

# Quick Guide for Virtual Teams

1	Tools for Communicating in a Virtual Environment .....	2
2	Tips for Using Communications Tools .....	3
3	Managing Teams in a Virtual Environment .....	5
4	Building Team Trust in a Virtual Environment.....	6
5	Monitoring and Fostering Success.....	8

## 1 Tools for Communicating in a Virtual Environment

Things to consider when selecting a communication approach:

- Speed of Interaction** Do you need responses immediately or can you wait a few hours or days for a response?
- Archivability** Do you need to save the conversation for legal reasons or for future reference?
- Speed of Set-up** Do you need to have an immediate conversation or do you have the time to set something up?
- Richness of Interaction** To avoid misunderstandings, is the tone of your voice or your message going to be critical?
- Accessibility** Are people going to be where there is a computer with network access or away from the office on a mobile phone?

### Analysis of Tools

Tool	Considerations				
	Speed of Interaction	Archivability	Speed of Set-Up	Richness of Interaction	Accessibility
E-mail	●	●	●	●	●
Phone Call	●	●	●	●	●
Instant Messaging	●	●	●	●	●
Text Messaging	●	●	●	●	●
Video Messaging	●	●	●	●	●
Voicemail/ Voice Messaging	●	●	●	●	●
Audioconferencing	●	●	●	●	●

- = high
- = average
- = low

## 2 Tips for Using Communications Tools

Tool	Tips
VOICE MAIL	<ul style="list-style-type: none"> <li>• Check voice mail every day.</li> <li>• Return calls within 24 hours.</li> <li>• If unable to check voice mail, record a greeting that informs others of your limited access.</li> <li>• When leaving messages for others, state your name and phone number at the beginning and end of each message.               <ul style="list-style-type: none"> <li>– Speak slowly and clearly</li> <li>– Be clear and concise about what you need, when you need it, and how you want to receive it</li> <li>– Leave complete phone number (including area/country code)</li> </ul> </li> </ul>
E-MAIL	<ul style="list-style-type: none"> <li>• If unable to check your e-mail for any reason, use the “out of office” alert.</li> <li>• Keep email messages short, (no scrolling required) and to the point. Briefly summarize information and if necessary send long quotes as attachments.</li> <li>• Don’t use emails for philosophical debates.</li> <li>• Assume that if you are sent a copy of a message (that is, if your address is listed after “cc:” rather than after “To:”), it is informational only, and no reply is required.</li> <li>• Be diplomatic as possible with your choice of words and remember that certain comments can come across as somewhat harsh in an email.</li> <li>• If you are writing a message while in an emotional or agitated state, save it for 24 hours; review and revise it as necessary before sending it.</li> <li>• Never use email to communicate sensitive information, to resolve interpersonal issues, or to avoid personal interaction.</li> <li>• Clearly identify the subject of the message in the subject line.</li> <li>• Use keywords in the subject line to help the recipient prioritize:               <ul style="list-style-type: none"> <li>– FYI means a non-urgent e-mail that contains something of interest.</li> <li>– ACTION BY (DATE): (SUBJECT) means that a response or action is needed by the given date — Respond immediately if you cannot make the deadline.</li> <li>– URGENT FYI means you should read the information immediately.</li> <li>– URGENT ACTION: (SUBJECT) means the recipient must read and take action on the noted subject immediately.</li> </ul> </li> <li>• “Reply to All” should be used only when all parties need to have your information; attachments to such replies should be deleted.</li> <li>• Review email lists regularly to be sure they are up-to-date; ask to be removed from old lists.</li> <li>• If there are more than three e-mail threads, make a phone call to resolve issue.</li> <li>• Spell-check all messages before sending.</li> <li>• Do not use ALL CAPITALS in the message body.</li> <li>• Remember, although email is a wonderful tool, it is no substitute for personal interaction. Also, we must treat people electronically the same we would in person.</li> <li>• Sign each message with your complete contact information.</li> </ul>
INSTANT MESSAGING	<ul style="list-style-type: none"> <li>• Log on to messaging when you first arrive at your office.</li> </ul>

Tool	Tips
	<ul style="list-style-type: none"> <li>• Turn IM off when you are in meetings.</li> <li>• Use “I am away” and “Do not disturb” features of the application when appropriate.</li> </ul>
CELL PHONES AND PAGERS	<ul style="list-style-type: none"> <li>• Remember to set your switch to vibrate mode during meetings.</li> <li>• Only answer urgent calls during meetings.</li> <li>• Consult other parties to see if they wish to use this method of communication.</li> </ul>
AUDIO- AND VIDEOCONFERENCING	<ul style="list-style-type: none"> <li>• If you are the conference leader, arrive early and establish the conference link.</li> <li>• Announce yourself at the beginning of a conference—don’t be a stealth participant!</li> <li>• Identify yourself each time you speak.</li> <li>• Use mute button, as appropriate, when you are not speaking.</li> <li>• Avoid engaging in any side conversations during a meeting; it is very frustrating for people not in the location of the actual discussion.</li> <li>• Notify the speaker immediately if you have a problem hearing someone.</li> </ul>

## 3 Managing Teams in a Virtual Environment

Tool	Tips
DECISION MAKING AND PROBLEM SOLVING	<ul style="list-style-type: none"> <li>• Base decisions on the best interests and goals of the proposal.</li> <li>• Keep the interests of both the local team members balanced with the entire team.</li> <li>• Consult the team member who is considered an expert before going outside the team for advice.</li> <li>• Set a goal for consensus, but realize that it takes time and is not always necessary.</li> <li>• Accept the expert team member’s opinion if consensus cannot be reached.</li> </ul>
CONFLICT MANAGEMENT	<ul style="list-style-type: none"> <li>• Keep in mind that conflict is a normal part of the team’s life cycle and that conflict can be healthy and productive if focused on the task and not team members.</li> <li>• Don’t let tensions build. It is more difficult to detect conflict in a virtual setting. Take the pulse of the team frequently to ensure that the conflict produces positive results.</li> <li>• Use the company code of conduct to resolve differences in ways of doing business.</li> <li>• Don’t use e-mail to settle differences. Always call and speak directly to the person first, not the team leader or another team member.</li> <li>• Establish a conflict management process, to include escalation paths.</li> </ul>
MEETING MANAGEMENT	<ul style="list-style-type: none"> <li>• Be on time for videoconferences, audioconferences, and other meetings, and attend the entire meeting.</li> <li>• Rotate time zones for meetings.</li> <li>• Link time and date to North American Eastern Standard Time (or whatever time zone is appropriate for the team).</li> <li>• Allow for breaks every 60 to 90 minutes during audioconferences and videoconferences.</li> <li>• Never interrupt others in any meeting.</li> <li>• Respect the facilitator’s attempts to foster participation from all team members.</li> <li>• Send out the agenda via e-mail no less than 48 hours in advance of every meeting.</li> <li>• Send out meeting minutes via e-mail no more than 24 hours after each meeting. Follow the agenda, and rotate taking minutes.</li> </ul>
WORKING TOGETHER TO PRODUCE OR REVIEW DOCUMENTS	<ul style="list-style-type: none"> <li>• Don’t review details of long documents on audioconferences; send out notes to the team leader or another person designated to integrate information.</li> <li>• When promised, give each other feedback.</li> <li>• When working in an “assembly-line” fashion, move the document through the system in a timely manner.</li> <li>• Send agenda items and updates to the facilitator by the same deadline every week.</li> </ul>

## 4 Building Team Trust in a Virtual Environment

Team trust is built on three factors: performance competence, integrity, and concern for the well-being of others. The following checklist describes each of these factors and provides examples of each.

Trust Factors	Examples
PERFORMANCE COMPETENCE	<ul style="list-style-type: none"> <li>• Develop and display competence.               <ul style="list-style-type: none"> <li>– Focus on individual and team results. Keep current in your technical area of expertise. Continue reading and learning about new skills, processes, and approaches.</li> <li>– Be open to new ideas and methods.</li> <li>– Be able to say, “I don’t know.”</li> <li>– Allow others to be experts.</li> <li>– Foster expertise and sharing on the team.</li> </ul> </li> <li>• Follow through on commitments and show results.               <ul style="list-style-type: none"> <li>– Keep a log of commitments and make them visible to the team through e-mail or another means. Have a method to ensure follow-through.</li> <li>– Keep promises even if circumstances have changed. Keep your commitments in cost, schedule, and technical areas. Inform team members well in advance if you will be late in any area.</li> </ul> </li> </ul>
INTEGRITY	<ul style="list-style-type: none"> <li>• Ensure that your actions are consistent with your words.               <ul style="list-style-type: none"> <li>– Align your behaviors at meetings, during reviews, and at other critical times to the values and expectations you want to promote within the team. Have team members you trust watch you and give you feedback on the consistency of your words and actions.</li> <li>– Conduct regular trust audits. If your actions are not consistent, explain why to your team members.</li> </ul> </li> <li>• Stand up for your convictions; display integrity.               <ul style="list-style-type: none"> <li>– Do the right thing in the best interest of the team or its members.</li> <li>– Be able to say, “I don’t agree” to those above you. Speak up for what you believe in with the team and with management.</li> <li>– Continue to do the right thing, even in a crisis or firefighting mode.</li> <li>– When appropriate, openly discuss your work-related convictions and values with team members and with management. Have an agenda item about this in team meetings.</li> </ul> </li> <li>• Stand behind the team and its people.               <ul style="list-style-type: none"> <li>– Keep up to date so that you can catch problems before you have to defend the team or any of its members.</li> <li>– Always investigate problems with the team before commenting to others about possible reasons for them.</li> <li>– Never speak negatively about the team to others.</li> </ul> </li> <li>• Communicate and keep everyone informed about progress.               <ul style="list-style-type: none"> <li>– Hold a regular audioconference, video-conference, or other meeting once a week and have an agenda that covers bad as well as good news.</li> <li>– Don’t forget people in remote locations and extended team members.</li> <li>– Post information and decisions so that everyone has access to them.</li> <li>– Ensure that everyone receives information in a timely manner. Use multiple, synchronous, asynchronous, and redundant communication methods.</li> </ul> </li> <li>• Show both sides of an issue.</li> </ul>

Trust Factors	Examples
	<ul style="list-style-type: none"> <li>- Formally present both the pros and cons of issues.</li> <li>- Post them on a Web site for the team members to read.</li> <li>- Create an environment for and schedule time for discussion and debate in team sessions.</li> </ul>
<p>CONCERN FOR THE WELL-BEING OF OTHERS</p>	<ul style="list-style-type: none"> <li>• Help team members with transitions.               <ul style="list-style-type: none"> <li>- Have a standard processes for selection, rewards, assignments, and sharing of information that do not favor certain people, functions, cultures, organizations, or locations.</li> <li>- Rotate the “good” and “bad” team jobs.</li> <li>- Help team members to transition off the team and to new assignments.</li> <li>- Assign partners to new team members for orientation and reassignment.</li> </ul> </li> <li>• Be aware of your impact on others.               <ul style="list-style-type: none"> <li>- Be aware that people are watching what you do, especially when you are a team leader.</li> <li>- Take your role seriously.</li> <li>- Take time to develop interpersonal relationships with team members, especially if team membership is permanent or long-term.</li> <li>- Ask someone you trust to describe how you affect others on the team in different situations (for example, in crises or with demanding customers).</li> </ul> </li> <li>• Integrate team needs with other team, department, and organizational needs.               <ul style="list-style-type: none"> <li>- Map how decisions on the team will impact other functional areas.</li> <li>- Ask others for their opinions about how the team’s behaviors impact functional areas before implementing changes. Have team members explore this as a team assignment.</li> <li>- Keep track of how decisions evolve and how they affect others on the team. Have team members report on how their decisions may affect other team members.</li> </ul> </li> </ul>

## 5 Monitoring and Fostering Success

Principles	Actions
GET ON THE BALCONY	<ul style="list-style-type: none"> <li>• Don't stay in the trenches</li> <li>• Look at what is happening from an overall point of view.</li> <li>• Look for larger patterns.</li> <li>• Give the team a background sense of history and values.</li> </ul>
IDENTIFY	<ul style="list-style-type: none"> <li>• Determine whether there is a precedent for the problem.</li> <li>• Talk to as many people as possible about the challenge, especially people outside normal networks and comfort zones.</li> <li>• Assess the roles of team members from high-uncertainty-avoidance cultures to minimize the adaptive content.</li> <li>• Determine the degree of adaptive change required of each team member.</li> <li>• Discuss and negotiate appropriate boundaries for work and tasks</li> </ul>
REGULATE DISTRESS	<ul style="list-style-type: none"> <li>• Determine the distress capability of each team member and a method for handling it.</li> <li>• Let the team feel the external pressure within a range it can tolerate.</li> <li>• Maintain healthy levels of stress.</li> <li>• Develop behaviors that help to suspend decisions while looking for unprecedented solutions.</li> <li>• Define communication strategies to aid team members who are experiencing stress. Arrange face-to-face meetings with team members and stakeholders who are undergoing the greatest degree of adaptive change.</li> </ul>
MAINTAIN DISCIPLINED ATTENTION	<ul style="list-style-type: none"> <li>• Develop communication strategies and technologies suitable for regular discussions to keep the work focused.</li> <li>• Frame the key issues and continually ask questions about them.</li> <li>• Focus and create a sense of urgency.</li> <li>• Ensure that communication technologies can communicate focus and sense of urgency. Develop strategies to deal quickly with distractive behaviors from outside and inside the team.</li> </ul>
RELY ON DISTRIBUTED INTELLIGENCE	<ul style="list-style-type: none"> <li>• Get team members into the habit of talking about their findings, even if they think they are not relevant.</li> <li>• Encourage team members to network outside of comfort zones and conventional areas.</li> <li>• When discussing a problem, ask every team member for information that is relevant.</li> <li>• Admit that the leader does not have all the answers.</li> <li>• Create an environment of developing solutions as a team.</li> </ul>
ENCOURAGE LEADERSHIP BY ALL MEMBERS	<ul style="list-style-type: none"> <li>• Identify leadership roles for team members to assume.</li> <li>• Allow leadership to emerge close to the action.</li> <li>• Clarify team accountabilities and vision with each team member.</li> <li>• Acknowledge and maintain overall accountability.</li> <li>• Practice redistributing leadership roles, given the problem at hand and the team member's area of expertise.</li> </ul>
ENCOURAGE ROBUST COMMUNICATIONS	<ul style="list-style-type: none"> <li>• Communicate failures as well as successes.</li> <li>• Create richly connected networks of mutually involved people.</li> <li>• When in doubt, over-communicate.</li> <li>• Rely on emerging technologies for virtual team communication.</li> </ul>
CREATE A LEARNING OBLIGATION	<ul style="list-style-type: none"> <li>• Make learning a part of the team's process from the beginning.</li> <li>• Ask the team members what they have learned from various experiences.</li> <li>• Use novel approaches to gain information.</li> <li>• Encourage team members to discuss problems and thoughts with a wide variety of people inside and outside the organization.</li> </ul>

Principles	Actions
	<ul style="list-style-type: none"><li>• Capture lessons learned and underscore the importance and benefits of learning in virtual teams.</li><li>• Look for the larger learning patterns, not necessarily the discrete steps that lead to the learning.</li></ul>