

Based on the acclaimed book by author Yael Zofi

A Manager's Guide to

VIRTUAL TEAMS

TEAM SETUP™ WORKSHOP FOR MANAGEMENT TEAMS

ACTIVITY GUIDE



AiM[®]
STRATEGIES
APPLIED INNOVATIVE MANAGEMENT[®]

a YAEL ZOFI company

BRIEF CONTENTS

EXIT 24

← VIRTUAL TEAMS 1

FOUR PILLARS 2 →

← TEAM SETUP™ 3

COMMUNICATION 4 →

← ACCOUNTABILITY 5

LEADERSHIP 6 →

← TEAM MAP 7

Detailed Contents

Preface

About the Author

Module One - Virtual Teams Overview

- Virtual Teams Definition..... 2
- Virtual Communication Squares..... 4
- Teams Then & Now 6
- Virtual Teams Facts & Trends..... 7
- Generations in the Workplace 8
- Vote With Your Feet..... 10
- Virtual Teams Myths vs. Realities..... 11

Module Two - Four Pillars Of Virtual Teams

- Defining High-Performing Virtual Teams 12
- Virtual Team Assessment Poll 13
- Gallery Walk 14
- Case Study: What Went Wrong?..... 16

Module Three - Team Setup™ Roadmap

- Team Roadmap Steps – Team Destination 18
- Team Charter Worksheet 20
 - Goals..... 22
 - Personal / Corporate 24
 - Management / Division..... 26
 - Clients / Competitors 28
 - Contingency Plans 30
- Team Charter Summary 32
- Virtual Team DNA..... 34
- Team Rules of the Road..... 36
- Case Study: Tamara’s Story 38

Module Four - Context Communication and Team Code

• Defining Context Communication	40
• Case Study: Onsite Maria vs. Virtual Maria Scenario	42
• Case Study Debrief	44
• Achieving Context Communication Within Virtual Teams	46
• Team Code Discussion and Construction	48
• Our Team Code – Group Presentations	50
• Drive	52

Module Five - Trust and Accountability

• GAME: Win As Much As You Can!!!	56
• Why Trust Is The Hardest To Build	58
• Wheel of Trust™ Model	62
• Case Study Debrief: The Broken Wheel of Trust™	63
• Trust Behaviors	64
• Trust Word Associations	65
• Road to Lasting Trust	66
• Engendering Trust	67
• Creating Trust Synchronization	68
• Your Wheel of Trust™	70
• Our Wheel of Trust™	72
• Behaviors and Actions	73
• Aligning Trust – Individual Journaling	75
• Where the Rubber Meets the Road - Action Plan	76
• Four Pillars of Virtual Teams Recap	78
• Deliverables Poll	79
• Virtual Conflict Mediation Techniques	80

Detailed Contents (cont'd)

Module Six - Global Leadership

- Your Best Global Leader 82
- The New World of Change 84
- The Accelerating Pace of Change 85
- Change: Danger or Opportunity 86
- Why Do People Resist Change? 87
- What’s Changing in Your World 88
- History of the World Part 21C 90
- The World as An Organization – Paradigm Shift 92
- SHAZAM! Organization of the Future 94
- Welcome! The World Is Now Your Organization 95
- From Agent of Change to Agent of Connection 98
- 7 Dimensions of GlobalLeadership™ 98
- GlobalLeadership™ Assessment 101
- GlobalLeadership™ Roles / Behaviors Dimension Grid 102
- Global Mindset Shift 104
- Giving Virtual “Pats on the Back” 105

Module Seven - Team Setup™ MAP

- Team Roadmap Steps – Test Drive 106
- Achieving Team Unity – MAP 108
- My Action Plan 114

Quick Reference

- 10 Tips For Setting Up a Virtual Team 116
- 10 Keys To Leading Successful Virtual Team Meetings 117
- 8 Guidelines For Using Voicemail 118
- 5 Guidelines For Conference Calls 119
- Tech Medium Summary 120
- Questions To Ask During Team Sessions 122
- 8 Characteristics Of High Performing Teams 123
- Learning Journal - Day 1 124
- Learning Journal - Day 2 125
- Daily Evaluation 127

PREFACE

With greater demands from global competition and fast-changing technology innovation, even the most talented managers are finding it necessary to rethink and retool to stay relevant, attract new talent, and manage teams effectively.

No one understands this more than Yael Zofi, Founder and CEO of AIM Strategies®. As an organizational development student at Columbia University, Yael began documenting the dramatic changes occurring with the advent of personal computers and the technology explosion that followed. She continued to track these changes while at JP Morgan serving as Global VP of Leadership Development.

In 1998, she started AIM® dedicating herself full-time to her research to help executives navigate the challenges to come. The culmination of her efforts came in 2011 with her book, *A Manager's Guide To Virtual Teams*. The accessibility of this text is a hallmark of her brand. Using common themes for quick delivery of complex details has proven successful in reaching busy audiences.

This activity guide, based on Yael's book, is filled with informative, thought-provoking activities designed to help new and seasoned managers better understand and connect with their virtual environments and teams. The highly-interactive and entertaining approach of the workshops this guide supports ensures greater learning and faster retention.

Content for this guide is presented in a 'plug and play' module format to allow greater customization. The modules can be conducted as stand-alone sessions or in combination for more flexible, creative and efficient facilitation. The 'Quick Reference' at the back of this booklet provides helpful tips to reinforce concepts covered in the workshop.

The workshop you are about to participate in is tailored to your organization with the understanding that no two organizations and likewise no two virtual teams within an organization are alike. Therefore not all modules in the Virtual Team suite of services are represented in this guide.

About the Author

Yael Zofi, author, educator and consultant is a sought after speaker on the topic of virtual teams and global leadership. She has worked with numerous fortune 500 companies and has appeared on Bloomberg.com, Forbes, and CNBC. A developer of many team-based assessment tools and international talent management programs, she has also facilitated global team strategy retreats and merger integrations of eight separate global organizations. Ms. Zofi teaches at the American Management Association and NYU, and holds a BS from Rutgers and an MBA from Columbia University.

Module One

VIRTUAL TEAMS OVERVIEW

Module One provides an overview of the fast-paced and constantly evolving business landscape influencing alternatives to traditional office, team and management structures while dispelling myths commonly associated with remote working environments. This module explores trends, costs, and comparisons to inform you of targets and high-level best practices from which to gauge your own virtual team development.

H i g h l i g h t s

- **Virtual Communication Squares**
- **Teams Then & Now**
- **Vote With Your Feet Activity**
- **Virtual Teaming As a Competitive Advantage**