Working Effectively in Virtual Teams

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Housekeeping Items

• Lines will remain muted.

• Dialog and questions are encouraged as they make for a more interesting discussion; however, please use the chat box.

• Chat box will be monitored and we will be addressing questions and comments periodically throughout.
We will discuss ...

- What’s a virtual team?
- Opportunities and challenges
- Managing mindsets, culture, processes and technology tools
- Using technology to engage your virtual team
- Wrap-up
- Q & A
Virtual Team

• A *virtual team* – also known as a Geographically Dispersed Team (GDT) – is a group of people who work across time, space or organizational boundaries with links strengthened by communication technology.

• A virtual team usually refers to a group of individuals who work together from different geographic locations and rely on communication technology such as email, FAX, and video or voice conferencing services in order to collaborate. [Wikipedia](https://en.wikipedia.org/wiki/Virtual_team)

• Virtual teams create *diversity* in the workplace
  – Cross-office, cross-practice, cross-culture
  – Team members have complementary skills and are committed to a common purpose
Opportunities and Challenges

Opportunities

- Being global citizens for clients
- Share knowledge resources and access diverse skills and experience
- Cost effective
- Knowledge about diverse markets
- Global workflow from one time zone to another; follow the sun

Challenges

- Language and cultural differences
- Unconscious bias
- Difficulties establishing “common ground”
- Fewer face-to-face interactions
- Requires continuous effort
## Team Behavior

<table>
<thead>
<tr>
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<th>Forming</th>
<th>Storming</th>
<th>Norming</th>
<th>Performing</th>
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<tbody>
<tr>
<td><strong>Local team</strong></td>
<td>Establish trust among team members and set goals and expectations</td>
<td>Conflicts identified early on, but can be more challenging to resolve face-to-face</td>
<td>Team members recognize and agree ways of sharing information and working together</td>
<td>More opportunities for evaluation and for networking</td>
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<td></td>
<td>Build comradery</td>
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<tr>
<td><strong>Virtual team</strong></td>
<td>Risk of stereotyping</td>
<td>Virtual nature may aggravate conflict</td>
<td>Difficulty in developing norms (standards)</td>
<td>More opportunities to participate</td>
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<td></td>
<td>Fewer opportunities for informal interaction</td>
<td>Less participation possible</td>
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<td>Competing pressures from local team</td>
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<td>Can be challenging to leaders</td>
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- **Forming** is the stage where trust is established among team members and goals and expectations are set.
- **Storming** is the stage where conflicts are identified early on, but can be challenging to resolve.
- **Norming** is the stage where team members recognize and agree ways of sharing information and working together.
- **Performing** is the stage where more opportunities for evaluation and networking are available.
Managing Mind Sets, Culture, Processes and Tech Tools
Why Do Virtual Teams Fail

• Research shows that a worrying two out of every three experienced managers fail in their first attempt at running a virtual team.*

• **Failure** nearly always occurs because teams try to apply the same rules and practices for virtual teams as they do for face-to-face team management. They don't consider what's different, and that's a huge mistake.

• **Four Key Issues***. There are four key issues that managers need to consider to ensure they don’t fail.
  – Lack of understanding
  – Poor communication
  – Using the wrong channels
  – Recruiting the wrong people

How Can Virtual Teams Succeed?

• Define work systems.
• Establish multiple communication tools.
• Schedule regular meetings
• Have cleared and detailed deliverables.
• Make sure work hours overlap.
• Create a professional work environment.
• Choose (video) calls over chatting and emails.
• Find the right people to work with.
• Establish a meritocratic system.
• Use project management tools.

https://www.entrepreneur.com/article/244197
Communication

• In a virtual team, we must work a little harder to share what we are thinking and what we need from one another. Remote meetings with team members are critical, but casual conversations are also important to strengthen relationships between team members.
  – Schedule video meetings whenever possible. Face-to-face connection goes a long way toward strengthening commitment and accountability.
  – Make time for informal conversations. You need to find a way to recreate the “hallway” conversations virtually.
  – Be clear and concise in written communications. Written communications will often take over where we would have had in-person discussions. Be sensitive to tone and content.
• Authentic relationships and transparency amongst leaders and team members are the foundation to strong, healthy organizational cultures. Create a sense of community with the team.
  – Make meetings fun. Start a meeting with a show and tell, ice breaker or other activity.
  – Arrange extracurricular virtual activities, such as cooking classes, yoga, coffee breaks, etc.
  – Take time during staff meetings to check in and ask what people are up to.

NOTE: Don’t forget to take extra time with people who are working remotely for the first time.
Employee engagement has always been key to a committed, productive workforce. Team morale and motivation are directly linked to an individual’s perceived feeling of value. When working in virtual teams, this must be done a bit differently.

- Allow people to share successes, especially small ones that may not make weekly or monthly reports.
- Use this time as an opportunity to invite team members to learn new things by attending virtual trainings.
Trust among members of the team is essential.

Engagement increases with frequency of meetings and collaboration opportunities.

Achievements, personal and as a team, should be recognized and used to build engagement and trust.

Membership needs to be kept under continuous review.
Trust and Engagement

• Loss of physical interaction and face-to-face synergies slows trust-building.

• Lack of face-to-face interactions forces team members to rely on assumptions, which may or may not be valid.

• Trust requires communication, calibration and relationship-building over time.
Achievements and Membership

- New team members need to be trained in how to be a virtual team member.

- A physical team that migrates to being virtual will need to evaluate its new team management approach.
  - Especially in the case when one member of the team goes virtual -- to them the entire team has gone virtual.

- Additional effort to recognize achievements is needed.
Culture
Culture

- **Culture** – Common ground of a group. Creating a sense of accountability in an effective team culture, team members understand where their individual work fits in the overall context of their organization’s strategic plan. This means creating a lot of personal accountability and heightening connections and dependencies between team member’s work.

- **Language** – Brings meaning, translation and misunderstanding. Remote, multilingual teams are common and provide a significant advantage since they allow companies to communicate with a larger percentage of people. When possible, however, team leaders should choose a primary language.

- **Communication** – How we send, exchange and receive information, as well as how we express our thoughts, ideas, moods and feelings

- **Skills and Awareness** – How familiar is your team with available technology to assist with working with virtual team members?
Virtual Teams Practical Considerations

Culture and Language
- National culture
- Organizational culture
- Language competence

Channels
- Email
- Messaging
- Audio and video
- Online (WebEx, Cisco Jabber)

Location
- Office
- Open plan
- Home
- On the road

Calendars and time
- Working week
- Time zones
- Public holidays
Culture

- National culture
- Office culture
- Team culture
- Professional culture
Considerations

• Engage in perspective-taking with the goal of understanding the experiences and constraints of colleagues

• Be aware of co-workers with different language, cultural backgrounds, proficiencies and experiences; leverage the differences

• Empathize
Tips for Clearer Cross-Cultural Communication

- Slow down
- Separate your questions
- Avoid negative questions
- Take turns and listen actively
- Avoid cutting the other person off
- Check meanings
- Write it down
- Avoid idioms and slang
- Avoid humor
- Maintain etiquette
Processes
Team Meeting Protocols – Set Expectations

• How and by whom will meetings be set up?
• What technologies will be used?
• How far in advance will materials be available?
• How will they be presented?
• Will there be an opportunity to provide feedback on the materials before the meeting?
• How will the meeting be managed?
• How will the meeting be recorded?
• What will the communications channels for the meeting be, and afterwards?
• How will team and individual performance be assessed?
• How will training and mentoring be provided?
• Allow team opportunity to provide feedback and ask questions.
Define the Purpose of Your Meeting

- **Communication** → To mutually exchange information; set expectations up front.

- **Coordination** → To assign tasks, organize and follow up. Team members understand what is expected of them, and one another.

- **Collaboration** → To successfully perform tasks together to achieve desired outcomes.
How will you be communicating?

Face-to-face  Video conf.  Audio conf.  WebEx  Instant message  Email  Team site

High richness / High immediacy  Low richness / Low immediacy
Preparing for Your Meeting …

• Before the meeting, send …
  – An agenda
  – Materials to review

• Ask a colleague to take meeting notes if possible. It is difficult to lead the meeting and take notes at the same time.

• Show up early to your session.

• Choose suitable technology for your meeting
  – e.g., audio or video conference
Practical Considerations

• Familiarize yourself with the technology that you will be using in virtual sessions.

• Make sure your team understands the technology also.

• Consider creating a shared team/department calendar. Train users and set expectations for using it.

• Have a backup plan.

• Have a strategy for virtual team technology support – e.g., file sharing, team spaces, meeting management applications.

• Organize on-site and online meetings, save both clients and team documents in FileSite workspaces.

• Follow up your meeting with notes.
Scheduling Virtual Meetings
Adding Your Regular Work Hours in Outlook

1. Click **File > Options > Calendar**
2. Choose **Calendar options** and set your start time, end time and work week under **Work time**
Adding National and Public Holidays to Outlook Calendar

1. Click **File > Options > Calendar**
2. Under **Calendar options**, click **Add Holidays** – Note that your own country will be selected as default
Choose the Best Time for Invitees with Outlook’s Scheduling Assistant
Adding a Second Time Zone to Your Calendar

In Outlook, click File > Options > Calendar

Under Time zones, enable Show a second time zone and set another time zone
Avoid …

• Meeting on a Monday morning or Friday afternoon

• Meeting the day before or after a holiday

• Starting a meeting during or after lunch (unless you are making it purposefully a virtual lunch meeting and arrange to have food served)

• Scheduling for some time zones that may be inconvenient.
Using Technology To Engage Your Virtual Team
Whether you plan a virtual meeting or start an ad hoc collaboration session, you can engage others via:

- Instant messaging
- Audio Conferencing
- Screen sharing
- Video conferencing
Jabber: Beyond Instant Messaging

- Make a call or start conference calls from your laptop even when traveling
- Play voicemail and access the recent calls log
- Call colleagues and clients directly from Outlook
- View your upcoming Outlook Calendar events
- Contact Firm Services via telephone, email or chat
- Set up and access fast dials
- Share your screen
- Reduce the number of emails by using instant messaging
Audio Conferencing
Scheduling a conference call

Learn in advance what audio conference call capabilities your organization may offer.

If there are questions, reach out to your trainers to see what reference materials and/or training classes may be available.

If you are working with a team that is not used to working remote/virtually, arrange for training classes in advance of important meetings, and schedule a test call to troubleshoot any issues.
Tip: Making it Personal - Record Your Name …

Did You Know? When you record your name in your voicemail greeting, colleagues will learn how to pronounce your name.
WHAT ELSE ARE EMPLOYEES DOING DURING A CONFERENCE CALL?

- Other work: 65%
- Sending an email: 63%
- Eating or making food: 55%
- Going to the restroom: 47%
- Texting: 44%
- Checking social media: 43%
- Playing video games: 25%
- Online shopping: 21%
- Exercising: 9%
- Taking another phone call: 6%

Best Practices for Participating in Conference Calls

• Be mindful of the audio equipment you are using:
  – Telephone, mobile phone or Jabber/IM
  – Handset, headset or speaker phone.

• Clearly state your name.

• Mute your phone when you are not speaking (*1).

• Keep background noise to a minimum.

• Pause for consideration.

• Keep participants engaged including those who haven’t spoken; make it a point to ask questions in a way that does not put people on the spot.
Sharing Your Screen
Working with Collaboration Tools
Best Practices When Hosting Online Meeting

- In Jabber/IM, enable the “Do not disturb” notification.
- For collaboration sessions with many participants, consider using the Share File option to use in your session features such as chat, raise hand, polls, and notes.
- Use WebEx/Zoom/GoToMeeting, etc. for real-time minutes taking.
- Turn off your Outlook notifications.
- Consider whether your session should be recorded for members who may not be able to attend.
Common Features of Collaboration Software

- Common features of collaboration software include:
  - Messaging
  - Audio
  - Video conferencing
  - Task management
  - Document Management
  - Calendars
  - Time tracking
  - Concurrent/co-editing
  - Ability to personalize your team meeting room
  - Present content or make someone else the presenter (“pass the ball”)
  - Use chat, raise-hand, whiteboard, multiple views, video, notes taking, polls features
Face-to-face meetings
Face-to-Face Meetings

You may conduct face-to-face sessions via:

• Firm’s video conferencing rooms
• WebEx
• FaceTime app on your Firm iPhone’s
• Cisco Jabber*
Best Practices for Video Conferences

2. Pace yourself: WebEx may display content a few seconds delayed, especially when using video. Pause between slides and thoughts. Allow participants to catch up.
3. Be mindful of your facial expressions, gestures and what you’re (or not) doing.
4. Pay attention to what you wear and your surroundings—others may get distracted.
5. Focus and engage.
Wrap Up
Someday …

I like the people I work with. Someday I'll meet them in person.

[Virtual teams get things done.]
Ten success factors

1. Have very clear objectives
2. Acknowledge skills, expertise and authority in the team
3. Lead differently
4. Develop guidelines for virtual meetings and for facilitating feedback
5. Distribute agendas and other materials prior to meetings
6. Build trust among members
7. Use Company technology in the best way possible
8. Learn more about colleagues through language and culture
9. Be dedicated to your virtual team
10. Embrace diversity of team!
More Information

- Communication Challenges – How to Navigate Remote Work Communication Issues – [HERE](#)
- Five Ways Remote Teams Can Communicate Effectively – [HERE](#)
- 10 Success Factors for Leading Virtual Teams – [HERE](#)
- Getting Virtual Teams Right (HBR) – [HERE](#)
- Leading Virtual Teams – But Real People – Effectively – [HERE](#)
- Successful Leadership of Virtual Project Teams - [HERE](#)
I hope you've found this informative. If you want more information, you can check out the article I published that inspired this talk called "Pandemic Planning Becomes a Strategic Advantage". You can find it in the Publications section of the ARMA NYC website.

All publications:
https://armanyc.org/legsandregs

Pandemic article – direct link: