

How to Make Virtual Teams Work

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Today's Discussion

- ❑ Introductions
- ❑ Background / Definitions
- ❑ Reasons for Virtual Teams
- ❑ How do we make Virtual Teams Successful
- ❑ Pitfalls and Lessons Learned
- ❑ Q & A

A Typical Conference Call ?



What is a Virtual Team?

Virtual teams are groups of geographically and/or organizationally dispersed co-workers that are assembled using a combination of telecommunication and information technologies to accomplish an organizational task (Malhortra).

***What are your expectations
for this session?***

What are your expectations for this session?

- Share Your Experiences With Virtual Teams:*
 - Have You Been On A Virtual Team?
 - Have You Led A Virtual Team?
 - What Are Your Issues/Concerns?

Some reasons for Virtual Teams

Allow Organizations To:

- Access The Most Qualified Individuals Regardless Of Location.
- Enable Organizations To Respond Faster / Reduce Time To Market
- Provide Flexibility For Workers and Employers To Work From Home or Locally
- Lower Facilities Costs / Less Space Required For Telecommuters
- Allow Companies To Tap Talent At Lower Cost Points.
- Allows For 24/7 Development
- Save Money On Travel Expenses

What Benefits Have You Observed?

Challenges for Virtual Teams

- Communication – Especially Non-verbal
- Lack Of Face-to-face
- Trust and Collaboration / Rapport
- Sense Of Community / Relationships
- Sense Of Ownership On/With The Team / Cohesion
- Creativity and Innovation
- Getting Everyone To Participate
- Managing Conflict / Timely and Effective Feedback
- Communication Difficulties
- Cultural / Time Differences

What Challenges Have You Observed / Experienced?

Best Practice – Strong leadership Skills

- ❑ *Virtual Project Leader Must Still Possess Strong Leadership and Project Management Skill*
 - ❑ Virtual Team Leadership Skills Are A Challenge Beyond The Basics
 - ❑ Distance and Lack Of Face-to-face Interactions Will Amplify Issues

What Leadership Challenges Have You Observed / Experienced?

Best Practices – Establish Rapport & Trust

- ❑ *Establish And Build Trust Early*
 - ❑ Very Hard To Create Later In A Project
 - ❑ Extremely Hard To Repair Virtually, If Damaged or Lost
 - ❑ Ensure All Members “Buy-in” To Project or Mission
 - ❑ Open & Honest Communications Necessary To Instill “Transparency” For Leader & Team Members
 - ❑ Leader Cannot Micromanage Team Members
 - ❑ Must Empower Them With Clear Goals & Expectations
 - ❑ Then, Help Them Remove Barriers As They Occur
 - ❑ Create Sense Of “Shared Destiny” Within Team
 - ❑ Foster Shared Leadership

Best Practices – Establish Rapport & Trust (cont.)

- ❑ *Create Rapport With Team and Be Virtually Present*
 - ❑ Be Approachable & Reachable
 - ❑ Hold Virtual One-on-one Meetings
 - ❑ Send Congratulatory Emails
 - ❑ Have “Office Hours” For Virtual Informal Discussions

What Best Practices Have You Experienced In Building Trust and Creating A Strong Rapport?

Best Practices – Communication

Communication is CRITICAL!

- ❑ *Utilize Appropriate Communication Tools*
 - ❑ Formal Technologies (Email)
 - ❑ Informal Technologies (IM, Texts, Etc.)
 - ❑ Computer Video Camera, Virtual Phone, Etc.
 - ❑ Create A Virtual Water Cooler
- ❑ Be Careful Of Written Communication –

***“What Was Read Is Often Not What Was Meant When
Written”***

Best Practices – Communication (cont.)

- ❑ *Establish & Utilize A Communication Plan With Team*
 - ❑ Get Input From Team
 - ❑ Obtain Commitment To Plan
- ❑ *Communicate & Track Commitments*
 - ❑ Provide A Deliverable Dashboard
 - ❑ Project Plan Tasks and Timeline Visible

Best Practices – Communication (cont.)

- ❑ *Early Face-to-face Meeting With All Team Members In Attendance*
 - ❑ It's Easy To Be Unpleasant To Someone You've Never Met (E.G. Tele-marketers!)
 - ❑ When Team Members Put A Face With Voice, Bonding Occurs, Trust and Rapport Are Built
- ❑ *Agree On A Shared Language And Terms*

***What Communication Practices Have You As Helpful
Or Unhelpful?***

Best Practices – Create a culture of success

- ❑ *Start Slow, Set Pace And Create Short-term Milestone and Wins*
 - ❑ Build Rhythm and Determine Teams Ability To Work Together
- ❑ *Execute Team Building Activities*

What Team Building Best Practices Have You Experienced?

Best Practices - Clarify tasks and Roles

- ❑ *Clarify Tasks And Roles*
 - ❑ Team Need To Understand “Who Is Doing What”, “Who Do I Go To For This” or “Who Can Help With This”
 - ❑ Team Should Understand Project’s “Big Picture” and How The Pieces Fit Together

***What Best Practices Have You Experienced In Task
And Role Assignment?***

Best Practices - Effective Team Meetings

- ❑ *Run Effective Virtual Team Meetings*
 - ❑ No Monologues – Force Interaction
 - ❑ Avoid Letting Anyone Dominate Meetings
 - ❑ Ask Frequent Questions
 - ❑ Call On People By Names & Get Everyone To Answer
 - ❑ Speak Slow, Use Short Sentences, Be Concise And Avoid Slang & Cultural Assumptions.
 - ❑ Make Implicit Explicit
 - ❑ Bring Out Quiet, Introverted Thinkers
 - ❑ Allow Time For Bonding – Work & Personal Topics

What has worked or not worked in your virtual meetings?

Best Practice – Set Ground Rules

- Set Ground Rules For Team:*
 - Don't Interrupt Each Other
 - Listen Carefully
 - No Multi-tasking During Meetings
 - Set Agendas Prior To Meeting
 - Three E-mail Rule
 - Treat Everyone Like They Are Physically Present In The Meetings
 - No IM'ing During Meeting (Meeting Under Meeting)

What other ground rule do you think would be helpful?

15 Ground Rules for Project Team – example

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1. Project manager is the primary contact for any project related communication.
 2. All team members maintain their contact info on the team contact list with contact preference.
 3. All members attend required meetings and conference calls; if unable to attend, meeting organizer to be notified. If key contributor is unable to attend, request to reschedule the meeting.
 4. Any planned day off or vacation must be communicated in advance to project manager so that project plan can be updated and impact to work, if any, can be analyzed.
 5. All project team members have access to project plan and project logs (in a standard document format) and are aware of the assigned tasks and due dates.
 6. All team members are to be consulted about the reasonableness of the plan prior to management approval.
 7. All team members are required to validate their assignments and time allocated prior to the plan is baselined.
 8. All project team members have the responsibility to proactively notify the project manager about tasks, duration or dependencies they believe are missing (or any other needed changes to the plan) and confront issues directly and promptly.

15 Ground Rules for Project Team – example

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9. Project team members have the responsibility to notify any potential difficulties in meeting the schedule for any assigned tasks as soon as it is known by the team member.
 10. Each project team member is responsible for ensuring anticipated workload conflicts with other assignments are brought to the attention of the project manager. Members should ask for help if feeling “stuck” or falling behind the schedule instead of waiting for miracle.
 11. All team members are responsible to own, follow-up and provide updates on the assigned task (including but not limited to any identified risks, issues, changes, approvals, clarification from customer). If any delay is observed, escalate to project manager.
 12. All meeting minutes, key decisions, assumptions and business rules must be documented and all action items must be followed up and assigned to a resource with expected completion date. These items are usually mentioned in casual conversation.
 13. All project team members understand the scope of work. Any work performed must be in the project plan and is in the project scope. Anything that is absolutely needed but not part of the project plan, must be brought into project manager’s attention.
 14. All project team members confront issues directly and promptly.
 15. Only project manager submits all final deliverables to business customer for sign-off or approval.

Pitfalls and Lessons Learned

- Country and International Issues
- Cultural Communication Differences
- Dealing With Time Zone Differences
- Resolving Personality Conflicts
- Establishing Trust and Sense Of Safety
- How Do You Create "Team"
- Escalating & Dealing With Performance Issues
- Development Of Skills

What other pitfalls have you experienced?

What are your lessons learned?

Questions and Answers

Articles

- ❑ *Virtual Teams: A leader's Guide* by Phillip L. Hunsaker and Johanna S. Hunsaker
- ❑ *Top 6 Best Practices for Managing Virtual Teams* by Star Dargin
- ❑ *Making Virtual Teams Work: Ten Basic Principles* by Michael Watkins
- ❑ *Virtual team effectiveness: The role of knowledge sharing and trust* by Mohammad Alsharo, Dawn Gregg and Ronald Ramirez