BRINGING REALITY TO YOUR
VIRTUAL TEAM By Yael Sara Zofi

TECHNIQUES TO SET-UP, FOLLOW-THROUGH, AND REFRESH VIRTUALLY

Over the past several years, AIM Strategies® has been working with Global Virtual Teams (GVTs) that are challenged by working across continents, cultures, languages and time zones. Findings from our work together have provided the basis for my creating a specific methodology, the 'VIRTUAL ROADMAP, which offers a practical blueprint for leaders to overcome these challenges and establish strong connections within the team. In a complex global environment, organizations increasingly turn to GVTs to meet business goals. Therefore, leaders need to understand how the three phases of the 'VIRTUAL ROADMAP (SET-UP, FOLLOW-THROUGH and REFRESH) work together to achieve success. This article offers suggestions and tips to help you generate meaningful dialogue with various stakeholders as you travel together on your virtual road trip!

WALK into any office today, and you know things are not as they were a decade ago. If you engage employees in conversation, many will say that they are working on some projects with co-workers who are not located in their building, their city, or even in the same country. Ask them if they have met these same teammates, and some may claim to have viewed pictures posted on an intranet, while others may tell you of traveling to a corporate offsite.

Although this virtual work arrangement already exists in some offices, the reality is that by 2008 41 million employees worldwide will spend at least one day a week working 'virtually', according to the Gartner Group.[1] The Global Virtual Team, or GVT for short, is a group of people sharing responsibilities for goals that must be accomplished in the total, or near total, absence of face-to-face contact. Enabled by technology, the GVT is a natural solution for solving business issues in our fast-paced global environment. Increasingly, leaders are charged with quickly putting together teams of appropriate skills and abilities to fit a project's timeline, regardless where the talent is physically located. In such situations, email has usurped voicemail while conference calls have replaced conference rooms as the meeting venue of choice.

THE VIRTUAL ROADMAP

As GVT arrangements become increasingly popular, leaders will grapple with a profound issue - how to get team members to bond and form the energy so vital to pushing projects forward and achieving results. AIM Strategies® has created a VIRTUAL ROAD-MAP for leaders to help their teams establish connections, preparing them for possible scenarios that do not occur in a traditional (otherwise known as "co-located") team. Our VIRTUAL ROADMAP is a practical blueprint to guide team members in achieving goals in this complex and unpredictable environment. It consists of three phases: **SET-UP, FOLLOW-THROUGH**, and **REFRESH**.

In the **SET-UP** phase the leader explains the **TEAM DESTINATION,** ensures **TEAM SYNTHESIS**, creates **RULES OF THE ROAD** and provides advice on potential **ROADBLOCKS** that may arise.

FOLLOW-THROUGH is what the leader does to ensure that the team adheres to norms created in the **SET-UP** phase. Activities include **DRIVING ACCOUNTABILITY, PERFORMING MAINTENANCE, and AVOIDING SHARP TURNS** as the team moves forward.

Finally, in the **REFRESH** stage the leader renews the energy in a long-standing team. Tools and techniques include: **SHIFTING GEARS; TUNE-UPS** and **REFUELING.**

SET-UP

TEAM DESTINATION – If you were driving a group of passengers somewhere, you would certainly make the destination known before embarking on the journey. Likewise, your team members need to know the project's goals before assignments are set. Of course, traditional teams share this essential requirement, but its members have the advantage of comm-

unicating and working towards a common understanding during face-to-face meetings. GVT leaders must ensure that dispersed team members are committed to a project despite their physical distance from each other. There are a number of ways to accomplish this.

Initially, the leader should bring the group together to explain the project's purpose, preferably at an offsite, or at minimum by phone. Consider covering these elements: communicate the project's goal(s), explain why each individual was included and assign concrete deadlines to each team member. Make sure that everyone knows the details of a plan to ensure ongoing communication (examples: a networked website, a weekly virtual meeting or phone conferences at appointed times).

TEAM SYNTHESIS – If you were driving a group of passengers on a long journey, you would also want them to be at ease with each other. Similarly, as the leader ultimately responsible for results, you need to ensure that members of the group are similarly comfortable. Traditional teams have many opportunities for face-to-face contact - at the water cooler, in the hallway, or at their own work desks, enabling members to establish common ground and develop a common identity.

In order to build a GVT's identity, the leader must engage in team conversations that help bring everyone closer together - at the same time GVT members must make an effort to discover commonalities. In these team conversations members get to know one another by sharing basic information about themselves. Suggestion: the leader can pick a topic critical to the team's operation (for example, communication practices) and use everyone's input to make decisions. TEAM SYNTHESIS becomes the cornerstone of a GVT's success and helps to build the group's identity.

GVT RULES OF THE ROAD – Once synthesis is complete and members are comfortable with each other, it helps to create team norms that become central to the workflow. These norms are a GVT's RULES OF THE ROAD and help steer members' interactions. We recommend creating a TEAM CODE, which utilizes a common language, through the use of

specific phrases, or acronyms for standard processes and procedures.

Next, clarify how each member will contribute to this 'journey' by assigning ROLES. Members take on several roles, in addition to their special expertise, that are unique to a virtual team, such as ownership, process, and client contact roles. Without a manager overseeing activities at close range, self-management becomes essential. Ideally, each individual should take on a leadership role for his/her part of the project. Given the different schedules and multiple responsibilities of Global Virtual Teamers, we often recommend assigning

> *"The reality is that GVTs are here to stay - - and a successful 21C leader will be defined by his or her mastery of their many dimensions."*

one person as the point of contact for schedule changes and another to collect and communicate client-related issues. Spreading these roles among teammates distributes accountability, just as drivers are rotated on long road trips.

OVERCOMING ROADBLOCKS – On every journey, roadblocks appear. Of course, being aware of potential issues before they rise up makes one better prepared to deal with them. We recommend that leaders educate members about cultural differences, anticipate technology glitches and clarify potential differences in email styles.

Cultural differences stand out as significant barriers to GVT effectiveness because they permeate most aspects of a person's behavior. Individuals from Western and Eastern cultures not only differ in degrees of assertiveness (which affects interactions) but also may differ in reward expectations. When teammates are aware of these differences they may find it easier to approach those who act differently.

As the main communication vehicle for GVTs, technology brings a variety of issues, from technical difficulties to unfamiliarity with use. To prevent feelings

of frustration the leader needs to make comprehensive training available to those who need it. In addition, a point of contact should be put in place in case of problems.

Not surprisingly, a frequent roadblock in a GVT occurs when an email's tone and content are misunderstood. Some people prefer to write highly detailed emails, wanting the reader to understand how their assumptions were made and what conclusions they reached. Others opt for short, to the point emails, sacrificing details for brevity. Miscommunications can arise when someone impatiently skims a lengthy email or, at the other extreme, feels that a brief note is not informative. In addition, an overly brief email can be interpreted as rude or disrespectful. To avoid this situation members should be aware of the different ways that people express their ideas. Hint: write emails in the style that you believe your reader prefers. AIM offers training modules to help your virtual teamers write effective emails and **SET-UP** their Virtual Roadmap.

FOLLOW – THROUGH

Once a GVT is up and running, the journey has begun. Now the leader must ensure that the team travels the course as planned. **FOLLOW-THROUGH** is especially critical because once the **SET-UP** is complete, members often return to their home offices and fall back into familiar routines. Without the supportive face-to-face contact with their new teammates, they may find themselves struggling to maintain team cohesiveness. Therefore, in this stage of a GVT's life cycle, the leader needs to DRIVE ACCOUNTABILITY, PERFORM MAINTENANCE, and AVOID SHARP TURNS to keep the journey on track.

DRIVING ACCOUNTABILITY – Members should be held accountable for adhering to norms created in the **SET-UP** phase (for example, answering emails within a specified timeframe and providing expertise during critical moments). What's promised should be delivered. In a virtual environment actions speak much louder than words; only when crucial deliverables are completed can cohesion develop.

What is the best way to engender trust? Simply, by having members conduct themselves in a predictable way. In a traditional team, trust grows through frequent face-to-face interactions where members learn what kinds of etiquette and responses are expected. Since virtual world relationships precludes face-to-face interactions, extra effort must be taken to adhere to the 'rules'. If the team agrees that emails should be responded to within 24 hours, or that team members should notify each other when planning long absences away from their workstations, then these commitments should be the norm.

Another common obstacle faced by GVTs is lack of accountability. When daily contact is not possible, members often forget that people in various locations depend on them for information and service. A leader can '*check-in*' and remind less responsive participants about jointly agreed upon norms. Additionally, s/he can establish a timeline and reprioritize deliverables in order to meet deadlines. Such supervision can also help to alleviate feelings of suspicion regarding a member's contribution (or lack thereof) to a project.

PERFORMING MAINTENANCE – During this phase, leaders should counsel team members to engage in frequent phone and/or email communication with each other. It may be necessary to repeatedly remind the team to keep the lines of communication open in unusual situations, such as exceptionally hectic workdays, systems failures, or family emergencies. A quick email or voicemail clears up potential misunderstandings, and also alleviates feelings of frustrations when someone is not responding to an urgent request. It may be necessary to divulge details (if time permits) that would be unnecessary to share if coworkers sat close by. Understandably, if teammates don't know why someone is communicating less (or not at all), they may assume that s/he is neglecting his/her responsibilities.

AVOIDING SHARP TURNS – You can be sure that even when teammates are trustworthy and engage in effective communication conflicts will occur along any GVT's journey. We call this SHARP TURNS. The challenge here is to spot these disagreements before they grow out of hand. While it is possible for a leader to pick up trouble brewing by reading emails, s/he may falsely assume that eventually the problem will work itself out, given teammates' different email styles. What steps can a leader take to avoid missing signals? First, proactively monitor any discrepancies or perceived confusion between member communications. For example, if a leader is apprised of emails that contain seemingly contradictory information, s/he should step-in and clarify the assignment or inquire about these discrepancies. In addition, 'flaming' or overly rude emails between members should be immediately addressed. Taking these easy actions will save the team from missing deadlines or producing poor quality output. Caution: SHARP TURNS to avoid include *Process Conflict, Identity Crisis* and *Information Overload,* discussed below.

PROCESS CONFLICT – Process Conflict occurs around 'how' and 'by whom' tasks will get accomplished. This involves resource delegation, such as who does what and how a specific resource is apportioned. In addition, three distinct types of process conflict exist – (1) work method or approach, (2) scheduling or timing issues, and (3) member contribution or workload distribution. Roles, schedules, timelines, methods and work distribution need to be defined and often redefined. To keep conflict at a minimum, the leader should distribute the tasks as equally as possible among teammates. This does not mean that the total number of tasks is equally divided among everyone. First, identify which ones are easier to complete and which ones are more time consuming. Recognizing that two easy tasks may equal one difficult assignment, divide res-ponsibilities according to this possibility. This avoids a situation in which one person feels overwhelmed, even though each team member is handling an equal number of tasks.

IDENTITY CRISIS – Often, employees serve as members of both GVTs and traditional teams in their home office location, which means balancing work responsibilities to both. At times, multiple priorities can seem overwhelming, especially when one team requires an excessive amount of time on a particular project. Another complication that could occur is the reluctances of some teammates to share sensitive information with someone who may have divided loyalties.

To avoid employee burnout, a GVT leader should remain cognizant of the team's various levels of responsibilities and divide tasks accordingly. S/he can also advocate a mentor program that provides additional support, where members can vent their frustrations about belonging to multiple project teams with those that have had similar experiences. This program can offer networking opportunities for those who may feel isolated from the larger organization.

INFORMATION OVERLOAD – Members of GVTs not only process a constant stream of emails that contain important bits of information, but also monitor group files and websites, sometimes in multiple versions. With so much information, it is easy to become overwhelmed. The team leader must ensure that an easy virtual filing system is created, with new revisions clearly marked as such. The team, however, should be held accountable for maintaining the storage procedure and utilizing the system correctly. We recommend periodic team discussions to assess the state of the virtual filing cabinet to ensure that protocol is being followed or to fine tune storage techniques, if necessary.

With these clear, easy to follow procedures in place, your team has a head start to handle the complexities of working in the VT environment.

REFRESH

During a team's natural lifespan changes occur because the project's original goals may undergo revision; in addition, new members join and others depart. Leaders need to keep members connected while SHIFTING GEARS, by performing TUNE-UPS and REFUELING.

SHIFTING GEARS – Since GVTs allow for flexibility in engaging, and disengaging specific expertise at any point, their makeup tends to change more than co-located teams. Members contribute their expertise and then move on to other projects. Handling transitions smoothly is necessary to maintaining a constant speed on the journey. Therefore, appropriate on-boarding materials – or *Rules of the Road* - should be available to new members so they can quickly get up to speed.

If possible, when someone new joins the group, a team conversation should take place. It helps to explain to the newest member why certain rules and policies are in place. Further, s/he can offer feedback from a new perspective and/or contribute new ideas. Although team veterans may not value such exercises, ignoring these rituals can destroy the cohesive culture that teammates have worked so hard to achieve.

Similarly, not marking one member's departure, and acknowledging his/her contributions, can decrease morale in remaining participants. Overlooking someone's accomplishments can lead other members to think that their own efforts are not valued, causing a decline in morale. To avoid this situation, collect *Lessons Learned* from departing members; doing so also helps ensure that ex-members will be inclined to speak positively about the team to others in the organization.

Changing leadership is another important transition in any team. Given its diverse make-up, successful GVTs require the collective cooperation and input from all members. New leaders should respect the team's dynamic and become knowledgeable about the current mode of operation before making major changes.

TUNE-UPS – even stable GVTs require the leader to periodically check-in to make sure that members have weathered the bumps in the road. These TUNE-UPS allow possible conflicts to surface early, so that they do not fester and potentially derail the project. It's also helpful to evaluate the technology in use on a regular basis since utilizing newer technology may facilitate communication.

When the leader performs this check-in, s/he has the option of assigning one member to solicit everyone's perceptions about the team's dynamics. Once gaps are identified, measures can be taken to rectify short-comings.

REFUELING - As additional time passes in the lifespan of a team, dips in energy may occur and new priorities can diminish the participants' level of commitment. The leader must be sensitive to the need to recharge batteries. When this occurs, the team can build shared understanding by taking advantage of blogs, which are increasingly popular. Blogs are a great forum for discussing work-related issues, and non-work matters, as members grow more comfortable with other. Companies like IBM have already discovered the benefits of allowing employees to blog, understanding that these interactions build community in a dispersed environment.

GVT members can also engage in *Happy Hour – GVT Style!* Although the team cannot gather after work for dinner or drinks, they can agree on a specific time to 'instant message' each other, relaxing while they chat. At first, questions can be scripted; as participants' comfort level increases these formal interactions will give way to natural conversation.

Often, GVTs are comprised of team members who work on a combination of GVTs and co-located teams. In these situations, the leader is the key link for his/her own GVT, interacting with other managers of co-located or GVTs to ensure that multiple priorities do not prevent work from moving forward. Shell Chemicals, a multi-national organization, for example, utilizes this type of linking, with leaders acting on behalf of their own GVT, negotiating time and work issues with home office or other GVT leaders. By communicating with peers to discuss common issues, their own team members can devote an appropriate amount of time to each project.

CONCLUSION

The life cycle of a GVT is a complex variation on a traditional theme – the team as central to work processes and flow. As it travels through the **SET-UP,** **FOLLOW-THROUGH**, and **REFRESH** stages, a GVT takes some steps that co-located teams do not. Some leaders may find these extra steps cumbersome and unnecessary. However, savvy leaders know when to take, not avoid, a step that means the difference between high performance and adequate results.

The reality is that GVTs are here to stay. Back in 2002, R. Emelo and L. M. Francis stated that by 2010 70% of the US population will interact virtually ten times longer per day than they do now.[2] Given the pace of globalization, this figure may be conservative. Today, successful leaders need to understand how the various demands of the GVT environment impact workflow in the attainment of formidable business goals.

With these clear, easy to follow procedures in place, your team has a head start to handle the complexities of working in today's GVT environment. That said, I hope that the *Rules of the Road* I've shared here guide leaders of 21C organizations to a successful tomorrow.

1. Dempster, 2005
2. Virtual Team Interaction, Training and Development, October, 2002

Yael Sara Zofi is the Founder and CEO of AIM Strategies®, Applied Innovative Management®, a New York City–based management consulting firm focused on bringing applied behavioral science techniques to leaders managing in today's global business environment. She works with leaders and teams on transformational initiatives that develop leadership, facilitate teamwork and create excellence. Prior to establishing AIM Strategies® in 1998, she was the Global Vice President of Performance Management for J.P. Morgan. As a Professor at New York University, she designed and taught various MA/MBA courses in Business Transformation, Leadership Practices and Management Principles.

For further information, visit AIM's website at: www.aim-strategies.com or email Ms. Zofi directly at: yael@aim-strategies.com