic
- T** Time based

If they are not, it may quadruple the time it takes to complete the employee’s review. Without clear objectives, the chances of disagreement or differences of interpretation with the employee are greater.

**Tip:** Encourage your employee to write the first draft of their objectives. Use this as a “coachable opportunity.” Once the employee has taken the first stab, review them together. Come to an agreement about each one. As the leader, you should take on making the final corrections. Circle back with the employee to get final confirmation. Now use these objectives throughout the year. This way you both know what you are working to achieve.

## **Match People to the Work**

Extroverts and idea people tend to like tasks that require frequent and ongoing communication. Make sure they’re in an office with teammates they can collaborate with. Introverts and confident people making decisions can work more easily at home or on solo projects.

### **Assign backups**

For the most critical tasks, make sure you or someone else in your group can fill in on a moment’s notice, like when someone is ill or quits. (And make sure you can access a remote worker’s files and contacts from afar.)

## **Match Work to the Time Zone**

If some employees are working while others sleep, try to avoid assigning work that leaves team members perpetually in the hurry-up-and-wait cycle, as their counterparts half a world away complete their part of a project.

## VIRTUAL 3: BUILD A SENSE OF “WE” ON VIRTUAL TEAMS

### **Team Fears**

#### **Isolation**

One of the top five fears that virtual team members experience are that they’ll feel isolated from their teammates. At the same time, of the top five fears that virtual team leaders have is that they won’t be able build a sense of team.

#### **Alone**

Unfortunately, virtual team members often feel as though they’ve been cast off from the “mainland.” Perhaps a team leader forgot to tell them about the different meeting time this week. Or maybe they were left out of the loop regarding a critical aspect of the project. Or possibly, they sent the team leader or a team mate a week ago and still haven’t heard back.

#### **It’s up to the leader**

Just one or two careless or thoughtless actions on the part of a team leader can result in virtual team members feeling isolated.

It’s up to the team leader to be proactive and show that communication with team members - eliminating feelings of isolation – is a priority. Two ways to ensure inclusion are:

- Sharing information
- Maximizing interactions

### **Sharing Information**

Sharing information is a great way to encourage team cohesion, increase trust and reduce the feeling of isolation. Make a habit of keeping everyone on the team informed about pertinent conversations and updates, and get other team members into the habit of doing so. Some examples of methods are:

- Sending all non-confidential e-mails to the entire team
- Developing and maintaining a lessons-learned database
- Seeking input from all team members before making decisions

### **Maximize Interactions**

Take the time to plan regular get-togethers (face to face and virtual) that are interesting, thought-provoking, and interactive. Team members should leave these meetings feeling that they share a unique bond with their teammates. Use the table below to help maximize interactions.

<b>Ways to Maximize Interactions</b>	<b>Examples</b>
Creating themed meetings	Center a team meeting on an ocean metaphor.
Asking customers to share the impact of your product or service	Customers tell the team about ways the service/product saved time/money.
Adopting an interview format	Act as a talk-show host and conduct interviews with experts (internal to your team and external).
Showcasing employees who work to make a difference	Team members tell success stories that relate to their team.

## Understanding Personal Preferences

As a team leader, you can be proactive about banishing feelings of isolation that your team members may experience. One way to do this is to create a customized connection strategy for each person on your team. The goal of this strategy is to build strong, interpersonal relationships with each of your teammates in ways that respect each person's communication preferences.

You will want to know the four communication keys for each person:

- Frequency
- Duration
- Content
- Media

Obviously, it's going to take you more than just a few days to create a connection strategy for each person on your team. It can take up three months to create a highly effective strategy to use with each virtual team member. Don't rush it, the investment is worth it!

<b>Parts of a Connection Strategy</b>	<b>Questions to Ask Yourself</b>
Content	What will my conversations be about with this person?
Media	What method of communication does this person seem to prefer
Frequency	How frequently does this person need communication
Duration	How much time should I spend during a typical interaction with this person?

## Trust on a Virtual Team

Although trust is paramount to success on any team, it is even more important to establish a high level of trust when team members cannot see or be with each other frequently. As the leader of the team, you cast a long shadow when it comes to fostering a trusting environment on the team. If you actively promote and encourage a trusting environment, your team will be even more productive and effective. There are some important team processes every successful virtual team establishes to foster trust and avoid confusion. As the leader of the team, you must facilitate these conversations.

TIP - As a special meeting every other week, address each of these topics. Below we will review the definition of each. After which there are sample agendas to utilize for the conversations.

### How to hold each other accountable

- Accountability has many meanings. It can be something related to productivity or even owning up to one's actions. Those are not very powerful in the context of a team. For the purpose of virtual teams, let us define accountability as follows:
  - Accountability redefined: An attitude of continually asking what else can I do to achieve the results I desire? It includes making, keeping and proactively answering for personal commitments. It is a perspective that embraces both current and future efforts rather than reactive and historical exploitations. In other words, focus on today and tomorrow, not what happened.
  - Suggested conversation regarding "How to hold each other accountable or team accountability."
    - Pre – work:
      - Send agenda out prior to the meeting.
      - Craft a draft definition of accountability.
      - Ask each team member to come up with their own definition and how to measure it.
    - Day of the conversation:
      - Using webcast technology every person posts their definition of accountability.
      - Have each person present each definition.
      - Discuss each definition and determine which to use or how to combine them to have one. Come to consensus.
      - Define three new terms to assist in the conversation:
        - Interdependence – the paradigm of we – we can do it; we can cooperate; we can come out talent and abilities and create something greater together.
        - Seeking Feedback – Actively looking for candid, open perceptions about performance.

- Acknowledging what is so – ability to readily acknowledge reality, including all its problems, challenges and opportunities.
  - Brainstorm on how the team can become more interdependent. What could you do to leverage each other even more without being a burden?
  - Vote on the top three, discuss methods to ensure that you are actively using them, and how to measure those. Make this a topic of your regular team meeting calls.
  - Set the criteria, boundaries, limits to inter-team feedback. Establish one meeting as the candid feedback meeting.
  - Establish practice to gather feedback from customers/users and report back to team.
  - Come to an agreement regarding acknowledging what is so, for example – don't just tell me what is wrong; help me make it better, or don't tell me that it's raining; tell me how to build the ark.
    - Document these agreements and revisit them often. Post them on your website or document repository.
    - Make sure you are a part of the initial feedback gathering sessions.

### **What to do about missed deadlines**

Missed deadlines link to a team's reputation and can damage credibility throughout the organization. The scrutiny on deadlines is even higher when it comes to virtual teams. However, there is a tendency to make statements like "We just won't miss any deadlines." Unfortunately due to fast paced nature of business, that is not viable and would cost more than its worth. Therefore your team should come up with contingency plans to manage missed deadlines. This "banding together" has shown to engender trust and increase productivity. Here is a sample team meeting you could follow:

- Pre – work:
  - Send agenda out prior to the meeting.
  - Ask each team member to come up with their own idea of what to do about missed deadlines.
- Day of the conversation:
  - Discuss how a missed deadline could occur. Have each team member discuss.
  - How will you deal with a teammate that missed or his/her actions that led to missing the deadline? What will be your tactic to recover?
  - How will you communicate to the organization?
  - What will the team do to ensure customers/clients can be alerted ahead of time?
- The objective of this conversation is not to go into panic, but to establish a few keys:
  - It is okay for people to fail on the team, not repeatedly or from neglect, but failure is one of the fastest teachers.

- Everyone on the team must be willing to step up when the team needs them.
- Trust amongst the team is paramount.

### **What will be the process to update each other on progress?**

Communication in any relationship is critical, but even more so when you cannot see each other face to face. It is vital that the team be thinking about how they will keep each other updated on progress of projects, initiatives, conversations, and goals – team and individual. Of course this starts with the leader of the team. The leader of the team must think through what is the most efficient method to ensure that all team members are aware of their team mate's progress. In a virtual team, the final update process must be the teams. Another conversation to drive trust in the team is about team accountability and buy into an update process.

**Word of caution** – Effective leaders know how their teams might react to these conversations. Make sure you take the experience level of your team into consideration. Very experienced members will likely need a shorter, more direct conversation, while less experienced employees might need a more regimented or structured conversation.

- Pre – work:
  - Send agenda out prior to the meeting.
  - Include in the agenda a draft version of update process you have created.
  - Ask each person to prepare ideas or a process to keep each other updated. Encourage them to reach out to each other prior to the meeting.
- Day of Conversation Topics:
  - Discuss why the team believes it's vital for everyone be informed of progress on the team.
  - Have each person present their process or ideas for updating each other on progress (someone should be acting as scribe for this conversation).
  - Team comes to consensus (through voting or other method) on which process is best and by when they will start utilizing it.
  - Anything created as a result of this conversation should be sent to the entire team to begin the practice.

Clear, honest, and unambiguous communication leads to action.

### **How they will deal with conflict**

Conflict on any team is inevitable. It can be both vital to the team's development and disruptive to team progress on the other. As the final method to build trust, it is critical that the team has a robust conflict resolution strategy and can begin to leverage conflict to further progress. Conflict can have negative effects on a team when the conflict is repressed or avoided.

These effects include:

- Dividing the team into factions
- Wasting valuable time

- Distracting team members from important priorities
- Damaging the way the team is perceived by other teams, customers, stakeholders
- Creating defensiveness
- Hampering information flow
- Blaming
- Refusing to collaborate or cooperate

### ***Develop Team Guidelines for Addressing Conflict Situations***

It is essential that your team reaches agreement on some guidelines for addressing conflict situations.

These guidelines fall into three categories:

1. Determining when the team needs to get involved.
2. Determining how to get involved.
3. Determining a specific process for resolving conflict.

Teams should not try to assume responsibility for resolving all conflicts which occur among team members. When two team members experience a one-on-one conflict, they should be encouraged to resolve that conflict between themselves. This should be the primary approach for one-on-one conflicts, and in most cases, this should resolve the situation.

So what circumstances would make it advisable for the team to get involved in addressing a specific conflict situation?

- When the conflict affects the performance of other team members
- When the conflict jeopardizes achievement of team goals
- When the conflict interferes with team communication.
- When the conflict overflows external to the team.
- When the conflict has gone on for some time, involves some repetitive pattern, shows no signs of improvement.

The key to resolving conflict effectively is to have a process for each team member to follow. One of the main ground rules for effective conflict resolution is to keep emotion out of the discussion as much as possible. Here is a five step process each team member can use to work through the conflict:

**Step 1:** Describe the conflict in neutral terms. What exactly is the issue? Describe it without including any inferences or assumptions.

**Step 2:** Identify critical needs and concerns. Identify what each team member needs to resolve the conflict. List any concerns.

**Step 3:** Develop alternatives to resolving the conflict. Through discussion and active listening, brainstorm possible alternatives all members can live with.

**Step 4:** Evaluate solutions to determine a win-win outcome(s). Using the items identified in Step 3, evaluate those that will have a win-win solution for each team member.

**Step 5:** Establish an action plan to implement solution(s). Put it into action! The conflict will continue until action is taken to create a different outcome.

### **How They Will Celebrate Successes**

Accomplishments must be acknowledged and celebrated, as a group when possible and appropriate. There are literally hundreds of ways to achieve this.

- Take the time to create a periodic newsletter and email or post it; be sure to have a section in it for accolades.
- Institute a peer-to-peer award system.
- Send virtual greeting cards or gift certificates from any of the dozens of websites dedicated to these purposes.
- Send them each a jar of jam when you reach a milestone.

However you do it, just make sure you do.

## VIRTUAL 4: MANAGE VIRTUAL TEAMS BY RESULTS

### **Focus on the Quality of Your Employees' Work, Not Their Style of Doing It**

The nuances of how people work, and when, become more pronounced when you're remote, but they're not a good basis for performance evaluation. Forget points of style — how long it takes an employee to reply to emails, for example — and focus on the results: both tangible and intangible. Tangible results might include the proposal an employee submits for next quarter's operating plan and whether it's comprehensive, on target, and on time. The intangibles are just as important: whether she collaborates well, makes decisions on her own, delivers what she promises, anticipates problems before they happen, generates ideas, communicates clearly, takes responsibility for her work, and goes beyond the call of duty, say to help a new co-worker get up to speed on a client.

### **Set Goals and Expectations**

Set expectations and goals and put them in writing. Lay out requirements for the job and the relative importance to you and the company of meeting deadlines versus producing quality work, or giving a client what he wants versus the cost to your organization of giving it to him.

### **Take notes**

Jot quick anecdotes about each employee's performance, positive and negative, every few weeks. Your notes become a starting point for the next performance review.

### **Require reports**

When work has a lot of variables (clients, contact with the media, etc.), reports give you a glimpse of how workers are spending their time. Orsini of Corecubed doesn't expect people to be at their desks 9 to 5, but since her company bills clients for time, she asks employees to track their hours and estimate percentages of time spent on types of tasks.

### **Ask Detailed Questions**

The more you talk to *everyone*, the better sense you'll get for whether each person on the team is playing the role they need to. But don't ask Eric if Andrea is doing her job well. That puts him on the spot. Ask specific questions about the project they're both working on -- which tasks he and she are working on this week and what challenges they're having -- to get clues about her role.

### **Evaluating Performance**

#### **Use Statuses to Define Accomplishments**

Status meetings and reports give a great opportunity for leaders to record progress, issues and successes with agreed upon objectives. Statuses are the best time to deal with performance issues and give coaching. Do not wait until the annual performance evaluation (PE) to confront or mention issues. The annual PE is the time to report on performance against an agreed up set of goals. Use the regular time you have with your employees to gather this information. Once you have this information, you can easily report on their performance.

Ensure your status reports are complete, accurate and tell you everything you need to know about the project, objective or issue.

A template for a comprehensive status report is located in the appendix.

### **Using the PE as a learning tool**

The annual PE is an excellent opportunity to coach, mentor and educate employees in two ways. First, it can encourage them to take their career development into their own hands. Second, it can help employees understand the challenge of leading others and will prepare them for this task.

You can increase your effectiveness and allow your employees to learn by asking them to rate themselves using two lenses. First, ask them to rate their general performance against their objectives. Next, ask them to rate themselves using these three criteria:

- Specific, time-based example of how they met the objective
- What they learned
- How they would be more effective next year

### **Avoid Clichés**

Can you remember sitting at a performance review and hearing your supervisor say things that brought back memories of the lectures your parents or teachers gave you when you were a kid?

Too often, we revert to old, tried-and-true phrases to express ourselves. In other words, we use clichés. When we let this happen, we generally lose other people's attention and cause them to doubt whether we are really attuned to them as individuals.

Here are some of the more common clichés --both negative and positive --embraced by supervisors at performance appraisal times.

#### ***Cliché 1***

"You're not living up to your potential."

*More Personal:* "I was confident that you had enough experience in this area to handle this assignment, Amy. Why do you think you've had trouble getting the work done correctly?"

#### ***Cliché 2***

"You make very good use of your time."

*More Personal:* "I'm pleased with the way I see you organize your workload, Richard. I was especially impressed with how you were able to finish that last assignment without having to work overtime."

#### ***Cliché 3***

"I feel sometimes your behavior is very immature."

*More Personal:* "The way you handled that complaint by Mr. Smith was inappropriate, Sharon. You have to control your temper and concentrate on solving the problem. Instead,

you seemed to take his complaint personally, and you responded defensively instead of helpfully."

## VIRTUAL 5: MASTER THE ART OF VIRTUAL COMMUNICATION

### **Virtual Communication – Art, Science, and Nuances**

One of the most fundamental differences between collocated teams and virtual teams is that in face-to-face situations, the sender is in control of the communication. But in a virtual environment, the receiver is the one with control.

Many virtual team members have a hard time adjusting to these new dynamics. And, unfortunately, some take advantage of it. That's why it's important to establish rules about acknowledging communications.

Establishing acknowledgement standards of virtual communications is a three step process:

1. Seek consensus on acknowledgement times.
2. Have team members list their preferences for receiving communications.
3. Post everyone's preferences and turnaround times.

It is vital that everyone on the team agree to the standards. That way, each team member will be more likely to apply the standards regularly and consistently.

### **Create/Start with Standard Operating Procedures**

Communicating effectively can be challenging when you work in the same location with someone. When you add to the mix that virtual teammates rarely work together face-to-face, a whole new host of potential problems come to light. One of the key ways to prevent communication problems is to establish communication standards.

### **Context is Critical**

Communicating virtually can be quite challenging. A sender may think the message is clear, or that a certain emotion is obvious. But the receiver may not understand what is being said, or may misinterpret the expressed emotion.

Oftentimes, the problem is a lack of context. Context is a frame of reference. Participants in conversations tend to seek common ground; they want to share an understanding of one another, the situation and the subject. All too often, improperly used virtual communication tools can alter, diminish, or eliminate the context that people instinctively strive for.

By establishing communication standards, your team can increase the level of context in its virtual interactions. Two tools often misused with regards to context are e-mail and teleconferencing.

### **Establish a Routine**

Communicating virtually can be rife with problems. As the leader, you have to help your team prioritize communication – establish a communication routine.

Teach your team to take two steps for prioritizing virtual communication:

- Identifying the Communication Type

- Acting on that Communication

### Communication Type

The first step is to identify the communication type. Communications can be classified as one of four types: important and urgent, important but not urgent, urgent but not important; not urgent and not important. Two factors are presenting all four types – urgent and important. These two factors define every virtual communication.

- A communication that is **urgent** requires immediate attention.
- A communication that is **important** contributes to the team’s mission, goals or values.

### Acting on the information

The second step is to act on the information you identified. For example, if you’re sending an e-mail or voice-mail message, and it pertains to a training session you’ll be holding next week, you should note the priority of the message in the beginning. Messages of this type will likely fall into quadrant 2 – important but not urgent – so recipients would know that they don’t have to read and respond to the message immediately.

**Note – Quadrant 3 can be tricky** – No one wants to admit that a message is urgent but not important. It’s always important to the sender. However, senders must be objective about its level of importance to the reader. Encourage team members to think objectively and convey the quadrant type honestly.

As a part of your team’s communication routine, try to use the following guidelines:

Communication Types	Priority Level
Quadrant 1: urgent and important	1 (read now) or 2 (read today); no need to indicate that it’s a Q1 issue. <i>For example: an email about a critical quality control issue.</i>
Quadrant 2: not urgent but important	3 (read this week) or 4 (read at leisure); no need to indicate it’s a Q2 issue. <i>For example: an email announcing new health care benefits.</i>
Quadrant 3: urgent but not important	1 (read now) but indicate that it’s a Q3 issue. <i>For example: an email about a late time sheet.</i>
Quadrant 4: not urgent but not important	4 (read at leisure) and indicate that it’s a Q4 issue. <i>For example: an email about a colleague retiring.</i>



## Utilizing E-mail

### Tip Number 1. Have a \_\_\_\_\_ rule.

Procter & Gamble has long-employed the one-page rule for written memos. If you send a memo that is longer than one page, only the first page is read. That forces everyone to make their communication clear and succinct, and to put the most important information right up front. Messages which are brief and tightly focused save time for both the sender and the recipient.

### Tip Number 2. Avoid \_\_\_\_\_ replies.

As one manager in Pioneer Hi-Bred, International aptly put it: “The single biggest improvement we could make in this company to increase productivity would be to disable the group reply button on e-mail!” Using group replies requires an enormous amount of time on the part of the receiver to scroll through the mailing list just to find the message. Using group reply means that countless numbers of people receive copies of documents they may not need, thus clogging the e-mail system with useless information. Or, even more irritating, numerous individuals sometimes even get caught in a written debate in which they have little interest. While there are valid reasons to use a group reply feature, it should be assiduously avoided when possible.

### Tip Number 3. Keep \_\_\_\_\_ up to date.

In a related tip, if you do have to use group replies, make sure that the lists are always current. Sending an e-mail to someone who is no longer on the project team is akin to spamming.

### Tip Number 4. Don't leave \_\_\_\_\_ or \_\_\_\_\_ on e-mail replies.

In those running message types of e-mails that get circulated around from time to time, don't just add comments and then send it on unmodified. Quote only the portions from previous messages that have relevance. If the attachment is no longer useful, delete it. Imagine how much time could be saved if the e-mail world took this counsel to heart. Spending a minimum amount of time on the sending end can save cumulative hours on the receiving end.

### Tip Number 5. Check e-mail \_\_\_\_\_.

This prevents a pile-up of messages and eliminates the tedium associated with reading through thirty or forty messages at a sitting. Furthermore, some issues, when not addressed quickly, can escalate into an ordeal that requires phone calls, teleconferences, video meetings or face-to-face meetings, which can also mean travel time.

### Tip Number 6. Use the \_\_\_\_\_ well.

This allows people to determine the urgency and relevance of an e-mail. Some operations establish a coding system that helps people determine whether something requires immediate attention or not. If you do this, be careful about using obvious words like “urgent.” This and certain other words are being used more frequently by spammers in an attempt to get people to read their e-mails.

### Tip Number 7. Use \_\_\_\_\_ when necessary.

When you're on vacation or can't reply to e-mails for a while, use automatic replies to let everyone who sends you an e-mail during that period know that you won't be able to reply

until you get back. This helps people understand why you let their e-mail sit around for a few days, and discourages them from flooding your in-box with additional messages.

**Tip Number 8. Establish \_\_\_\_\_.**

Consider the types of tips suggested in the following sections, along with your company's corporate guidelines or mandates relative to e-mail use, and then establish team agreements. Knowledge transfer protocols, such as those in Figure 1, can be an effective technique for improving the use and control of e-mail. Protocols help people agree on how to avoid clogging the system.

- Clearly identify the subject of the message in the subject line.
- All e-mail messages must be short (no scrolling required) and to the point.
- E-mail is not to be used for philosophical debates.
- We agree to keep all distribution lists current.
- E-mail won't be used for urgent messages.
- We accept responsibility for a personal delivery (face-to-face or voice-to-voice) or any urgent message.
- To enable message prioritization, we must code the top of each message with either "required action" or "for your information (FYI)."
- We will sign all messages.
- We agree that e-mail is a supplement to, not a substitute for, personal interaction.
- We won't spam.
- We must treat people electronically the same way we would in person.
- Instead of copying long quotes from others, we will briefly summarize them and add attachments, if necessary.

**Figure 1:** E-mail Protocol Examples

When establishing such protocols, keep in mind that e-mail is most helpful for (1) general, non-urgent materials where it is useful to (2) retain documentation, (3) interaction is not required, and (4) security is not important. For instance, one protocol might state that if a message is truly important, it gets communicated voice-to-voice. Or, if it consists of specific material useful to only a few members on the team, then only those people get it. Well-thought-out agreements such as these can go a long way in eliminating the negative effects of e-mail. More examples of standard email practices are in the appendix.

## VIRTUAL 6: PUT TECHNOLOGY TO WORK

### **Technology is Not the Goal**

Technology is merely a means to an end; it is not an end unto itself. Don't allow yourself to be seduced by the latest and greatest. No matter how good a piece of technology is, if it's not going to improve your team's ability to communicate – or worse, if it will impede your communication process – you shouldn't use it.

### **Good Communication is the Goal**

Knowing how to effectively choose and use the right technologies for virtual teams is important because:

- Team rapport increases.
- Team productivity is raised.
- Team results accelerate.

### **Be Tech Savvy**

Beyond the platforms and software your company uses, you need to continually research the newest tools for the sake of efficiency and collaboration often to keep up with what your savvier team members are already using. Maybe they use IM all day long and you like the phone. Yes, you call the shots, but ask yourself what will make your people most productive and satisfied. Maybe it's time you started using IM, too. Ask your peers what they like and what they don't. You can go online to test drive some tools, like Microsoft's SharePoint collaboration software.

### **Groupware**

In the corporate jungle, virtual teams must make the most of the available communication technologies. Groupware is the term used to describe the electronic options available to virtual teams. Groupware can be broken down into two categories: synchronous and asynchronous.

### **Choosing the Right Technology**

There are three steps to choosing the right technology for a given situation:

#### **1. Determine the use - What do you need to accomplish?**

As a team leader, you are going to need to accomplish a lot, and you'll need virtual communication tools to help you. Your uses will most likely include generating ideas, collecting data, addressing problems, and managing conflict.

Uses	Common Actions
Generating ideas and collecting data	Brainstorming, prioritizing ideas, outlining, voting
Addressing problems	Listing, discussing, organizing, voting, prioritizing
Managing conflict	Stating opinions, reaching compromises, settling disputes

## 2. Narrow the list of choices.

### 3. Determine the factors

When narrowing your list of choices, you need to take into account the features of the tools at hand and compare that to your current need. For instance, if you need to ask a team member a quick, relatively uninvolved question, you don't need video capability; e-mail might do. But if you need the answer right away, you might want to use a synchronous tool instead. E-mail interactions are delayed, but synchronous tools, such as electronic chat, allow users to engage in real-time conversations.

All virtual meetings require three types of activities:

1. Selecting the appropriate technology and type of interaction (real time or asynchronous), given the purpose of the meeting
2. Planning for "people issues" (such as who will participate), scheduling the meeting around the availability of the participants, and dealing with meeting logistics
3. Developing an effective agenda and facilitating the effective use of technology

## Matching Purpose to Technology and Interaction

One of the primary determinants in selecting technology is the level of interaction a meeting demands. The purpose of getting people together in a meeting can vary from just catching up to producing deliverables. There are four major types of meetings:

1. **Information-sharing** meetings, in which information is shared and discussed among team members. Such meetings can range from one-way presentations to multiple-path exchanges of information. Examples are regular progress reviews and updates.
2. **Discussion meetings** include the exchange of information and promote dialogue, the generation of ideas or options, and discussion of issues or problems. Such meetings include discussions about technical approaches to problems and discussions about system issues, plans, and policies.
3. **Decision-making** meetings, in which issues are discussed and decisions are made collaboratively. An example is a meeting in which a final decision is made about a project schedule, technical approach, or policy.

4. **Product-producing** meetings, in which "hands-on work" is done and tangible products are produced, such as the analysis of data or work on a document or engineering design. These meetings require the most collaboration.

Categorizing meetings on a continuum of low to high interaction can be useful in deciding what technology would be most effective for a particular type of meeting.

**Table 4.1:** Meeting-Interaction Continuum.

Information Sharing	Brainstorming and Decision Making	Collaborative Work
Low Interaction	Moderate Interaction	High Interaction
Voice mail	Chat rooms	Whiteboards with audio/video link
E-mail	Electronic bulletin board	Electronic meeting system (EMS) with audio/video and text and graphic support
	Video conference	Collaborative writing tools with audio/video links
	Audio conference	Real-time data conference with audio/video and text/graphic
	Real-time data conference	

1. **Be clear about the purpose of the meeting.** Is it to share information with two-way dialogue and discussion, to generate ideas and discuss them, to make a decision, or to produce a product?
2. **Don't overcomplicate the situation.** Select the simplest technical solution, given the purpose of the meeting. The technology and the agenda should support the purpose of the meeting, not the other way around.
3. **Don't try out new technology during an important and time-critical session.** Test new technology yourself before you subject the team to it.

Below is a decision matrix that allows a team to match the technology to be used to the goal of the meeting. It allows the team to rate the effectiveness of each meeting technology on a continuum from not effective to highly effective, given the goal of the meeting.

<b>Type of Technology</b>	<b>Information Sharing</b>	<b>Discussion and Brainstorming</b>	<b>Collaborative Decision Making</b>	<b>Collaborative Product Production</b>
Voice mail	Somewhat effective	Not effective	Not effective	Not effective
Audio conference	Effective	Somewhat effective	Somewhat effective	Not effective
E-mail	Effective	Somewhat effective	Not effective	Not effective
Bulletin board	Somewhat effective	Somewhat effective	Not effective	Not effective
Real-time data conference (no audio/video)	Effective	Somewhat effective	Not effective	Somewhat effective
Video conference without shared documents	Effective	Somewhat effective	Effective	Not effective
Real-time data conference with audio/video and text and graphics support	Effective	Effective	Effective	Effective
Electronic meeting system with audio/video and text and graphics	Effective	Highly effective	Highly effective	Effective

## Virtual Meetings

It is a given that virtual meetings are a fact of daily corporate life, whether you are leading a virtual team or not. As a virtual team leader, you must be masterful at facilitating virtual meetings. They are really the primary method through which your team will communicate as a group.

## Tips for Teleconferencing

### Tip Number 1. Get organized!

Teleconferences can't be conducted "on the fly" or without considerable forethought and planning. Those who use teleconferences regularly and successfully will testify that these meetings require greater amounts of preparation than a face-to-face session.

### Tip Number 2. Assign meeting roles.

Another key to organizing teleconferences for optimal payout is to assign each participant a role to play throughout the session.

Most teams find it useful to rotate the meeting role(s) so that these types of responsibilities are shared. Whatever you choose to call them, consider assigning these four important roles for each meeting:

- *Scribe.* The scribe keeps notes for the meeting and distributes them afterward. He or she pays special attention to key decisions made, important information shared, and action items that need to be followed up on.
- *Gatekeeper.* The gatekeeper watches the gate of participation and opens it to those who haven't participated much, while closing it to those who have had a disproportionate amount of talk time. (The gatekeeper might say something like, "Thanks for your input, Jane. Mary, what are *your* concerns?") The phone leader previously mentioned is a type of gatekeeper.
- *Leader.* The leader organizes the meeting and facilitates it. Although distance managers often play this role themselves, rotating this assignment gives other team members a chance to learn leadership skills and share in the management roles and responsibilities. Typically, the leader keeps the group on track by assuring that the most important parts of the agenda are covered in the allotted time.
- *Participant.* Although it may seem that being a participant isn't a specific meeting role, effective groups soon discover that everyone in the meeting has certain responsibilities, such as supporting group decisions, honestly expressing their views, sticking to the agenda, and respecting others. Having these types of expectations clarified, prior to teleconferencing, makes it more effective and efficient.

### Tip Number 3. Use people's names.

When you cannot see the meeting participants, it is sometimes difficult to know who is speaking. This can result in confusion both in the conversation and afterwards, when people are unclear about who said what or who took which assignments. It also makes it much easier for the scribe or note taker to identify assignments and to accurately capture the meeting

proceedings. At the start of the meeting, have the members at each site introduce themselves, then set the guideline that each individual will identify her or himself each time they speak. Likewise, when responding to someone else's comment or question, use their name. This degree of discipline will keep the meeting clear and on track.

Another thing the gatekeeper did was to have name tents made up for each participant whether they were on-site or not. Having a name tent at an open chair, for each of the off-site participants, made it easier to remember that there were other people in the meeting who needed to be included and who didn't have the advantage of being within viewing distance of the speakers. Participants later reported that this was a helpful reminder.

**Tip Number 4. Remember that silence is not consent.**

The leader can perform a very helpful service by checking with each individual when decisions are made, to determine whether they are in agreement and will support the implementation and outcome of the decision. Without visual stimulation to keep participants engaged and alert, it is easy to check out or to abdicate ownership for decisions the group solves. Make sure that every person voices his or her concerns before closing on a decision.

**Tip Number 5. Visual cues, in particular, can be very helpful.**

One Hewlett-Packard operation found that they could communicate more effectively by stating what they assumed people were doing, but which they could not see for themselves. They would ask, "Marion, are you shaking your head and wincing right now?" or, "Bill, are you smiling at that last comment?" rather than have unconfirmed pictures like this in their minds. An even more direct application of this tip is to have people articulate the things they see themselves or others doing that are invisible to distant team members. You might say, "I'm holding up that report we did last month because I'm afraid we've already forgotten it," or, "You guys should see Lee right now; she's holding her hands around her throat like she's choking."

**Tip Number 6. Provide training and preparation in the effective use of teleconferencing.**

As with any other technology, teleconferencing requires that people be properly prepared in order to make the best use of it. Teach participants both the technical (e.g., how to join the conference or add someone in) and the social skills necessary to complete the conferences successfully. Both types of skills are important. Don't assume that if someone knows how to use a telephone, they will make effective use of teleconferencing.

**Tip Number 7. Be especially careful about background sounds over the phone.**

Some Web conference programs now allow the instructor/ coordinator to remotely mute the audio portion of the conference for a distracted participant who doesn't realize the noises he or she is making. It's difficult enough to use these technologies without having to battle with avoidable distractions.



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# Final Exercise



## Exercise

Your facilitator will assign one case study per group.



### Exercise: Action Plan

1. List three things that you have learned.
2. How will you put them to action?

**1.**

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**2.**

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**3.**

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# Appendix

## VIRTUAL TEAM ACTION PLAN

**Instructions – fill this out and e-mail it to every person at your table. You will meet monthly to review progress.**

What is one thing that you will work on in the following areas?

Areas of Focus	Action You will take	Target Completion Date	Outcome

## EXAMPLES OF SETTING EXPECTATIONS

<b>Member of a Matrix Managed Team</b>				
<b>Rating</b>	<b>Needs Improvement</b>	<b>Effective</b>	<b>Highly Effective</b>	<b>Outstanding</b>
<b>Things I should hear</b>	<p>Why is that person even working here?</p> <p>I don't trust they can handle that.</p> <p>I would not want them in front of anyone.</p>	<p>They complete every task they are given.</p> <p>They never disrupt the project meetings.</p> <p>They did an excellent job of completing the task/assignment.</p> <p>They are so nice to work with.</p> <p>Every once in a while they bring such great ideas.</p>	<p>They think of things before they happen!</p> <p>They implemented a solution I would not have thought of!</p> <p>If they take something on, I know it will be completed.</p> <p>The project was enhanced by them being on the team.</p> <p>They deserve recognition for being an integral part of the team.</p>	<p>I want that person on my team!</p> <p>The project could not have been completed without them!</p> <p>They did more than I would have thought possible. They practically led this project.</p>
<b>Expectations</b>	<p>Does not meet deadlines.</p> <p>Is apathetic.</p> <p>Argues with team.</p> <p>Causes frustration.</p> <p>Leaves project/tasks incomplete.</p> <p>Identifies problems, but does not bring solutions.</p>	<p>Meets and sometimes beats deadlines.</p> <p>Does everything that is asked of them, but does not go beyond.</p> <p>Takes pride in getting things done.</p> <p>Deals with issues effectively.</p> <p>Can bring innovative solutions, but not regularly.</p> <p>Are a good team member, but not a star.</p>	<p>Always meets and often beats deadlines.</p> <p>Does more than what is asked of them, proactively.</p> <p>Takes ownership of projects and tasks given.</p> <p>Provides solutions to issues.</p>	<p>Can respond to team needs seemingly before they happen.</p> <p>Is looked upon as a leader on any project they work on.</p> <p>They are sought out as a resource.</p> <p>Mitigates issues, proactively managing them.</p>

## LEADER'S TRUST CHECKLIST

### Trust Checklist

Trust Factors	Examples	My Actions
<i>Performance and Competence</i>	Develop and display competence.	Focus on individual and team results. Keep current in your technical area of expertise. Continue reading and learning about new skills, processes, approaches, and so on. Be open to new ideas and methods. Be able to say, "I don't know." Allow others to be experts. Foster expertise and sharing on the team—for example, set an agenda item for sharing learnings and establish a project Web page to share learnings.
	Follow through on commitments and show results.	Keep a log of commitments and make them visible to the team through e-mail or another means. Have a method to ensure follow-through. Keep promises even if circumstances have changed. Keep your commitments in cost, schedule, and technical areas. Inform team members well in advance if you will be late in any area.
<i>Integrity</i>	Ensure that your actions are consistent with your words.	Align your behaviors at meetings, during reviews, and at other critical times to the values and expectations you want to promote within the team. Have team members you trust watch you and give you feedback on the consistency of your words and actions. Conduct regular trust audits. If your actions are not consistent, explain why to your team members.
	Stand up for your convictions; display integrity.	Do the right thing in the best interest of the team or its members. Be able to say, "I don't agree" to those above you. Speak up for what you believe in with the team and with management. Continue to do the right thing, even in a crisis or firefighting mode. When appropriate, openly discuss your work-related convictions and values with team members and with management. Have an agenda item about this in team meetings.
	Stand behind the team and its people.	Keep up to date so that you can catch problems before you have to defend the team or any of its members. Always investigate problems with the team before commenting to others about possible reasons for them. Never speak negatively about the team to others.

	Communicate and keep everyone informed about progress.	<p>Hold a regular audio conference, video conference, or other meeting once a week and have an agenda that covers bad as well as good news.</p> <p>Don't forget people in remote locations and extended team members.</p> <p>Post information and decisions so that everyone has access to them.</p> <p>Ensure that everyone receives information in a timely manner. Use multiple, synchronous, asynchronous, and redundant communication methods.</p>
	Show both sides of an issue.	<p>Formally present both the pros and cons of issues. Post them on a Web site for the team members to read.</p> <p>Create an environment for and schedule time for discussion and debate in team sessions. Start a chat room or other means for asynchronous discussions.</p>
<i>Concern for the Well-Being of Others</i>	Help team members with transitions.	<p>Have standard processes for selection, rewards, assignments, and sharing of information that do not favor certain people, functions, cultures, organizations, or locations.</p> <p>Rotate the "good" and "bad" team jobs.</p> <p>Help team members to transition off the team and to new assignments.</p> <p>Assign partners to new team members for orientation and reassignment.</p>
	Be aware of your impact on others.	<p>Be aware that people are watching what you do, especially when you are a team leader.</p> <p>Take your role seriously.</p> <p>Take time to develop interpersonal relationships with team members', especially if team membership is permanent or long-term.</p> <p>Ask someone you trust to describe how you affect others on the team in different situations (for example, in crises or with demanding customers).</p>
	Integrate team needs with other team, department, and organizational needs.	<p>Map how decisions on the team will impact other functional areas.</p> <p>Ask others for their opinions about how the team's behaviors impact functional areas before implementing changes. Have team members explore this as a team assignment.</p> <p>Keep track of how decisions evolve and how they affect others on the team. Have team members report on how their decisions may affect other team members.</p>

## ADDITIONAL STRATEGIES FOR CREATING TRUST

It was already stated that trust in virtual teams is built differently and more swiftly than in traditional teams. With that in mind, the following are additional ways to build an atmosphere of trust in a virtual team.

- Build the self-esteem of team members by showing respect for their opinions.
- Help team members focus on the problem rather than blaming each other.
- Serve as a role model by demonstrating constructive behavior (maintain constructive relationships; take initiative to make things better, lead by example).
- Familiarize self and team with why trust is important.
- Take the time, up front, to allow your team members to get to know you and each other. (Take time to be a team.)
- If possible, meet face-to-face early in the development of your team. Miscommunication and conflicting expectations often arise from the lack of face-to-face contact time among team members. Face-to-face meetings will allow team members to develop relationships and trust much more quickly.
- Set up weekly ½ hour 1:1 sessions with yourself and your team members. This will allow them to get to know you (and you them). Help team members understand the mission of the team and allow them to voice their concerns in an open manner.
- DWYSYWD. Do what you say you will do. One of the quickest and most effective ways to build trust is to follow through on your commitments. Team members are more likely to trust one another if they feel team members are competent.
- Stand behind your team and your team members. Do not make disparaging remarks about the team's performance in public. If you receive negative information about a team member, be sure to investigate it thoroughly before acting upon it.
- Try to give each team member the opportunity to contribute. Don't rely more heavily on those team members who happen to be in your location.
- It is imperative in a virtual environment that organizations establish a clear policy regarding communications privacy and then strictly adhere to it.

## BEST PRACTICE STANDARDS FOR E-MAIL

### Standards for E-mail Information

**Include all previous replies in an extended dialog.**

Include all the previous replies in an extended dialog to bring team members up to date or to refresh their memories.

**Provide more information than you might otherwise.**

It's easy with e-mail to ask a question or to make a statement without explaining why you need the answer or why you're saying something in particular. Take a few extra minutes to explain why so that readers have an idea of where you're coming from.

**Create a message that looks the same on everyone's screen.**

Your team members won't always be using the same e-mail program to send messages. This means that some e-mail messages might look garbled. Use spaces instead of tabs, and put in hard returns rather than relying on automatic word wrap. Also, avoid formatting the text.

## BEST PRACTICE STANDARDS FOR TELECONFERENCES

### Standards for Teleconferencing Information

**Before saying anything, identify yourself.**

It's often difficult to know who is speaking on teleconference calls. To eliminate possible confusion, always identify yourself before making statements or asking questions. It's sufficient to simply say, "This is [your name]."

**If you're speaking directly to someone, say his name first to indicate this.**

Because you can't see your teammates, and they can't see you, it isn't obvious whether you're talking to the group or to an individual. Eliminate confusion when you speak directly to an individual by saying her name. For example, "This is [your name]. Betty, can you..."

**Send out an agenda and supporting documents one day before the meeting.**

By sending out an agenda in advance of the meeting, you're ensuring that everyone on the team will be on the same page, so to speak. It's a good idea to add a background section to the agendas, too. This section should summarize the events or situations that led up to the meeting.

**Include page and paragraph reference designators in documents.**

Often, you'll want to refer to specific documents during meetings. Be sure to send out those documents with the agendas. Every document should include page and paragraph reference designators so the team can follow along easily with the verbal discussion.

**For kickoff meetings, brief attendees on one another's backgrounds and expertise.**

A good way to do this is to create a document with a short biography of each person and to send it with the agenda before the meeting.

**Privately brief new or visiting members on everyone's background before the meeting.**

A good way to do this is to create a document with a short biography of each person and to send it to the new or visiting attendee before the meeting.

**Always brief attendees on the backgrounds and expertise of new or visiting members.**

It's best to take a few minutes at the beginning of the meeting to give a verbal summary of the background and expertise of the new or visiting attendee.

## Keys to Successful Virtual Meetings

Based on extensive research, there have been 7 key reasons that virtual meetings are unsuccessful.

**Lesson One: It is harder to follow a meeting process from a distance**

**Lesson Two: People don't get feedback when working over a distance**

**Lesson Three: People forget who is at a distributed meeting**

**Lesson Four: It is harder to build a team over a distance**

**Lesson Five: Network connections are unpredictable**

**Lesson Six: It is tough to sort out multiple communication channels**

**Lesson Seven: There is an art to using audio and video channels in a distributed meeting**

Let us review each one and determine how to address them effectively.

**Lesson One: Distance makes the meeting process harder.**

Different place meeting participants have greater difficulty than same place participants at following the process of the meeting. Different place participants are more prone to distractions and to trying to accomplish multiple unrelated tasks than same place participants are. This may be because, simply, they can. In a virtual meeting, it is possible for many participants to engage in outside tasks without others knowing they are doing so. It is tempting to try to read e-mail, catch up with unrelated work, or engage in social activity while keeping one eye on the meeting.

***Best Practices to address this lesson learned.***

- ***Make the pre-meeting plan very explicit.*** Plan the meeting in more detail than you would typically - be the case for same place meetings. Include in the plan anticipated timings for each stage of meeting process to support participants who will multitask other work and include a listing of technology tools to be used so each participant is prepared for that technology. Include the purpose and objectives of each stage so that participants will understand why time is being spent on that portion of the agenda. We have begun to pilot the wording of our interventions during pre-meeting planning, as we have found in virtual meetings that we do not receive sufficient feedback that our instructions are understood. We have erred by being both too general and too specific in our instructions and have found piloting to be the best solution for making sure they are correct.
- ***Engage vested interest.*** Correspond personally in advance with each participant directly to confirm their participation in the meeting and engage their vested interest. Find out what their personal goals are and determine to what extent their goals map to the team's

goals. We found that when a potential participant was unable to articulate a vested interest in the outcome of a meeting, that participant never showed up for the virtual meeting. Over the almost 100 sessions we have completed, we had a zero attendance rate when vested interest was absent.

- ***Create a scoreboard.*** Create a computer frame of the meeting's agenda and mark-up that frame with checkmarks and notes to focus participants exactly on the topic at hand. In this way, the frame would function as a meeting scoreboard, keeping all participants up to speed on status. If the software supports doing so, keep a current roster of who is at the meeting on the scoreboard.
- ***Focus transitions.*** The action of moving from one process stage to another should be complete and explicit. If virtual participants do not follow a transition, then they are lost during subsequent activities. One method of accomplishing focused transitions is to reserve specific communication channels only for transitioning between process stages. For example, we have found that distributed teams engaged in VIRTUAL COMMUNICATION interactions tend to focus on available video windows only during meeting initiation, stage transitions, and meeting conclusion. Therefore, it might be beneficial for the leader or facilitator to engage the video channel only during stage transition and utilize only audio and virtual communication data channels within process stages. While the meeting may not always be focused, the transition from stage to stage should be very tightly facilitated and focused.

### **Lesson Two: People don't effectively feedback.**

Even when different participants are trying to stay involved in the meeting process, they often have trouble engaging because communication through technology can be limiting and frustrating. Some audio connections are half duplex meaning that voice can only go one way at a time. With such phone lines it is impossible to interrupt a speaker to gain control of the floor. And the speaker hears no audio feedback from listeners asking for control of the floor.

#### ***Best Practices to address this lesson learned.***

- ***Explicitly facilitate feedback.*** The leader or facilitator should pro-actively seek out and provide feedback for different place participants. This might take the form of prompting for verbal response when comments are made or enabling groupware features (such as comment numbering) that encourage on-line conversational feedback.
- ***Encourage use of back channels for feedback.*** The leader or facilitator should make extensive use of available back channels, such as online chat windows, to encourage give and take among virtual participants. Establish a communication channel specifically for process discussion separate from the channels being used for task discussion. In addition, establish a private communication channel so virtual participants can communicate directly with the facilitator about process issues.

### **Lesson Three: People forget who is at a distributed meeting.**

Participants not only have trouble receiving feedback from other participants, they forget to provide feedback as well. In fact, we have witnessed several occurrences of participants — even facilitators — forgetting about different place participants who were participating in the meeting.

***Best Practices to address this lesson learned.***

- ***Reflect user's names when facilitating.*** At every opportunity when verbally interacting with virtual participants, use their name to address them. This not only pulls that participant more into the meeting, but identifies that participant to others and serves as a direct reminder to all that the named participant is actively engaged.
- ***Remind participants who is at the meeting.*** Verbally check in with all participants every 15 minutes or so (depending on the size of the group.) Again, reflecting names not only brings that particular participant back into the meeting, but reminds the other participants — and the facilitator — that the participant is still there.
- ***Distribute photos and short biographies.*** Some web meeting tools provide facilities to paste up pictures and biographies of meeting participants so that others can see their faces and learn about them. Even if the virtual communication in use does not support this, it is helpful to distribute web or paper versions of this information. The pictures might include shots of the meeting space itself so that others can picture what people look like assembled in the meeting room. The biographies should be more than just work resumes. They should include hobbies and interests so that distributed team members can build rapport over the life of a project.

**Lesson Four: It is harder to build a team over a distance.**

Different place participants have less opportunity for team building than same place participants do. The process of team building is a core stage of team work. It establishes team member roles, enables trust, and helps to create a team language for more effective communication. It is at this stage where team goals are established and individual team members determine whether their personal agendas align with the team's. Achieving successful team building is vital to effective performance.

***Best Practices to address this lesson learned.***

- ***Achieve very clear, unambiguous goals for the team.*** While well constructed goals are important for any team project, they take on additional importance for a virtual project. When team members buy into clear, concise, and unambiguous goals, the chance of personal agendas disrupting the meeting process substantially decreases.
- ***Have a kickoff meeting face to face.*** As it is very difficult to establish trust and a sense of team among strangers attached only through electronic technologies, when a team project will consist of several meetings or a long duration, bring the team physically together for a kickoff meeting if at all possible. This same place kick off serves the added benefit of providing an opportunity for training in the virtual communication technologies that will be used to support subsequent interactions.
- ***Engage in distributed breaks.*** This may be difficult to accomplish, but is well worth the effort. We used this technique during a meeting between Hong Kong and Arizona. The first half of the meeting was formal and rigid. The audio and video links were kept up during the break during which time informal discussion took place. The participants joked about the room lighting, the weather, and about faxing donuts back and forth. Following the break, the tone of the meeting was less formal with more of a sense of one large team rather than two separate small teams.

**Lesson Five: Network connections are unpredictable.**

Distributed computer and communication technology is inherently unreliable. Different place meetings often use technologies owned or managed by several different vendors. Systems administrators legitimately concerned about their systems security are often uncooperative in setting up the software needed for virtual meetings. Finding incompatibilities, instabilities, or administrative stone walls is a common occurrence.

***Best Practices to address this lesson learned.***

- ***Assume a technology learning curve.*** The first time you set up the technology for a virtual meeting, assume it to take ten times longer than you think it should take. Start that far in advance. If you are using other people's computers or software, it will take even longer. In time you may bring your preparation time down to a short period, but don't anticipate this happening right away.
- ***Have a fallback plan.*** Discuss a technology fallback plan with the team early in the process and establish ground rules and protocols for determining whether and how the meeting will go forward without some individuals or some communication channels. If protocols are well established, it should be possible to continue with the loss of one channel with minimal process disruption. Caveat: Distribute the fallback plan on paper before the meeting as you won't know ahead of time which channel is going down. You just may lose the channel you counted on to convey your fallback plan.
- ***Have on-call technical support.*** Know who is going to provide technical support at each site and know how to reach those people on a moment's notice. Don't rely on the primary meeting channels for contact with technical support as you will most likely need to contact them when you are having problems with those primary channels.
- ***Establish a re-bootstrap mechanism.*** Establish with the team a mechanism for ramping up again following a disruption of the communication technology, so that the team knows what to expect. This might be anything from a telephone tree or a known URL location so that all team members are informed of current meeting status, to standard individual work assignments if the link is lost, to fallback to simpler technologies (maybe ftp'ing or faxing of documents) for continued collaborative work.
- ***Download a process map to each participant.*** If each participant has a process map or agenda on their local computer, then even if a communication channel is lost, the team will know what activity is coming next. We facilitated a meeting where the audio channel was lost, but the team knew what GSS task was planned next and was able to engage in it without audio channel support. Once the facilitator started the next task, the team members followed along without a hitch, even without audio support.

**Lesson Six: It is tough to sort out multiple communication channels.**

Most of us have had too little experience interacting via computer and communication technologies in virtual meeting environments to know how to manage the communication channels before us. Further, many virtual meeting technologies are still in their infancy and produce inefficient or non-intuitive messages with noise and distortion. Our human filtering mechanisms are not very effective at making sense of all this. Consequently, distributed meeting participants may experience problems of either too little or too much communication information to effectively follow the meeting. While virtual meeting technologies continue to improve, the facilitator can take several steps now to help distributed participants mediate bandwidth issues.

***Best Practice to address this lesson learned.***

- ***Introduce new technology only on an as-needed basis.*** While most of us are comfortable communicating by telephone, the process of collaborating by audio, video, and data channels is foreign to most of us. It is helpful to begin collaboration with only the tools and channels required for the task at hand and then gradually add more features as needed. There is a tendency for computer proficient facilitators to show off their skill and enthusiasm by unleashing all the available technology right off the bat. This is a very bad idea.

**Lesson Seven: The art of using audio and video channels.**

Using a speakerphone or videoconferencing to support team communication is very different than talking one to one on the telephone. There are unexpected problems due to limitations with the technology.

***Best Practices to address this lesson learned.***

- ***Engage in a dialogue rather than give a briefing.*** We have found that as an alternative to giving a presentation, having the briefer engage in a dialogue with an individual discussant located at a different place site provides the briefer with much more feedback and makes the information more interesting to the different place participants. We have supported this by having the briefer show their PowerPoint show, but instead of simply stepping through it, had the discussant ask about and comment on each slide. The meeting participants reported that the briefer's personality shone through much better and that they remained more engaged in the subject matter.
- ***Engage in a dialogue with someone you know.*** We found it to be helpful if the discussant was someone the briefer knew fairly well. Briefers report they pick up more nonverbal feedback from familiar discussants than they do from unfamiliar ones. One briefer reported that he was able to visualize the discussants facial cues from his voice as that discussant was very familiar to him.
- ***Stay close to the microphone.*** We have noticed that when a speaker moves away from a speakerphone, even if his or her voice can still be heard, subtle information from inflection and tone is lost. The listener at the far end loses valuable, non-verbal information. Audience members asking questions of a presenter or speaker are often located distant from the microphone therefore non-verbal information from these questions is not conveyed.
- ***Engage everyone.*** To the extent the technology allows, we try to alternate our focus among the different physical sites engaged in the meeting. If there are multiple remote sites we alternately engage them by directing our comments to each site by name, "*San Diego, what do you think of that idea?*" "*Chicago, what do you think?*" We have also noticed that in some physical rooms, participants are dispersed in a manner that creates multiple logical local sites. When this is the case we treat each logical local site as though it was a physically separate site, "*Left side of the room, what do you think?*" "*Now, how about the right side of the room?*"

## CASE 1

### Large Tech Company Creates a Global Education Offering

The team was created to respond to an education need identified by the Large Technology Company Professional Development Team (PDxT). The PDxT needed to develop a course to provide Large Technology Company's managers with information and education experiences to help them become more effective as coaches and career counselors for their technical employees. The course was completed in just four months at a savings of several thousand dollars for the sponsoring organization.

#### Why it worked:

- *Team Leadership:* At the outset, the team developed a clear set of deliverables, a timeline, and an implementation plan. The plan served as a guide throughout the project.
- *Team Leadership:* The team was empowered to do whatever was necessary to achieve the goals without checking every decision with management. There was a high level of trust in the team. Empowerment allowed the team to meet the challenging deadlines on schedule.
- *Virtual teaming:* The team was able to meet objectives while operating as a true virtual team without the benefit of any face-to-face meetings. The people selected for the team were experienced and comfortable working in a virtual environment.
- *Communications technology:* The project demonstrated the fact that a virtual team can succeed without the use of sophisticated technology systems. The two primary tools used by the team were e-mail and audio conferencing.
- *Customer involvement:* The customer was an active member of the team throughout the life of the project, providing valuable input that ensured the product met their needs.
- *Management support:* Senior management supported the team by quickly approving the plan, trusting and empowering the team to make key decisions, and not interfering in the work of the team.
- *External relations:* The team succeeded, in part, because of effective relationships with many Large Technology Company organizations that provided input and resources, as well as, quick turnaround on the team's requests.
- *Team members:* The team had the right people from the standpoint of both team skills and their technical experience, especially their experience in working in a virtual environment. There was excellent collaboration between all organizations. The team did a great job of tracking outstanding issues and following up on action items on a weekly basis. The team would have benefited by doing a more thorough job of sharing information about their respective professional backgrounds at project launch. This would help with understanding the perspective each team member brings to the project.

## CASE 2

### Major Oil Company - Sarbanes Oxley/IT compliance

The team was created to respond the Sarbanes Oxley law passed in the United States. The SOX Project team had only nine months to establish a process for each application in SOX scope to learn about, implement and adhere to the new SOX processes. The team met with a great deal of resistance and was not able to complete its project under budget. Fortunately the company did not have to file with the Securities and Exchange Commission until the end of the following fiscal year.

#### Why it didn't work:

- *Team Leadership:* The team had a clear set of deliverables, but no clear path to getting to them. The leader did clearly define roles, but did not understand how to build trust within the team.
- *Team Leadership:* The leader was not well versed in virtual management. Therefore, she could not develop a high level of trust in the team. Lack of empowerment stifled the team meeting the challenging deadlines on schedule.
- *Virtual teaming:* The people selected for the team were experienced and comfortable working in a virtual environment. Unfortunately, the manager was not and tried to impose traditional methods to manage her team.
- *Communications technology:* The team had almost every major communications technology at their disposal. Most were too complicated for the need and excluded some team members due to location. Even with all that technology the team could not agree on a common tool and the leader was not savvy enough to enforce a standard.
- *Customer involvement:* The application managers of the organization were the end customer of this process. However, since the team could not master the art of virtual communication, their input was not evaluated.
- *Management support:* Senior management supported the team by quickly approving the plan, trusting and empowering the team to make key decisions, and not interfering in the work of the team.
- *External relations:* The team had excellent relations with the external auditors for the organization. However, since they could not rectify their communication and technology challenges, the team could not provide the auditors with information in a timely manner.
- *Team members:* The team had the right people from the standpoint of both team skills and their technical experience, especially their experience in working in a virtual environment. Unfortunately, there was no information sharing practices established by the group. Therefore, the team did a poor job of tracking outstanding issues and following up on action items. The manager of the team was mostly fighting fires due to this. She ended up being replaced by another manager also new to virtual teaming, but well versed in the basics. The new manager leveraged the team's experience and established routines to allow the team to communicate effectively.

## CASE 3

### Financial Services Firm - Lifecycle of Technology Assets

The Asset Management (AM) team was created to implement and manage a technology asset management process. The AM team had to put in place a national practice for the purchase, maintenance and disposal of highly sensitive technology equipment. The team was made up of representatives from every major retail location. None of the team members had experience with virtual teams, but the manager was strong. The team initially met with a great deal of resistance and but was able to save the company millions of dollars.

#### Why it worked:

- *Team Leadership:* The team leader leaned on the team to develop its objectives, such that there was great buy-in. The leader facilitated the creation of goals and roles. He built deep trust on the team.
- *Team Leadership:* The team was empowered to do whatever was necessary to achieve the goals. However, due to their lack of virtual experience, they were encouraged to check-in often. However, since there was a high level of trust, the team welcomed the coaching and input.
- *Virtual teaming:* Although not well versed in virtual teaming, team members relied on the manager to educate and coach them on how to be more effective. He spent a great deal of time understanding their personal communication styles. By the end of the first year, the team had over 60 hours of training on virtual teaming, almost all done through team meetings.
- *Communications technology:* Given the newness of the group, they primarily used audio conferencing and e-mail. They had communication operating procedures that allowed them to focus on doing their jobs and not how to communicate.
- *Customer involvement:* End users were often brought into the team conversations. Their views were heard and incorporated.
- *Management support:* Senior management supported the team by quickly approving the plan, trusting and empowering the team to make key decisions, and not interfering in the work of the team.
- *External relations:* The team did not start out with great external relations. However, because they communicated effectively internally they were able to eliminate vendor confusion.
- *Team members:* The team had the right people from the standpoint of both team skills and their technical experience. The manager was able to focus on establishing processes and procedures to develop a powerful virtual team. Therefore, there was well documented information sharing practices established by the group. The team did a poor job of tracking outstanding issues and following up on action items. The manager of the team was able to focus on the long term view of the organization.

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