



Virtual and Superior:

How to Build Teams that Get Things Done

Thought Leadership Series: Planning Ahead

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Executive Summary

More and more work is getting done by people who are less and less likely to share physical office space. The era of virtual teams is here, and given business efficiencies and practical realities, the acceleration of the trend is set to continue. Workers will increasingly be asked to connect with others across geographic and organizational boundaries.

Teleworking, outsourcing and globalization all speed the movement toward virtual teams. In 2011, 42 percent of U.S. companies allowed some of their employees to work remotely, up from 30 percent in 2007, according to Telework Research Network. Reliance on outsourcing grows every year based on the tangible value companies realize in increased time to market and reduced labor costs. And the economic impact of globalization is measured in trillions.

In all, it has become common to collaborate long distance, and best practices are emerging so companies and project managers can prepare to realize the benefits of virtual teams. Such teams can leverage skills from around the globe, boost overall productivity and competitiveness, and quicken growth with around-the-clock operation.

In this first article of a three-part series, ProjectsAtWork collects the wisdom from our active and engaged readership of global project managers to examine how virtual teams are established properly and for maximum impact. It turns out that keys to success in project management — strong planning and clear expectations — are critical to the foundation of virtual teams, too.

Picking the Right Participants

Building a good team is the single most important thing a project manager can do to achieve a successful project. Faced with obstacles, the team draws on shared determination to overcome and carry the initiative through. And absent challenges, the team ensures that its spirit and enthusiasm are reflected in a quality solution.

Virtual team members need certain attitudes and traits that reflect a willingness to embrace collaboration with a “customer service” approach. They think of ways to make work easier on others, while being as efficient as possible themselves.

“Our virtual organization depends on GoToMeeting with HDFaces video conferencing to maintain the company culture and promote teamwork.” — *Mike Huska, CTO, Incential Software*

Effective virtual team members:

- Believe strongly in the achievability of the team’s goals
- Understand the value of their own role and contribution
- Recognize the value of other team members (whether key specialists or entry-level assistants)
- Are naturally collegial
- Work collaboratively, sharing thoughts, ideas and concerns
- Possess coaching and counseling abilities, for interacting with junior members
- Listen actively, to absorb ideas and advice from other team members
- Communicate clearly in written and verbal formats
- Celebrate successes, so as to breed more

Savvy virtual team members realize trouble often occurs not because people fail in their individual roles, but because there is difficulty in the intersection of those roles. “Minding the gaps” among workers is achieved through team rules that place a priority on defined expectations and effective communication.

Setting Team Rules

Team rules are important to the functioning of any team, even those with ideal members described above and especially those with virtual workers. Team rules build credibility and respect by spelling out team member interactions. Team rules are the “how” that support the project charter’s “what.”

Such ground rules must reflect the norms or expected behavior of team members. They are the definition of “how we behave together” in this team.

Establishing team rules should be among the first priorities when bringing a virtual team together. Gather the group via videoconference to share prior team experiences, brainstorm a list of rules, and talk through all proposed rules to ensure each person has a clear understanding and will abide by them.

A strong set of team rules answers these questions:

- How will the team hold meetings and what are the standards for participation?
- How will the group gather data and feedback from team members and other stakeholders?
- How will team members be held accountable?
- How will the team make decisions?
- How will the team solve problems?
- How does the team define respectful behavior?
- How will team members communicate with each other?

Well-defined team rules reduce the general anxiety that occurs when people don't feel in control of their work. Providing structured communication, helping team members understand their responsibilities and clarifying what they are accountable for prevents potential conflicts. Adherence to such rules must be monitored and reinforced for maximum benefit.

Establishing Communication Practices

Research shows that for virtual teams the answer to the final question — How will team members communicate with each other? — is essential. Working remotely with others presents communications challenges, ranging from understanding others' work styles and cultural differences to overcoming time zone and language barriers. Adding complexity is that multiple forms of communication are available, such as telephone, email, instant messaging, social media and video conferencing.

“GoToMeeting is our primary communication tool. It's our pipeline that the company's built on. Everyone just knows it's how we communicate.”
— *Brian Roderman, co-founder and chief innovation officer, In2 Innovation*

All of this means that project managers must establish communications practices as the cornerstone to team success. Applying three key approaches will organize a team's efforts at the start.

When it comes to communication, place a priority on:

Documentation: There's an old saying that fits virtual teams especially well: If it's not written down, it didn't happen. Team members must crystallize and formalize what is said regardless of the communication channels they use to say it. Virtual teams are often brought together because individuals have certain skills to contribute the project. Capture that knowledge and create accountability through written documentation.

Then, provide a shared space to house documentation. A universally accessible and well organized repository must collect project plans and schedules, meeting agendas and minutes, working notes and diagrams, recorded training sessions and video conferences, and much more.

Repetition: Dale Carnegie had a saying: “Tell the audience what you’re going to say, say it; then tell them what you’ve said.” There’s greater likelihood for long-distance communications clarity using this method. Have a phone conversation, document the decisions in a team email and reiterate the message at the next group video conference. Research shows a speaker has to say something six times before 20 percent of the people hear it. Saying the same thing over and over again doesn’t make people boring — it makes them successful.

Simplification: Go back to basics with timeless wisdom: the Golden Rule. Communicate with others how you would like to be communicated with. Team members should be fair and inclusive in their communications. They should focus as much energy on being active listeners as on being effective presenters. Ask questions from a place of honest interest. And favor using simple, person-to-person forms of communication over disengaged exchanges when possible.

These principles breed practices that develop shared ownership of the project, which is why the virtual team is together in the first place.

Selecting Technology Interfaces

Research shows that the most commonly cited personal obstacle (94 percent) to working effectively in a virtual environment is the inability to read nonverbal cues, according to “The Challenges of Working in Virtual Teams,” a 2010 report by RW3 CultureWizard, a New York-based training firm. The absence of collegiality (85 percent), difficulty establishing rapport (81 percent) and a sense of isolation (66 percent) were also high on the list.

Project managers address these challenges at the outset of a project by offering remote workers a visual way to connect via technology, such as video conferencing systems and online meeting tools. With visual contact, team members can read important body language and facial expressions, feel linked to one another, and gain understanding from being able to “see what you mean.”

“As we expanded our work-from-home program, I was afraid of losing the sense of being a team. GoToMeeting with HDFaces video conferencing amplifies online project management and is an important part of the program’s success.” — *Alex Sobtzak, vice president, client solutions, Light[Port]*

Technology interfaces that provide teams these advantages have certain features to promote usage. Three are:

Flexibility: The needs of a virtual team often vary widely during the course of a project. Whether bringing the whole group together for an all-hands training session or helping two individuals connect for a one-on-one conference, a tool that is scalable may provide the most value to projects. A flexible platform for collaboration opens up diverse channels of communication.

Security: A team needs to feel confident about connecting across time and space, so the secure and reliable performance of a tool is essential. Strong encryption and high-quality transmission matter. So does the safety of shared documents and stored records. Project managers like the insurance available in the form of recorded meetings. If a problem arises, accessing the record and recounting the discussion helps a team plot resolution.

Ease of Use: A tool that's intuitive is a tool that gets used. Resources for the meeting organizer should make scheduling the conference simple and operating it hassle-free. Participants should find joining the meeting and interacting online uncomplicated. For interfaces to be effective, they need to remove barriers, not create new challenges.

Building Respect to Build Results

In the start-up phase of a virtual team, it is especially important to focus on relationship formation, and technology interfaces described above support the process. Building respect and trust among team members separated by time zones and continents is challenging yet critical to the project outcome.

To foster mutual respect, be:

Attuned to Cultural Issues: Increase the group's collective knowledge of the diverse cultures represented on the team at the outset. Discuss language differences and conversational styles, including accents. Advise team members to avoid slang, idioms or words with multiple meanings. Ask individuals to assess how their own cultural background may affect the team.

Fair About Logistics and Management: For teams spread across different time zones, rotate the timing of virtual meetings so that the same group isn't always inconvenienced. And for project managers, offer compliments and corrections with an even hand without regard to location. The "home office" team should not be favored in terms of assignments or responsibilities.

Focused on Competence: Each team member needs to develop a track record of competence and reliability with their teammates. He needs to do what he said he would do within the time he said he would do it. So create opportunities for individuals to have early wins on a project to boost their credibility and reputation.

By establishing a virtual team with the right people, resources and guidelines, distances shrink, relationships develop and work progresses.

Next Up

Operations Essentials: Getting things done, overcoming obstacles, measuring progress and more!

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