Getting Virtual Teams Right

"Virtual" teams—groups made up of people in different physical locations—are on the rise. As companies expand geographically and as telecommuting becomes more common, work groups often span far-flung offices, shared workspaces, private homes, and hotel rooms." - Harvard Business Review, April 2015

Real People –Virtual Workplace

In one global firm a recent survey indicated out of 1,700 knowledge workers, 79% reported working always or frequently in dispersed teams. Armed with laptops, Wi-Fi, and mobile phones, most professionals can do their jobs from anywhere at any time of day.

IOffiice® has a proven model using virtual rooms and places as a way to form productive virtual teams

The appeal of forming virtual teams is clear. Knowledge workers can manage their work and personal lives more flexibly, save money, and have the opportunity to interact with colleagues anywhere in the world around a 24-hour global clock. Organizations can use the best-qualified global talent and significantly reduce real estate costs. The planet benefits from reduced commuting and travel-related CO^2 emissions.

But virtual teams are hard to get right. Even today most people consider virtual communication less productive than face-to-face interaction, and nearly half admit to feeling confused and overwhelmed by collaboration technology.

So how do you create and lead an effective virtual team? There's a lot of advice out there, but through our research and our 2 decades experience forming productive global teams and helping organizations navigate collaboration challenges, we've learned that there are four must-haves:

1. the right team,
2. the right leadership,
3. the right touch points,
4. the right technology.

By following simple high-return practices for each, managers can maximize the productivity of teams they must lead virtually. The one caveat is, you must have your organization's buy-in and a budget that is adequate to fully realize expectations. Cost justification is essential so before starting any virtual team project have a plan with clearly defined objectives, time-lines and costs. And get it signed-off by the most senior executive in charge. Not getting senior people to buy-in is the single greatest factor in virtual team failure.

The Right Team

Once you have budget approval, team composition should be your next starting point. You won't get anywhere without finding (or developing) people suited to virtual teamwork, putting them into groups of the right size, and aligning tasks to appropriate roles.

People.

We've found successful virtual team players have a few things in common:

- excellent communication skills,
- high emotional intelligence,
- an ability to work independently,
- resilience to recover from snafus that inevitably arise,
- sensitivity to cultural diversity,
- high speed internet, headset mic
- adequate hardware & technical savvy,
- office space in the home or primary work area.

When building a team, leaders should conduct online interviews using the platform and tools intended for the team. If possible, invite an HR person to participate and advise. If you inherit a team, use the same tools to take stock of your people and assess their weaknesses; then train them in the skills they're lacking, encourage them to coach one another, and consider reassignment for those who don't make progress. Allow 30-days to form the team. Don't cut corners. It will show up in the long run.

Team Size.

Our work with companies from large multinationals to tiny start-ups has taught us the most effective virtual teams are small ones—fewer than 10 people. Research supports this. The worst performers had 13 members or more. "Social loafing" is one cause. Another is confusion over accountability.

Research shows that team members reduce effort when they feel less responsible for output. The effect kicks in when teams exceed five or more members. As groups grow, another challenge is ensuring inclusive communication.

The late Harvard psychology professor Richard Hackman noted that it takes only 10 conversations for every person on a team of five to touch base with everyone else, but that number rises to 78 for a team of 13. Thus to optimize your group's performance, don't assemble too many players.

Our model is teams with 7 touch points. Long ago we adopted the PRISM logo to reflect this. Four primary task points and 3 support points with one acknowledged leader managing both. Support points must include a senior executive with budget authority. We have found real success over 2 decades working and refining this model. Such teams can form bonds that last a lifetime, even when team members never meet physically.

Roles.

Our approach in virtual-teaming is similar to the X-team strategy advocated by MIT professor Deborah Ancona, who defines tiers or categories for team roles.

Our PRISM model has 3 tiers or role categories:

1. Core - built around required primary skill-sets
2. Operational Coordination
3. Support

The **Core** are team members accountable for performing the primary work the team is formed around. These are task-owners whose selection is based on specific skillsets determined at the planning and budgeting stage. Core team members must have a stake in the success of the project. They must believe in its purpose and understand the rewards they gain upon its success.

Operational Coordination defines the team leader role. Team leader must have direct supervision over the Core and true authority when interacting with the Support tier. The team leader needs sufficient competence with the skill sets of the Core to assure accountability. It is not a traditional manager role in that it is less command-control and more collaborative in nature. Operational Coordination is key to forming the trust-based relationships that make virtual teams work.

The **Support** tier must include the senior executive who has signed-off on the budget, along with those individuals whose primary responsibility is to assure Core team members have the resources needed to perform their work at the optimum level. The Support tier does not need to have regular contact with core, but must be familiar with the platform and have absolute commitment to the success of the team.

Truth be told executive leadership will need to defer to the team leader to sustain momentum. Nothing inhibits performance more than undermining the leadership role of the operational coordinator. Once the budget is signed-off the executive needs to have full-faith in the integrity and competence of the operational leader.

Often Support tier includes technical support from IT. This can cause conflicts if IT feels the team is involved in projects that affect its future. This is most apparent today as application development with advanced web-based tools is transformational putting content development, data access and analytical tools, previously under the control of IT, into the hands of new users.

Another issue we have encountered is dispersed teams from across divisions can often make better cross-division decisions than managers who have single-focus on their specific business unit. The issue is at the heart of transformation designed to make an organization leaner and more horizontal. Both issues need to be addressed at the time of budget sign-off.
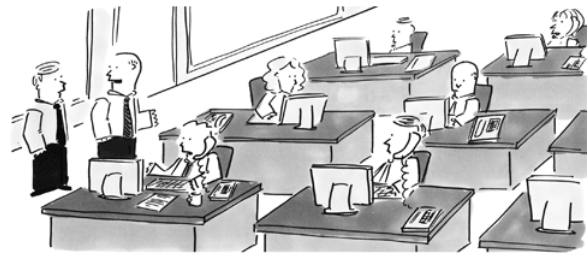
The Right Leadership

This addresses both executive and operational leadership. Our experience working with executives in government, financial services, education, technology sales, logistics, manufacturing, engineering and construction is that only the most innovative and self-assured executives are comfortable with the horizontal collaborative nature of virtual teams.

It takes courage to sign-off on a plan and budget that might change the direction of an entire organization and create internal conflicts at the most senior level. But that is inevitable if the organization truly embraces the concept that dispersed teams outside of the physical command-control office environment can define its future. The stronger the command-control culture, the more difficult it is for virtual teams to succeed. That said, we've seen even pilot-teams excel by practicing some key behaviors that, while also critical in face-to-face settings, must be amplified in virtual ones:

Build Trust With Constant Contact.

During my career I have experienced working environments where literally the boss is looking over your shoulder. Before office cubicles the office had managers in glass enclosed rooms and most office workers at rows of desks with absolutely no privacy. The comic view of a boss peeking out the door or looking out his window to see who was working was reality for decades. And still is in some offices.

© MARK ANDERSON WWW.ANDERTOONS.COM

"Actually, we're a two man operation. They're just ambiance."

The cubicle was the start of a process to increase the autonomy virtual teaming is built-upon. Still, many executives and managers want to see people at their desks by 8 AM. Some workers also feel they must be physically present in the office to work. It goes without saying some jobs require physical presence. In each of these cases virtual teaming is not recommended.

Today's knowledge worker must be a self-starter who can plan work and focus on tasks without prodding. But NEVER make them feel alone. Even on a global clock require a time-stamped sign-in with posted "I'm here" entry. We have developed an Instant Messaging app with both social and project team rooms as a way to record when a team member is on. We have a coaching method that not only brings the team together but also builds trust by establishing consistent expectations for regular posted updates.

We also recommend daily synchronized Skype sessions and weekly screen sharing and/or audio/video conferences. These are specific line items in the approved project plan which each team member's has as a required signature commitment. Rewards and even direct compensation are based on the archive record of the posted updates. Trust built around accountability is in the DNA of successful virtual teams.
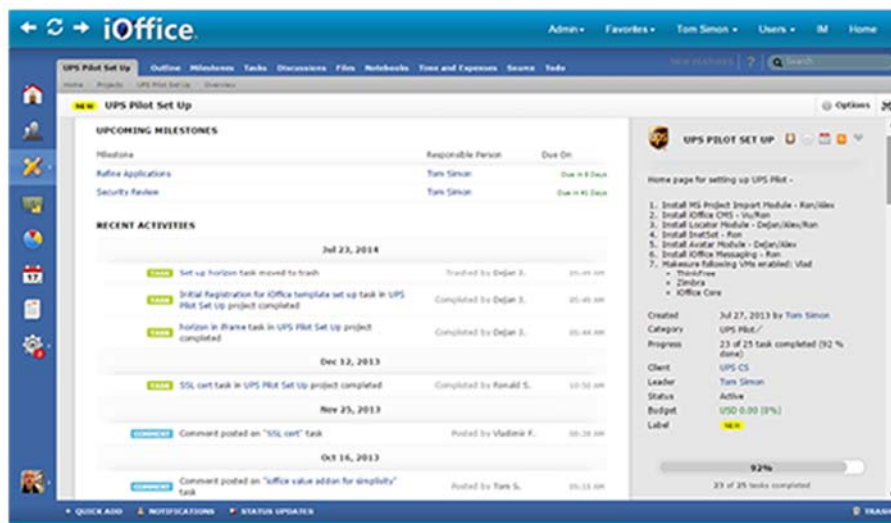
Encourage open dialogue.

When you've established trust, you've set everyone up for open transparent dialogue, or "observable candor"—a behavior that Professors James O'Toole and the late Warren Bennis described as a foundation of successful teamwork.

Having been at it for a long time, we have found that selecting team members with the attributes listed earlier, and using consistent daily posted asynchronous interaction, with regular synchronous screen shared audio sessions is enough to build the trust in each other that good teams virtual or otherwise require for success. Trust-built relationships are built on consistent transparent posted and archived dialogue where no one fears to tell the truth as they see it. This is also a good way to assure security is not compromised. When there is nothing to hide between team members, there is little to create the fear and mistrust that leads to security issues. More on security in the Right Technology section.

The Right Touchpoints

Being globally dispersed often means it is difficult or expensive to meet face to face. Video conferencing technology can overcome some of the hurdles when this is the case. But technology alone is not the solution. You need both process and tools to engage and sustain progress. Our process is to first provide clear goals and progress tracking that is easily accessible on the web. Then we have built into the approved budgeted Project Plan specific Formal Online Events in which every stakeholder in the project MUST participate.

Assure Clear Goals & Progress Tracking

iOffice® includes a built-in project management app that is integrated with Instant Massaging to coordinate discussions and align activity around clearly defined objectives, tasks, milestones and budgets.

If other PM tools are used by individual members, or support people, that is fine as long as they can be synced.

Today there are many web-based tools that can be easily integrated within our platform. We believe in using the best tool for the task at hand and embrace open source tools that are secure and easily integrated. The objective is to keep it simple and intuitive to manage progress. I must admit that many times interactive online discussions and screen sharing of progress is enough for the core team. But true project management is required to assure Support members stay in sync and that Executives sustain interest, and, more importantly are comfortable that financial and compliance accountability is in place.

Formal Online Stakeholder Events

A process must be in place to move through the forming, storming, norming stages of team work. We have identified a few formal events that when missing reduce the success of virtual teamwork:

1. ## Forming Event
   Online video conference session with sponsoring Executive to introduce selected team members and their assigned roles, outline corporate purpose, share the preliminary plan, set timelines and expectations and hear any objections or concerns that might alter or even cancel the virtual team involvement. Outcome is to set Launch Event Date and register team members into the platform so they can get a feel for it. Set up a training session when required.

2. ## Launch Event
   Assuming buy in from all stakeholders after the forming event, using the online conferencing module embedded within the virtual team platform, introduce the finalized Project Plan, verify task assignments, articulate clearly goals, expectations and timeline and begin daily interactive posting in the platform Instant Messaging app. This is a handoff from the Executive to the Team Leader in a way that establishes unquestioned authority – do not want team waiting for Executive to show up to get things moving. Outcome team leader takes command.

3. ## Scheduled Benchmark/Milestone Review Event(s)
   As described in the previous sections, the Team Leader with the Operation Coordination role will manage daily and weekly team sessions. In addition, based on the Project Plan or Statement of Work (SOW), there will be formal Benchmark review sessions to assure goals, expectations, timelines and budgets are on track. These are scheduled formal video conference events in which all stakeholders MUST participate. Any issues that might reduce progress needs to be aired with unquestioned resolution. A demonstration by each team member presenting their work as live screen sharing is essential. Kudos for good work – comments and questions aired if any concerns are raised.

   These are important sessions to assure Executive support of the Team Leader. Team Leader's ability to motivate will be on display. When we do an iOffice® project the SOW includes go/no-go decision points at key Milestones to assure accountability for contractually documented performance measures. It is recommended these sessions be recorded and archived.

4. ## Live Prototype Demonstration
   This is the final formal event in which the project is ready for sign-off review and/or phase 2 Beta Testing by targeted users. The team will be accountable for successful completion of assigned tasks. The team leader will be accountable to the Executive that the end result achieves expected agreed-upon performance objectives.

   I have participated in many of these final sign-off events and each time there is a combination of excitement in the delivered product and new ideas for making it better. The best outcome is increased value for the team and enthusiasm for the next phase or next project in the pipeline.

The Right Technology

In our experience, even top-notch virtual teams—those with the most-talented workers, the finest leadership, and frequent touch points—can be felled by poor technology. In addition to the iOffice®, there are many good options. In the end the right platform is one in which all members of the team feel most compatible to do their collaborative work. For globally dispersed teams a platform that is visually intuitive across language and cultural barriers is preferred. In all cases a single platform is necessary to avoid duplication and assure content is secure and each team member's activity auditable by a compliance officer.
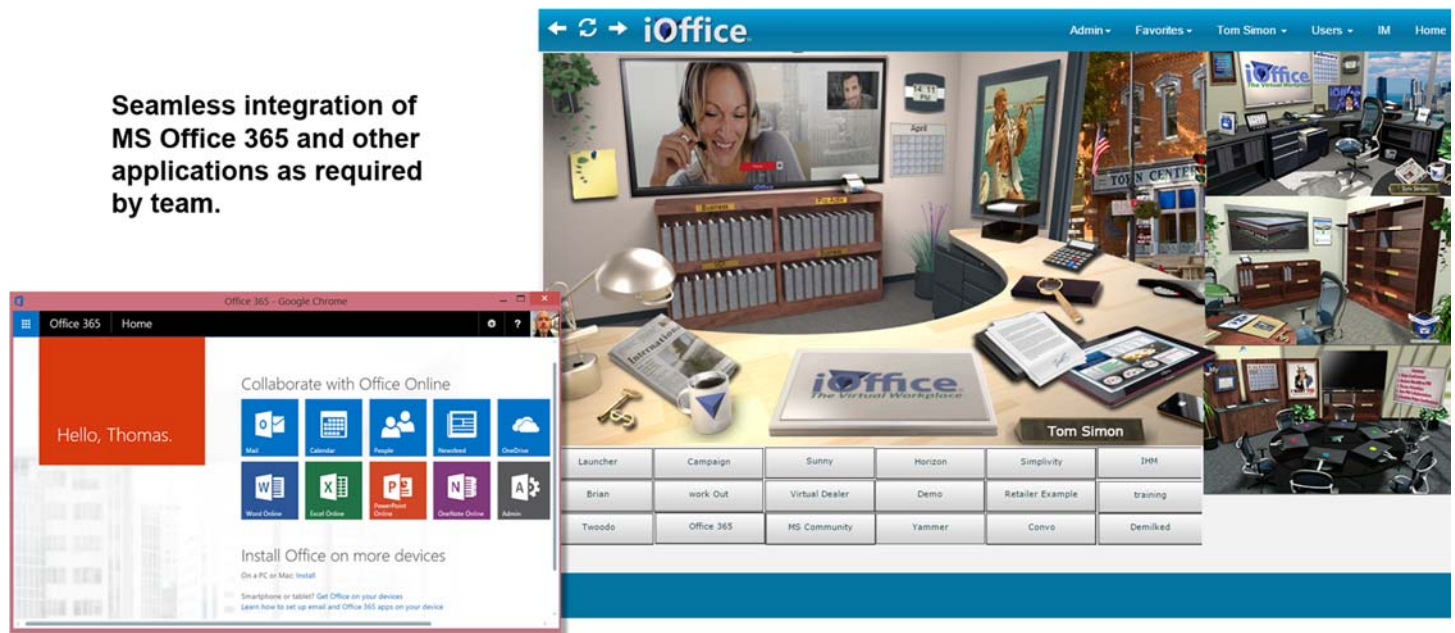
We recommend using a web-based browser desktop platform that integrates dash boarding, process modeling, document sharing and archiving, discussion forums, data analytics, content management, office productivity, and flexibility to integrate required legacy and new open source applications with intuitive secure single sign on simplicity.

Below are examples we have developed along with key components that can be integrated seamlessly:

An Online Work "Place"

Arriving at an office works the same in a virtual workplace as it does in a physical workplace. In my iOffice® all of the objects and artifacts replicate their physical counterparts. The coffee is steaming, the clock and calendar accurate. The laptop opens to an analytic BI dashboard. Interactive images on the wall and outside the window personalize the space. All of the objects can be set up and personalized by the team leader, support admin or user. Just like in a physical office, documents can be stored in binders and placed on shelves. The Inbox opens Outlook, the clock One Note, in our case, MS Office 365 opens with single click access to Word, Excel, PowerPoint, Lync,…
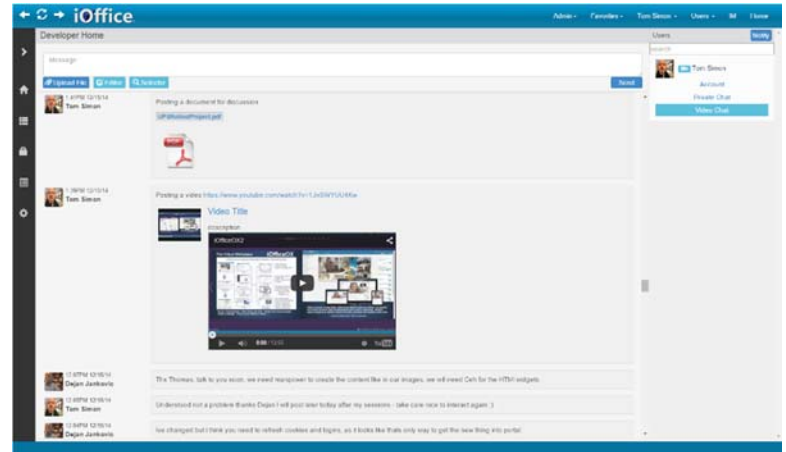
Seamless integration of MS Office 365 and other applications as required by team.

In one intuitive "place" 100's of context clickable objects can be arranged. Same for tablets.
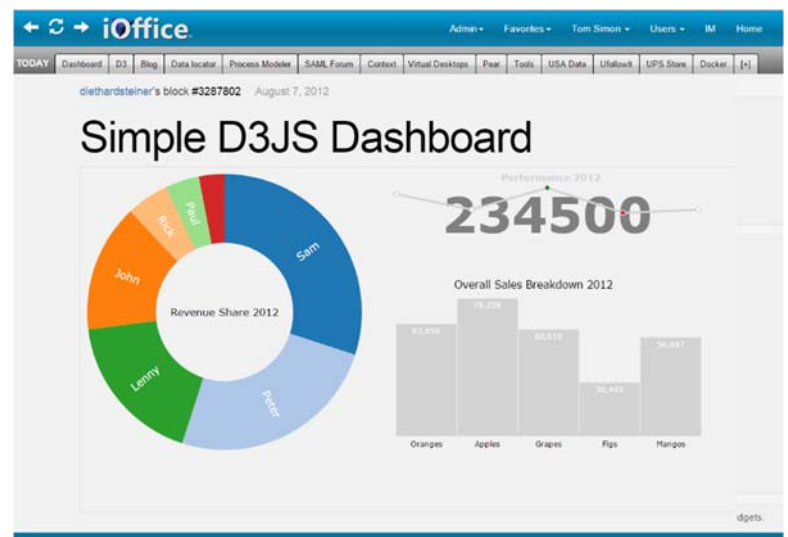
Instant Messaging With Archive.

Built as open source API, iOffice® provides an intuitive instant messaging module with easy video, document and file sharing. It sync's with project management and is seamlessly connected to all of the other tools and modules on the platform. IM enables archiving for compliance and provides public and private group chat as well as a private personal journal.

Dashboards & Analytic Tools

With so many great new tools for data analytics there is no excuse not to provide easy to assemble dashboards and visual data-driven business intelligence tools.
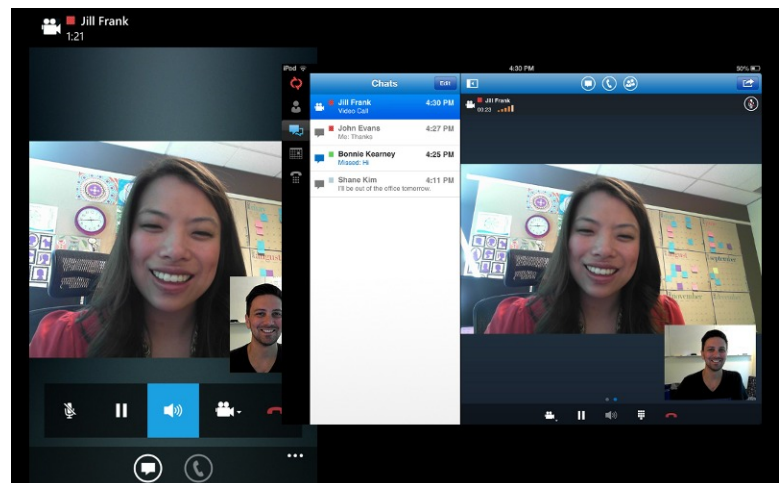
We have chosen to integrate D3.js. D3.js is an open source non-proprietary JavaScript library for manipulating documents based on data using HTML, SVG, and CSS. D3's emphasis on web standards gives the full capabilities of modern browsers, combining powerful visualization components for data-driven content creation.
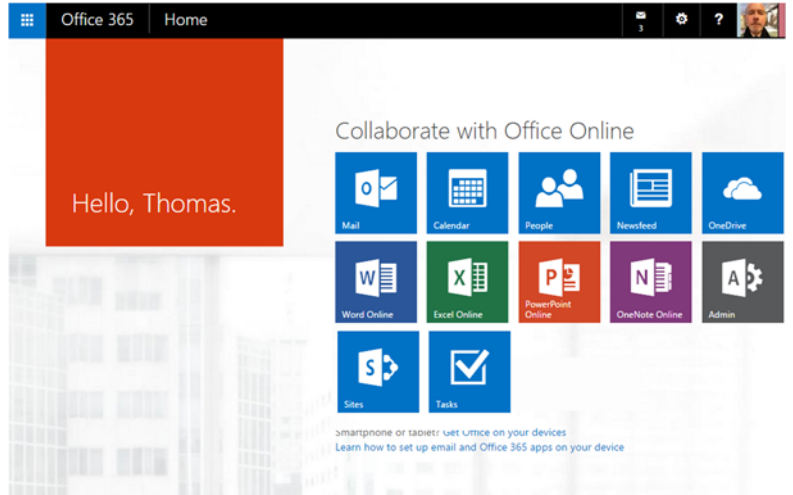

Live Video & Screen Sharing

iOffice® integrates MS Office 365 Lync which has seamless integration to all of the Office 365 apps. iOffice® uses Windows Live ID for secure registration and seamless SSO.

The downside is that requires a Microsoft license. The upside is Microsoft now is much more affordable. A Microsoft license opens up collaboration with hundreds of apps including many open source modules. Plus you can be confident it will not suddenly go out of business.

Cloud Apps Integration

When I began to build the **iOffice**® over 20 years ago, I started with Microsoft products. But like millions of other developers as the web evolved I gravitated to open source. Frankly it has been a struggle as each new platform and language wrinkle emerged it became difficult to keep up. So for several years I have been seeking to find a core platform I could finally settle on. I never imagined it would include Microsoft. But Office 365 is everything I ever wanted - and with surprisingly little effort I have found it integrates beautifully with our core **iOffice**® platform and just about any other cloud based app on the web.

Here is what one long time iOffice® user has to say:

*" OneNote is truly the unifying app we have needed. Now when I click on my **iOffice**® clock, I get my daily dashboard in a way that responds to the real world.*

*All my day-to-day apps are now single click access online. I no longer have to write scripts to make things work together. I have not had to give up all of the other great things we built for our **iOffice**® with Open Source tools. They all work great with Office 365 - and the scripts we now write have much deeper functionality.*

Now my very cool and very addictive graphic user interface is everything I dreamed it would be. "

About the author

Tom Simon is the originator of the iOffice® which began as the "Knowledge Web" while a consultant at Xerox in 1997. Simon provides consulting and team leadership along with the iOffice® virtual workplace platform, a bowser desktop, which can be deployed both as cloud-based and as custom server software and rack-ready infrastructure.

Web: MyiOffice.com - email: tom.simon@myioffice.com