



UNIT-9

Managing Virtual Teams

Learning Outcomes

By the end of this unit the learner will be able to:

- ✓ Create a virtual workplace strategy
- ✓ Develop, implement, and maintain telecommuting programs
- ✓ Build a virtual team and lead them to success
- ✓ Plan and lead virtual meetings
- ✓ Use technology to support your virtual workplace
- ✓ Overcome cultural barriers when leading virtual teams
- ✓ Develop your virtual leadership skills

Unit 9

Managing Virtual Teams

Defining the Virtual Workplace

The New Workplace

The International Data Corporation's Mobile Worker Population 2011–2015 Forecast estimates that by 2015, there will be 1.3 billion mobile workers on the planet, making up about 37% of the global workforce.

(This report is available in its entirety from <http://www.marketresearch.com/IDC-v2477/Worldwide-Mobile-Worker-Population-Forecast-7646772/>. Please note that Velsoft is not affiliated with this website or responsible for its contents.)

We define these **mobile workers** as employees who work outside of the office and stay connected via technology. (Think of salespeople who spend a lot of time on the road, computer programmers who work from home, and supervisors who move from plant to plant.) These mobile workers work in a **virtual workplace**, which can be defined as a company that uses technology to conduct business in a variety of locations. The terms **telework** and **telecommuting** are used to describe employees who work in an offsite location, usually from home.

Sometimes, traditional and/or mobile workers are brought together to form **virtual teams**: an interdependent group who works together towards a common goal but is not in the same physical location.

Advantages to Businesses

Making the transition to a virtual workplace can have big advantages for a business, such as

- Allowing employees to work from home can reduce overhead
- Having a wider operational area means a bigger pool of talent to source people from
- Having people from different backgrounds and regions can bring you closer to your market (depending on your industry)
- Mobile workers are more connected and more accessible
- Having several bases of operations makes a business more resilient in case of disaster

Advantages to Employees

Many people struggle to maintain a work-life balance. Being a mobile worker can offer employees the opportunity to create custom, flexible jobs. Reduced time spent commuting and increased scheduling freedom can reduce stress, increase employee happiness, and give the business a more committed, loyal workforce.

There are Disadvantages!

Of course, the virtual workplace has its disadvantages, too. Without good leadership, mobile workers can feel isolated and disengaged, and become less productive. Distractions and time management can be a challenge for some people, too. If virtual workplace programs are not implemented and managed properly, they can be very costly for businesses.

For example, in 2013, a United States company discovered that one of its telecommuting software developers had outsourced his job to a development firm in China. Although the developer had excellent performance reviews and was considered the best in the company, a digital forensic analysis revealed that his work had been done by this outsourced firm for several years. This created a huge security risk for the company and raised questions about their management policies.

Creating Virtual Workplace Programs

Building a Virtual Workplace Strategy

If your organization has decided to incorporate mobile elements into the workforce, it's important to develop clear guidelines and expectations. This organizational strategy can then be customized for each department and/or team.

The organizational strategy should include the following elements.

Strategic Vision

Why is the organization incorporating mobile workers into the workforce? Some common reasons include:

- Larger geographic reach, so that the organization has a larger talent pool to draw from
- Better access to key markets
- Competitive advantage
- Improved employee work-life balance
- Preparation for disasters or crises

Overall targets can also be helpful, such as a particular department going entirely mobile or a certain percentage of the workforce reaching mobility by a particular date.

Integration with Existing Policies

This section should answer the following questions:

- Will this be a new program, will it clarify existing policies, or will it fulfill both purposes?
- How will this virtual workplace plan integrate with existing policies, such as health and safety, security, and legal regulations?

Depending on your organization and your geographic area, you may need specialized policies and subject matter experts to help you with these elements.

Telework Options

What will mobile work options look like for each segment of your business? For example, perhaps door-to-door salespeople will be allowed to flex their hours and telework for 100% of the work week, while personal assistants will be allowed to telework for one day of the week.

Core working hours can also be specified. For example, the employer may mandate core hours of 10 a.m. to 4 p.m., with all workers able to shift their day two hours in either direction. This works especially well for employees in different geographic regions.

This section of the policy should also describe how much authority managers and employees have to customize the program, and who special requests should be directed to.

Costs and Reimbursements

Describe what costs employees will be reimbursed for (such as telephone, Internet, resources, etc.) and what costs they will have to cover. You should also outline what resources the employer will provide (such as cell phones, laptops, tablets, etc.) and who has responsibility for device maintenance.

Responsibility and Accountability

Your plan should clearly outline the employee's responsibility for completing their job and ensure that they have the appropriate resources to complete their tasks while mobile. In most organizations, telework is a privilege and can be revoked at any time.

You should also outline what happens if the mobile worksite loses power, Internet, and/or telephone. Will the time be waived, or will the employee have to come to the office or make up the time later?

Resources

In this section, outline what resources are available to employees, including technical support, policy questions, and human resource issues.

If a significant portion of the workforce will be telecommuting, your organization may want to appoint a virtual workplace coordinator who will help implement, maintain, and oversee your telework program.

Pre-Assignment Review

What elements of this virtual workplace program are working?

What elements of this virtual workplace program are not working?

What can I take back to my organization?

What would I change to make these elements work better for my organization?

Setting up Employees for Telework

Choosing Mobile Workers

Depending on your organization's mobile workforce plan, you may have some decisions to make. For example, you may be able to allow telework based on certain circumstances, for certain roles, or after a set period of time with the company. Or, some positions may be telework-only. In addition, you may also receive requests from employees to work virtually.

In any case, you should evaluate an employee's suitability for the mobile work program based on the policies and procedures laid out by your organization. The employee's approach to work should be considered, too.

Mobile workers should be able to:

- Work independently
- Manage their time well
- Motivate themselves
- Complete projects on time
- Work well with others (in person and virtually)

Like any management decision, document decisions about mobile workers fully. Include what decision was reached, what information the employee was given, and what action items are to follow.

Setting Expectations

Once the decision has been made for a worker to become mobile, have a meeting with them to discuss what this will entail. (The meeting should be face-to-face, either in person or via video conference.) Topics for discussion should include:

- Job responsibilities
- How tasks and projects will be communicated to the employee
- Employee's responsibilities in terms of communication (for example, status reports and meetings)
- Procedures for requesting vacation and sick time
- When and how the employee should be available to others and working hours (include the employee in this decision if possible)
- When resources are available (including your hours, co-workers' hours, technical support, and human resources)
- Full review of the organization's virtual workplace policy

Starting Slow

If possible, mobile workers should be eased into the virtual workplace. Typically, this means being mobile one or two days a week, and then ramping up to full-time telework if everything goes well for both the employee and the employer. This is especially helpful if mobile workers are new for your organization, as it gives you a chance to evaluate and revise your program.

Managing Performance

Staying on Top of Projects

When you share the same space as the people you manage, a lot of leadership happens naturally. For example, when you see them in the break room, you might chat about how the weekend was. If they have a problem with a project, they might pop into your office for a moment to ask your advice.

When your employees are in a different location than you are, leadership can be a little bit more difficult. Typically, mobile workers are capable, independent self-starters who don't need a lot of hand-holding to complete their projects. However, you still need to be clear about projects, goals, deliverables, and processes.

To avoid constantly wondering (or asking) how things are going, set clear expectations for communicating progress and issues. Online project tracking tools are great for staying in touch: employees can update their progress, log activity, and report issues as things happen, rather than submitting a daily status report that might say the same thing over and over.

Although you don't want to micromanage, you also have a responsibility to ensure that things are getting done. Regular meetings can give you a forum to ask how things are and to ensure that everything is on track. If workers seem to be offline more than online, or late completing projects, don't be afraid to ask them for more frequent updates. Nipping problems in the bud is an important part of managing mobile workers.

Keeping in Touch

Mobile workers may need more of a personal relationship with you and others in the organization. Make yourself and other key people available in real time via instant messaging, telephone, and/or videoconference. Check in with them to see how their weekend was, or just to say hi.

When possible, include mobile employees in social activities. For example, a mobile worker probably won't feel included when they're invited to a pizza lunch that's across the country, but maybe you could have pizza delivered to them instead. If events are taking place in their area, invite them along. Or, develop online spaces for people to hang out in. A little bit of creativity and thought can go a long way towards engaging mobile workers.

Choosing the Right Tools

Checklist of Tools

A successful virtual workplace is people-focused, with flexible, adaptable tools to support it. If your organization bases its mobile strategy on a particular piece of technology, it could be outdated in a year or two, and you'll be back to the drawing board.

With that in mind, there are some key tools that can make a virtual workplace much more connected.

Computers

Most virtual employees will need a computer of some kind, whether it's a smartphone, tablet, laptop, or desktop machine. Ensure that the device you choose supports the tools that the organization uses. It should also provide easy access to e-mail and other key services.

Video and Telephone Conferencing

Access to good quality, reliable video and telephone conferencing lines is crucial if mobile workers need to communicate with others. Make sure that the services you subscribe to can be used in all the regions that your workers operate from.

Central Document Repository and Tracking

If your mobile workers will be working on important documents or files, having a central repository with version control should be part of your virtual workplace. This ensures the safety, accuracy, and accessibility of important files.

Team Website and Project Tracking Tools

If mobile workers will be working in virtual teams, a team website and project tracking tools can help everyone communicate progress, seek help, and stay connected.

Instant Messaging Applications

All virtual employees should be connected with instant messaging, preferably with an application that also supports video chat. All employees should be required to be signed into the instant messaging application and to be available during working hours.

A Note about Internet and Data Access

Always check to see what Internet and cell phone access is available from your mobile workers' locations. Ensure that you have policies in place so that people know what to do when there is an outage.

Making it Work

The most important thing to keep in mind about technology is that it should work for people, rather than people working to make it work. Ensure that the technology you implement supports the work that people do and makes their lives easier. As well, ensure that you have appropriate support people available where and when your employees need it. A full-time resource may be required to implement, maintain, and update the tools that your virtual workplace needs.

Building Virtual Teams

The Stages of Team Development

As early as the 1970's, researchers were discovering that groups of individuals working together go through four distinct stages of development. The most famous representation of this model is Tuckman and Jensen's Forming, Storming, Norming, and Performing model. Over time an additional stage has been added to reflect the natural end to a group: Adjourning.

Although this model was based on traditional, in-person teams, it applies to virtual teams, too. Let's look at the five stages.

Stage One: Forming

At this stage, team members:

- May be anxious, adopt wait-and-see attitude, and/or be formal
- Have no clear idea of goals or expectations
- Need to get to know one another
- May not be sure why they have been invited to the team

A leader can help by:

- Arranging an in-person team kickoff
- Working with the team to establish ground rules
- Setting expectations with the team and individual team members

Stage Two: Storming

At this stage:

- Team members are eager to get going and they may be impatient with delays
- Conflict can arise as people bring different ideas of how to accomplish goals
- People notice differences rather than similarities
- Some members may drop out mentally or physically

A leader can help by:

- Building relationships with team members
- Staying in touch with the team and keeping on top of problems
- Ensuring that team members are communicating with each other and meeting expectations
- Modeling appropriate behaviors
- Separating problems from people
- Keeping in mind that conflict can be healthy

To move to the next stage, participants have to put the needs of the group ahead of their personal interests.

Stage Three: Norming

At this stage, team members:

- Begin to recognize ways they are alike
- Realize that they are in this together as a team
- Start working together and communicating
- May become too social and lose focus

Many groups don't make it to this stage, where there is much more cooperation and understanding than previous stages.

During this stage, **the leader should:**

- Be observant of emerging group behaviors
- Encourage the team to express their differences positively
- Help the team stay focused on their objectives
- Ensure that technology and tools are supporting the team and working as intended

Stage Four: Performing

At this stage, team members:

- Are mature
- Understand their roles and responsibilities
- Want more input in processes
- Are self-motivated and self-trained

During this stage, **the leader should ensure that:**

- Individual ideas are considered
- Individual and team goals are being met
- They provide appropriate support when needed, particularly if the team regresses to a storming stage
- Technology and tools are being used appropriately and are working

Stage Five: Adjourning

Groups may adjourn because they finish a defined project or because they are no longer challenged. If there

are new members, that can shift the group into a previous stage.

At this stage, team members are:

- Winding down and saying goodbye
- Setting goals for future work independently and/or as part of new groups

In this phase, **leaders can support the group by:**

- Celebrating participants' participation
- Describing what's going on
- Helping participants plan for the future
- Looking for and encouraging contribution from everyone as the group winds down
- Encouraging continued productivity

Making Connections

Case Study

Jason has just been promoted to a new position: supervising a team of six customer care representatives. Four of the representatives work in a shared space just down the hall from his office. (They are responsible for drop-in customers and telephone support.) The other two representatives work from home handling telephone and e-mail support requests. They are about an hour away from the main office where Jason and the rest of the team work. (Ironically, their homes are only about ten minutes apart.)

Jason knows that there is some animosity between the in-office representatives and the representatives working from home. The people in the office feel that the representatives at home have an easier job since they don't have to deal with customers. The people at home are often left out of social events. Jason knows that they aren't as motivated, engaged, and productive as they could be.

Questions

What should Jason do to bring his virtual team together?

Choosing the Virtual Team

If you're in charge of choosing a virtual team, there are some steps that you can take to ensure success. To start, think about the areas that the team will be working in. Will it be a marketing venture? An IT project? A hybrid of areas? Or will it be a brand-new venture that no one in your company has expertise in? Make a list of the various skill areas that you need.

Once you have identified the skills that you want, take a look at the people in your organization and determine who matches the team's needs. You may even want to list your desired team members by role. (If you do this, make sure you include a second choice for the major roles.) If your project is in a particularly specialized area (especially if this area is new for your company), you may want to consider adding consultants or subject matter experts to your dream team list.

Your choices should consider personality and work ethic, too. Ask yourself:

- Is this person a motivated self-starter?
- Does this person work well on their own and with others?
- Does this person have experience with virtual teams?
- Can I provide this person with the tools and technology that this team will be using?
- What level of supervision will be required for this person?

Now that you've identified who you want, identify the possible obstacles to getting these people on your team and how to get around them. Once you have a plan in place, it's time to act!

Making the Best of an Assigned Team

In the ideal world, you will get to select the people with the right skills and the commitment to get the job done. However, in the real world, you won't always have the advantage of being able to choose every member of your team. Sometimes people are selected because they are available, rather than because of their skill or talent.

In this situation, you will still want to make a wish list of skills, expertise, and personality traits that you are looking for. Then, compare this list with your team members. Who is the best fit for each role or task? Remember, you're looking for potential as well as actual skills and expertise.

If you find that you have a major gap between what you want and what you have, there are three options to consider. One option is training for team members to make up for the skills that they lack. Another option is to bring in an outside consultant or subject matter expert. Or, you can simply proceed with what you have and hope that the gap is filled in with what the team learns as they go along. It can be very risky to expect people to learn new skills while executing an important project, but it can also be very rewarding for the team members.

Strategies for Success

Once the virtual team is established, there are a few things that you can do to ensure its success.

Hold a Kickoff Meeting

If at all possible, have the first team meeting in person. Complete some team-building activities and some social activities together. This is also the time to set ground rules, establish the team's goal, and set expectations.

Build Relationships

It's all too easy for mobile workers to feel isolated, and for that isolation to turn into disengagement and chronic low morale. Help the team build relationships by:

- Engaging in small talk before and after a meeting
- Having meetings in person when possible
- Holding social events (in person or virtual)
- Making communication easy by providing instant messaging applications with video chat
- Creating social spaces for people to hang out in
- Relying on each other for information and help, and using you (as the team leader) as a last resort)

Manage Performance

Earlier, we talked about ways to manage performance and how important it is to be proactive with mobile workers. Make sure that you set, manage, and monitor expectations. Keep lines of communication open and let your team know that you're there to support them.

Be Consistent

Being consistent is extremely important when leading a virtual team. If you usually respond to e-mails within a few minutes, for example, but leave one team member hanging for days, they might start to wonder if they've done something to upset you.

Give Trust to Get Trust

Trust people to do the job that you've assigned them to do. Ensure that processes, resources, and tools are in place so that they can be successful and let them do their work. Trust them to reach out to you if they need help.

Reward the Team

Rewards are important for traditional teams, and virtual teams are no exception. Reward them whenever you can, whether it's words of recognition, an extra day off, or a free lunch delivered to everyone on the team.

Encourage Communication

One of the biggest challenges for a virtual team is communication. One way to make communication easier is to make sure that everyone is accessible via phone, e-mail, and instant messaging during working hours. You may want to have a contact sheet posted on your team's website with everyone's contact information, as well as the best time to contact them. (This is particularly important for teams spread out across different time zones).

Set a good example by checking in with everyone at least once a day, even if it's just to say hi or ask how their weekend was. Make sure that everyone knows that they are expected to be available during working hours. Address any attendance issues right away.

E-mail can help communication, but it can also hinder it. There's nothing worse than sitting at your computer and pressing the Receive button over and over, waiting for an important reply that you need to continue working. The easiest solution to this is to encourage people to use an alternate method of communication for important items, such as the telephone or chat.

You can also set expectations for communication response times. For example, many businesses dictate that a voice mail message must be answered within eight business hours. You can also set e-mail response times based on message priority, like this:

- Low importance: Answer within eight business hours
- Normal importance: Answer within four business hours
- High importance: Answer within one business hour

Another way to facilitate communication is to schedule it. For example, a communication schedule for a virtual customer care team might look like this:

- Daily: Update cases on the server as you complete work on them
- Weekly: Send report to manager with a summary of weekly metrics
- Bi-Weekly: Attend team meetings via video conference and report on any issues that need to be escalated
- Monthly: Attend individual meeting with manager via video conference to review performance

Model the Way

Behave in a way that reflects the expectations that you've set. If you expect team members to be online by 9 a.m. and reply to e-mails within an hour, but you log on at 11 a.m. and take all day to answer their questions, you're sending the wrong message.

Leading Virtual Team Meetings

Scheduling and Conducting Team Meetings

Choosing a Method

Team meetings are a crucial part of your virtual team's success. Here is an overview of team meeting methods, from most to least interactive:



Things to Consider

If you choose a telephone or video conference, make sure that:

- Toll-free numbers are provided to participants if their telephone lines are not paid for by the company
- The service is reliable and good quality
- Team members have the necessary tools (such as headsets and web cams) and software to participate in the meeting

Setting Expectations

Ensure that all team members know when the meeting will be held and what format it will take. Send out the agenda and action items that team members are responsible for at least one day ahead of the meeting.

Scheduling recurring meetings can help maximize attendance. If this is not possible, give team members as

much notice as possible before a meeting. If the time, date, and/or method of the meeting changes at the last minute, contact team members by phone or instant message to inform them. Scheduling meetings using information management software (like Novell GroupWise or Microsoft Outlook) can help automate updates and keep everyone informed.

Choosing the Time and Place

Meetings should always be scheduled at the most convenient time for participants and in a fair way. For example, if you have one person who is four hours ahead of everyone else, they should not always be the one at their desk at 8 p.m. If necessary, rotate meeting times.

Conducting the Meeting

Once everyone is online, have each team member introduce themselves. Then, start the meeting with some small talk to break the ice. You may even want to conduct a short icebreaker, like asking each person to share something funny that happened to them during the past week.

Make sure that everyone has a copy of the agenda and that you stick to it. Frequently stop to check in with group members to see if there are additional points or questions. Some teleconferencing software offers a “Raise your hand” or “Ask a question” feature, which can alert the facilitator when their attention is needed. This is especially useful when teleconferencing or when having a video conference with a large number of people.

Following Up

Wrap up with a summary of what was discussed. You should also review action items and remind everyone of the next meeting date (if it has been set). If appropriate, you may want to e-mail everyone a summary of the meeting with any documents that were provided or discussed.

Some teleconferencing software allows you to record meetings. If so, you may want to post these recordings on the team site for easy reference later on.

Working with Cross-Cultural Teams

Often, virtual team members are located in different countries and are part of different cultures. Part of your job as team leader is to help the team overcome cultural differences and ensure that everyone is communicating well.

Here are some things that you can do to bridge the cultural gap:

- Be familiar with cultural customs, such as shaking hands, body language, and eye contact.
- Understand that words do not mean the same thing in every language, even simple words like “yes,” “no,” and “okay.” Get to know the terms that your team members are using so that you can clearly communicate with them.
- Communicate in multiple ways. For example, during a team meeting you present changes to the project plan and ask for questions. Then, you e-mail the team a list of the changes and action items. The next day, you follow up with each team member via telephone or chat to check for questions and make sure the plan is clear.
- Ask open questions rather than closed questions to confirm understanding. For example, instead of saying, “Did you get that?” ask, “Could you repeat our plan back to me?”
- Touch base with team members frequently and address concerns immediately.
- If you have a team in a significantly different cultural area, it may be worth your time to spend some time with them in person.
- If your team is struggling with cultural differences, diversity or cultural awareness training might be appropriate.

What other tips do you have for managing cross-cultural teams?

Debrief

Be a Communicator

We've talked about communication throughout the course, but its importance can't be overstated. Communication is crucial for virtual teams to succeed.

Set Goals and Expectations

People need to know where they're going in order to get there. Work with them to set goals, let them know what your expectations are, and help them get there.

Create Ownership and Accountability

Make people accountable for the work that they are doing. If someone from another team has a question about a document that a team member prepared, for example, put them in touch with that person. Likewise, if the CEO sends you a compliment about the new website design, pass that along to the person who designed it.

Be Results-Focused

Successful virtual managers focus on results rather than hours and minutes. Of course, this depends on the organization, but many mobile workers put in fewer hours and get more done. Most employees feel grateful for this flexibility and more loyal to their employer.

Show People That You Care

Mobile workers often need more personal support in order to prevent isolation and disengagement. Check in with them frequently and ask how they are doing to build a personal connection.

Build Trust and Credibility

In the virtual world, it's all about your actions. Do what you say you're going to do and go to bat for your team when necessary. Otherwise, your team members won't trust you, and you won't get the productivity and results that you're looking for.

Keep Learning

The virtual workplace is constantly changing. Keep learning about technology and stay in tune with what your competitors are doing. It's also wise to periodically check in with your team to see if their tools are still meeting their needs.

As well, don't forget that your primary role is a leader. Continue taking leadership courses and building related skills (such as communication, conflict resolution, and personal productivity).

Help People Do What They Love

If you can give team members some control over the type of work that they do, they'll be even more motivated and results-oriented. Remember what Marc Anthony said: "If you do what you love, you'll never work a day in your life."

Build People Up

This is one of the most basic principles of leadership and relationships: build people up rather than tear them down. Offer constructive criticism and development opportunities to help people grow.

Be Consistent

When working with people in a virtual environment, they have to fill in a lot of gaps. Be consistent to minimize those gaps and to ensure that they're getting the right message: you're there to support the team and help them achieve their goals.

Further Reading:

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