

8

Essential Strategies to Lead Virtual Teams



Cynthia Clay

G A M E P L A N

If you are a manager in an organization that relies on virtual teams, then you are all too familiar with the challenges of leading team members in different locations. One definition of virtual teams is “groups of individuals that work across time, space, and organizational boundaries and who interact primarily through electronic communications” (Society for Human Resource Management, “Virtual Teams,” 2012). In fact nearly 50% of all organizations now rely on the work of virtual teams. Organizations have come to depend on them in order to recruit and retain top talent anywhere in the world, collaborate across geographic boundaries and reduce travel costs.

With the development of better web conferencing platforms, strong collaboration software, and enhanced project management and communication systems, the technological barriers preventing effective virtual teamwork have been lowered significantly in the past few years. However, these changes require managers to adapt their leadership skills to the realities of working virtually. Many experienced managers new to the virtual world report hitting obstacles such as:

- Poorly defined processes
- Inability to build team cohesion
- Time zone differences
- Workload distribution
- Communication challenges
- Lack of access to technology or technical support



To work successfully with dispersed team members, virtual leaders may capitalize on the 3C Model: Calibrate, Collaborate, and Celebrate. To calibrate the work of their team, they ensure that everyone has clearly-stated goals and expectations as well as progress-reporting systems. To collaborate, they build opportunities for team members to work together to achieve shared goals. To celebrate, virtual leaders plan time to appreciate and recognize results (in one-on-one conversations and team meetings).

Great virtual leadership happens with careful planning and conscious attention to the needs of virtual team members. In this ebook, we describe eight essential strategies (summarized in the mnemonic GAMEPLAN) applied by powerful virtual leaders. Your virtual GAMEPLAN can be used as a checklist to help you get the best results from your team. As you review these eight strategies supported by 19 management techniques, choose which ones you intend to implement. Here is the GAMEPLAN mnemonic:

G = Grow Trust
A = Attend to Diversity
M = Manage Accountability
E = Expect Teamwork

P = Plan Meetings
L = Leverage Technology
A = Appreciate and Celebrate
N = Nurture Relationships

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Grow Trust

1. Share and discuss cultural norms with every team member.

The culture of an organization surrounds all its activities, yet goes unnoticed consciously, like water to fish. Team members who meet face-to-face absorb cultural nuances each day. Virtual teammates may not share the same awareness. It may even seem as if they swim in a different ocean. To increase everyone's cultural awareness, communicate the organization's vision, purpose, and values in formal and informal conversations.



Take Action: How will you introduce, describe, and discuss cultural norms and values with your virtual team?

2. Set ground rules and expectations.

Virtual team members look to you as the team leader to clearly describe your expectations for communication, participation, and teamwork. You may choose to collaborate with your team to identify the ground rules for solid teamwork. Keep those ground rules handy and review them regularly with the team. Use them as a touchstone when a conversation may be veering off track. One team leader has collaborated with his team to identify the ground rule, "Be curious. Keep an open mind." He finds that all he has to do is remind the team to "stay curious" when they are involved in a difficult discussion.



Take Action: How will you set ground rules and expectations with your virtual team?



Grow Trust (*continued*)

3. Establish communication channels.

Virtual teams work best when everyone is on the same page about how, when, and what to communicate. Identify the right technological tools for the communication need. For example, a tool like Yammer might be useful for questions that need immediate responses. A private Facebook group might be the place to create a “virtual water cooler” for more social posts. A document-sharing site (such as SharePoint) might support team collaboration. (Of course your company or organization’s IT staff may have already negotiated contracts with software vendors to gain access to tools like these.)



Take Action: What communication channels would benefit your team’s ability to work together? What technological tools will you adopt?

4. Respect time zones.

For some teams, that may mean scheduling virtual meetings that avoid the lunch hour in any time zone. For other teams, that may mean that the office in Singapore gets to schedule the next virtual meeting during their daytime work hours. Pay attention to the tendency to schedule meetings for the convenience of a core group of staff in one location. Instead, vary meeting times to meet the needs of team members in other time zones. Some teams find it useful to consult a time zone scheduling website, such as [World Clock Meeting Planner](#), to find ideal times and to state meeting times in all the necessary time zones.



Take Action: How will you respect time zones when scheduling meetings?

To work successfully with dispersed team members, virtual leaders may capitalize on the 3C Model: Calibrate, Collaborate, and Celebrate. To calibrate the work of their team, they ensure that everyone has clearly-stated goals and expectations as well as progress-reporting systems. To collaborate, they build opportunities for team members to work together to achieve shared goals. To celebrate, virtual leaders plan time to appreciate and recognize results (in one-on-one conversations and team meetings).

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Attend to Diversity

5. Build virtual presence.

We define virtual presence as “the degree to which a leader is perceived as a ‘real’ person online.” Leaders who are willing to put themselves on camera (using their web cams) during virtual meetings find that ambiguous communication and misunderstandings are often reduced. Unfortunately, our research reveals that many virtual managers continue to rely on teleconference calls and emailed documents to conduct virtual meetings. We encourage you to take your virtual presence up a notch by adopting a good web conferencing platform (Adobe Connect, WebEx, or Microsoft Lync, for example) with the capability of streaming videos of the leader and team members.



Take Action: What will you do to increase virtual presence as the leader of your team? What will you do to encourage team members to increase their virtual presence?

6. Create a Talented Expert directory.

Operating without informal opportunities to connect socially, your virtual team may benefit from creating a directory of Talented Experts. Encourage everyone on the team to share their bios, describe their skills and experiences, talk about their passions, and upload photos. Help everyone get to know one another across time and space. It may be as simple as creating a folder for each person on a document sharing site. When forming a project team, ask everyone to check out their team mates’ information online.



Take Action: How can you build a Talented Expert directory for your virtual team?

Attend to Diversity (continued)

7. Respect cultural norms and differences.

If you manage a global team, pay attention to the cultural differences that may create confusion or conflict. Spend time introducing everyone on the team to the various cultural norms represented by virtual team members. Take the time to develop everyone's cultural competence.



Take Action: How will you build cultural competence on your virtual team?

Operating without informal opportunities to connect socially, your virtual team may benefit from creating a directory of Talented Experts. Encourage everyone on the team to share their bios, describe their skills and experiences, talk about their passions, and upload photos. Help everyone get to know one another across time and space.



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Manage Accountability

8. Set clear goals and targets.

Because virtual team members may tend to feel isolated without the daily connections and clarifications that can be made when working in the same physical location, it's vital that goals and targets are clearly stated. Skilled virtual team leaders report that they spend more time clarifying assignments in detail, checking for understanding and agreement. Clearly stated goals allow team members to focus on what's essential without wasting their time on unnecessary activities. Gaining their commitment to these goals and targets increases your confidence that they are working productively.



Take Action: How will you gain team members' commitment to clear goals and targets?

9. Create progress reporting systems to monitor responsibilities and results.

Many new virtual team leaders find they are uncomfortable with the need to manage performance and hold people accountable for results when they can't see what their team members are doing. Without this view into team members' ongoing activities, leaders may begin to micromanage activities and schedules instead of focusing on results. Indeed, dealing with a boss's micromanagement is one of the most frustrating challenges reported by virtual team members.

To avoid this pitfall, set up reporting systems and request that every team member use them. Have individuals post progress reports weekly. Develop the habit of checking the reporting system first before requesting additional information.



Take Action: What easy reporting system can you put in place to monitor responsibilities and results? How will you avoid micromanaging your virtual team?

Accountability

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1. Taking responsibility for your actions and the actions of your co-workers.

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Expect Teamwork

10. Encourage collaboration.

Because virtual team members may often work alone at home or in geographically-dispersed office locations, they may sometimes feel that their contributions are not welcome or that their ideas are not sought out. Look for problems that can be resolved collaboratively in team meetings. Seek input from virtual team members before making decisions that may affect them. Use generative thinking techniques to capitalize on the knowledge and experience of your virtual team. It might be as simple as requesting two suggestions to resolve an issue emailed to you prior to the next team meeting, or as complex as scheduling a virtual meeting to brainstorm ideas together, recording them on a white board in your web conference software.



Take Action: What will you do to encourage team collaboration?

11. Have sub-teams meet outside of team meetings.

Some problems or issues may best be resolved through a sub-team tasked with researching an issue and preparing a recommendation. Over time, if you give team members the chance to collaborate on different sub-team projects, you will likely strengthen team members' relationships while gaining better results.



Take Action: How can you create sub-teams to work on issues and problems?

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Plan Meetings

12. Prepare and send agendas in advance of team meetings.

Web conferencing software usually allows for desktop sharing, chat discussions, recording ideas on a whiteboard, and presentations using PowerPoint slides. However, most virtual managers quickly discover that they must fight the tendency for meeting attendees to multi-task. Sadly, many meeting attendees have developed bad habits from attending teleconferencing meetings in which they placed themselves on mute and went about their distracted business, listening with one ear to the meeting discussion.



It is critical that virtual leaders create clear agendas with planned interaction and engagement. Many virtual managers report that they take more time to carefully prepare meeting agendas for virtual meetings. Try segmenting portions of the meeting by the kind of thinking and participation you expect. For example, one meeting segment might be labelled “information sharing” while another might be identified as “idea generation” and still another as “decision making.” Alert team members that you expect full participation when you send out the agenda prior to the meeting.



Take Action: How will you prepare meeting agendas with opportunities for interaction and involvement by your virtual team?

13. Document discussions and action items.

Make sure that decisions and tasks are well-documented. You may choose to upload meeting outcomes to a document sharing site, or assign tasks through a project or task management system. Then review task progress or accomplishment at your next virtual team meeting. Build your team’s confidence that agreements and decisions result in action and achievement.



Take Action: What systems and processes might support you in documenting decisions and actions?

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Leverage Technology

14. Schedule regular virtual team meetings

Implement a web conferencing platform that provides strong interaction tools and use them often in regular team meetings. One virtual leader asks her team members to report each week on an accomplishment or goal achieved during the previous week. Then the leader has everyone chat about “What’s Hot” for the current week. These two standing agenda items ensure that each person knows just how hard everyone else is working and cuts down on uneven workload complaints that may mushroom when team members don’t work together face-to-face.



To create a level participation field, have every one log in at their own computer from their individual desks or offices. Avoid having a core team at the home office meet in a conference room while their isolated virtual colleagues log in from their separate locations. This common mistake reinforces the sense of disconnection often felt by those working virtually.



Take Action: How will you make sure your virtual team meets regularly (even weekly)?

15. Implement technological tools.

Leverage technology by using a tool such as Skype with video for one-on-one meetings and a web conferencing tool with video for regular team meetings. Useful technological tools now exist for task management, project management, collaborative meetings, shared workspaces, and instant messaging. Adopt the best tools for your team’s work. Consider having each team member learn one tool and train the rest of the team on how to use it. Introduce the first tool and allow everyone to get comfortable with its use before moving to the next tool.



Take Action: What technological tools would help your virtual team communicate easily and work productively?

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Appreciate and Celebrate

16. Celebrate milestones and results in team meetings.

Make sure that every team meeting includes time for the recognition and celebration of milestones and results. Invite team members to share their successes and applaud the results of their colleagues. This consistent practice helps to set a celebratory tone that motivates and inspires everyone to do their best.



Take Action: How will you build celebration and recognition into your team's practices?

17. Recognize individual and team contributions.

Providing acknowledgement and recognition to individual team members encourages strong performance, particularly if that recognition is tied to mutually-agreed upon goals and targets. You may choose to recognize individuals publicly in team meetings or privately in one-to-one conversations. One team leader recommends that virtual team managers include appreciation in every conversation they have with remote workers. Because these workers often feel "unseen," laboring out of the sight of their managers, regular appreciation increases their sense of engagement and inclusion.



Take Action: What can you do to frequently recognize individual and team contributions?



G A M E P L A N

Nurture Relationships

18. Get to know each individual personally.

Every one of us wants to be seen and celebrated for exactly who we are. Consciously take time to learn about each team member's hopes, dreams, and aspirations. In one-to-one conversations, find a few moments to connect on a personal level.

As a team leader, you may find this more difficult to achieve when working virtually. One team leader has earned his organization's support of his commitment to travel to each employee's work location at least once each year. He meets with his team members in their work locations, often taking them to lunch. His commitment to his team members is reciprocated by their commitment to the team's success. You may not be able to take people out to lunch or sit down with them face-to-face but you can certainly devote time and attention to learning more about their lives beyond work.



Take Action: How will you get to know each team member personally?

19. Focus on team members' career development.

Virtual team members often worry that their opportunities for cross-training and promotion may be reduced if they work remotely. Remedy this concern by scheduling career development conversations. Become an advocate for your team by helping individuals network with others outside your organization. Look for development assignments that help people grow. Help team members identify their aspirational goals and create development plans to support their progress. Build your reputation as the virtual team leader people want to work for.



Take Action: How can you ensure that your virtual team members progress in their careers?

The eight essential strategies and 19 related management techniques described in this ebook will help you build a high-functioning virtual team. Use the Virtual Leader Checklist on the next page to track your progress in implementing your GAME PLAN.

The Virtual Leader Checklist

8 Essential Strategies for Virtual Leaders

Grow Trust

- 1. Share and discuss cultural norms with every team member.
- 2. Set ground rules and expectations.
- 3. Establish communication channels.
- 4. Respect time zones.

Attend to Diversity

- 5. Build virtual presence.
- 6. Create a Talented Expert directory.
- 7. Respect cultural norms and differences.

Manage Accountability

- 8. Set clear goals and targets.
- 9. Create progress reporting systems to monitor responsibilities and results.

Expect Teamwork

- 10. Encourage collaboration.
- 11. Have sub-teams meet outside of team meetings.

Plan Meetings

- 12. Prepare and send agendas in advance of team meetings.
- 13. Document discussions and action items.

Leverage Technology

- 14. Schedule regular virtual team meetings.
- 15. Implement technological tools.

Appreciate and Celebrate

- 16. Celebrate milestones and results in team meetings.
- 17. Recognize individual and team contributions.

Nurture Relationships

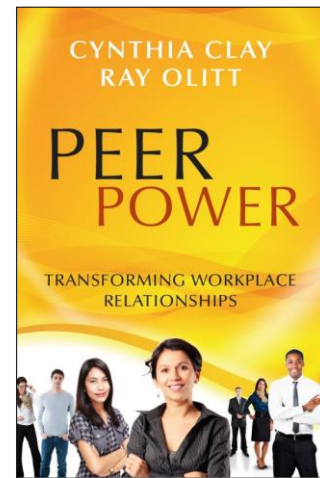
- 18. Get to know each individual personally.
- 19. Focus on team members' career development.

About Cynthia Clay



Cynthia Clay, CEO of NetSpeed Learning Solutions, has a passion for using technology in the service of learning. Ms. Clay leads a company that creates and delivers high-impact learning in the face-to-face and virtual classrooms.

She is a nationally recognized speaker on blended learning, virtual training delivery and applying social media tools to maximize learning retention and transfer, and is the author of *Great Webinars: How to Create Interactive Learning that is Captivating, Informative, and Fun* and the co-author of *Peer Power: Transforming Workplace Relationships*, both published by Wiley.



Introducing Our Newest Program: Virtual Leader™

Our new *Virtual Leader™* program is a five-webinar, blended learning program that develops the skills of virtual managers who can calibrate, collaborate, and celebrate successfully in a virtual work environment. If you would like to learn how you can bring this program to your organization, contact us at info@netspeedlearning.com.

Learn the Art and Craft of Virtual Facilitation

Our [Virtual Facilitator Trainer Certification™](#) course develops the skills of virtual facilitators who want to lead engaging, interactive online learning. We hold public sessions of the course six times each year, and deliver it privately for organizations with ten or more trainers.

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