Best Practices for Managing and Working with Virtual Teams
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Discussion Question

➢ What are your challenges managing and working on virtual (remote) teams?
Today’s Learning Objectives

- Increase the success of leading and working with virtual teams by:
  - Building a cohesive and committed team to ensure objectives are accomplished
  - Developing a communication plan and using communication tools effectively
  - Effectively managing conflict and problems that arise
  - Creating a virtual collaborative environment
  - Facilitating effective virtual team meetings

Virtual Team Success!

Effective Virtual Teams

- Mutually agreed upon team charter, team norms and operating agreement
- Clearly defined and shared: vision, purpose, goals, team objectives
- Concern and support for fellow team members
- Diverse members – a mix of perspectives, knowledge, skills, experiences
- Access to a variety of communication channels
- A strong team leader!

Remember: out of sight ≠ out of mind....
Great Virtual Team Leaders

- Inspire others
- Build strong relationships
- Facilitate problem solving and resolve conflicts
- Share leadership
- Be a coach
- Understand team members preferences
- Motivate the team
- Foster collaboration
- Share information regularly
- Remove barriers
- Put processes and procedures in place
- Empower the team

Consider... How effectively do you communicate and take on a leadership role on your teams?

The Challenges of Cultural Identities

- Participation in decision making/problem solving
- Dealing with uncertainty
- Communication expectations

The experiences we bring, our cultural background and how we expect to interact with others affects how we will work on a team.

Think about your last virtual team project. How well did you understand and work with various cultural backgrounds?
Building Strong Virtual Teams

- Kick off the team before kicking off the project
- Many options available
- Strong relationships are essential
- Get to know the team members
- Use team building activities
- Even for virtual meetings
- What cultural backgrounds are represented on the team?

Define Virtual Team Roles and Responsibilities

- 3 key team roles
  - Team leader(s)
  - Team members
  - Team sponsor(s)

Provide virtual team members with shorter assignments (2 – 3 weeks in duration).

Clearly defined and understood roles enables for increased effectiveness on the team.
Other Team Roles

- Team members can play a variety of key roles
  - Key point of contact for stakeholders
  - Lead sub-teams
  - Lead special teams
  - Key point of contact for regional area
  - Responsibility for monitoring team collaboration sites
  - Regularly checking in with/reaching out to junior team members
  - Providing training in areas where they have expertise

Effective Communications

- Work in conjunction with the team to develop the communication plan:
  - Communication needs
  - Communication paths
  - Communication channels
  - Communication response times
  - Communication status
  - Documentation procedures
  - Timing of communications

Regular “social” communication is essential in virtual teams to build rapport and strong relationships.
Best Practices for Managing Team Conflicts and Problems

- Set ground rules
- State the conflict clearly
- Clarify understanding
- Discuss areas of agreement
- Begin discussion
- Ensure listening
- Take a break
- Develop alternatives
- Evaluate win-win solutions
- Agree on solution
- Establish an action plan

Create an action plan:

- What will be done and how?
- By whom?
- When?
- How will the team know if it is successful?

Best Practices for Effective Discussions

- Prepare before the meeting
- At the meeting
  - Define the purpose of the discussion
  - Discuss processes
  - Set ground rules
- During the discussion
  - Clarify comments
  - Encourage participation
  - Summarize discussion
  - Manage time effectively
- Move forward with a decision

Use brainstorming techniques
Creating a Virtual Collaborative Environment

- Use a variety of ways:
  - Virtual meeting tools (Skype, WebEx, NetMeeting, etc.)
  - Internal collaboration portals (SharePoint, GoogleDocs, etc.)
  - Instant messaging
  - Email
  - Telephone/conference calling; video conferencing

Have a team directory for access by all team members.

Collaborative Virtual Team Environments

<table>
<thead>
<tr>
<th>Technology Used</th>
<th>Objective</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Sharing info/ getting answers/ document review</td>
</tr>
<tr>
<td>Teleconference</td>
<td>Effective</td>
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<tr>
<td>Email</td>
<td>Effective</td>
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<tr>
<td>Virtual meeting</td>
<td>Effective</td>
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<tr>
<td>Collaboration site/ portal</td>
<td>Effective</td>
</tr>
</tbody>
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Best Practices for Facilitating Effective Virtual Team Meetings

- Determine meeting goals
- Identify agenda items
- Organize high priority/heavy discussion items at top
- Send to all with expectations
- Be online early
- Start on time
- Audio record meeting
- Assign a timekeeper and note taker
- Evaluate effectiveness
- Set next agenda

Evaluate meetings via:
- Round robins
- After meeting survey

Mini Case Study

A virtual global project team was having significant difficulty in getting a major marketing project completed. The project was a strategic one for the organization and would place them ahead of the competition. The team consisted of employees from Germany, Hong Kong, US and Australia. Within one month of working together it was apparent to everyone on and off the team that there was quite a bit of dissension among the team members and the project leader was unable to handle the situation. The following were regular occurrences:

- Team members consistently missed virtual team meetings
- Team members did not follow protocols or processes
- Deadlines were missed regularly
- There were regular disagreements in meetings
- There was a lack of understanding of roles and responsibilities
Summary

- Leading or working in virtual teams is common in nearly every organization.
- Challenges are numerous and include:
  - Lack of cultural awareness
  - Lack of time spent developing relationships and building the team
  - Ineffective communications
  - Poor meeting management
  - Ignoring conflicts and problems
- Spend time up front enabling the team to get comfortable with each other.
- Develop processes and procedures jointly with the team.
- The more you invest in building a cohesive virtual team, the increase in the likelihood of a successful end result.

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Download the slide deck, templates and suggestions for virtual team activities: