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Introduction



Welcome to Virtual Teams!

This workshop is designed to help you achieve greater success in your work, regardless of whether you are:

- Considering the use of a Virtual Team (VTeam)
- New to a VTeam
- Knowledgeable about VTeams
- Responsible for managing a VTeam

In any case, you are sure to find this workshop of value.

Virtual Team Myths

1. VTeams are the same as traditional teams
2. Speed is more important than anything
3. Face time isn't worth the money
4. Technology begets teamwork
5. Relationships don't matter

Introduction

Workshop Logistics

Please record the logistics for your particular workshop below:

Instructor:	
Length:	
Times:	
Lunch (approx.):	
Breaks:	
Facilities:	
Materials:	

Introduction

How to Get the Most Out of This Workshop

Generally, what people get from any workshop is directly related to what they put in. To help you maximize the value you derive from Virtual Teams, you should consider doing the following:

- Keep an open mind
- Respect others' views
- Participate
- Think about and apply workshop information in ways that will benefit you, your team, and your organization
- Ask questions any time
- Share your relevant stories
- Put aside other work and problems
- Avoid outside interruptions
- Dress comfortably
- Have fun!

Introduction

Workshop Objectives

Virtual Teams has been designed to help you accomplish a great deal in a short period of time.

By the end of this workshop, you will be able to:

- Define “virtual team” and identify characteristics
- Evaluate organizational support factors impacting teams
- Identify supporting influences for a virtual team and develop a virtual team charter
- Assess competency of potential virtual team members
- Select appropriate team members and then create group norms for a virtual team in a simulated situation
- Contrast various technologies available to virtual teams and practice facilitating a discussion through alternative media
- Survey distant communications and technologies
- Initiate trust building with a team member in a simulated situation
- Describe the importance of cultural impacts on a virtual team and assess potential cultural impacts on a team
- Appraise group dynamics and identify warning signs impacting a virtual team

Introduction

Workshop Outline

Use this outline as your guide for the Workshop.

Day 1

- Module 1 Defining Virtual Teams
- Module 2 Organizational Support for Virtual Teams
- Module 3 Virtual Technologies
- Module 4 Starting a Virtual Team

Day 2

- Module 5 Virtual Communications
- Module 6 Leading a Virtual Team
- Module 7 Cultural and Group Dynamics in the Virtual Workplace
- Module 8 Working Virtually
- Module 9 Lessons Learned

Introduction

Team Member *Meet and Greet*

Icebreaker Activity – Part One

Some of our team members are participating remotely today. It's important that we spend some time getting to know each other. Please take a few minutes to write a brief bio covering the items below. Be prepared to introduce yourself to the group.

- 1. Your name:**
- 2. Your location and job or function:**
- 3. Your experience with virtual teams:**
- 4. One key item you want to learn from this workshop:**
- 5. Your favorite recreational activity:**
- 6. Your contact information: phone or email**

Introduction

Team Member *Meet and Greet*

Icebreaker Activity – Part Two

Use the lined note pages in the back of your workbook to capture information about the members of our team. This information may prove valuable over the next two days. Be sure to pay particular attention to:

- **Individual names and how to pronounce them properly. Virtual teams rely on names more heavily to identify the person(s) being addressed. Don't be shy about asking for help with pronunciation.**
- **The work location and job or function of each team member**
- **Levels of experience and areas of expertise**
- **Ideas for getting the most value out of this workshop for you, your team, and your organization**
- **Things that team members enjoy outside of work**
- **Contact information in the event you need to reach team members outside of the workshop to complete an assignment**

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Module 1

Defining Virtual Teams

- *Define VTeams*
- *Challenges of a VTeam*
- *Benefits of a VTeam*
- *Types of VTeams*

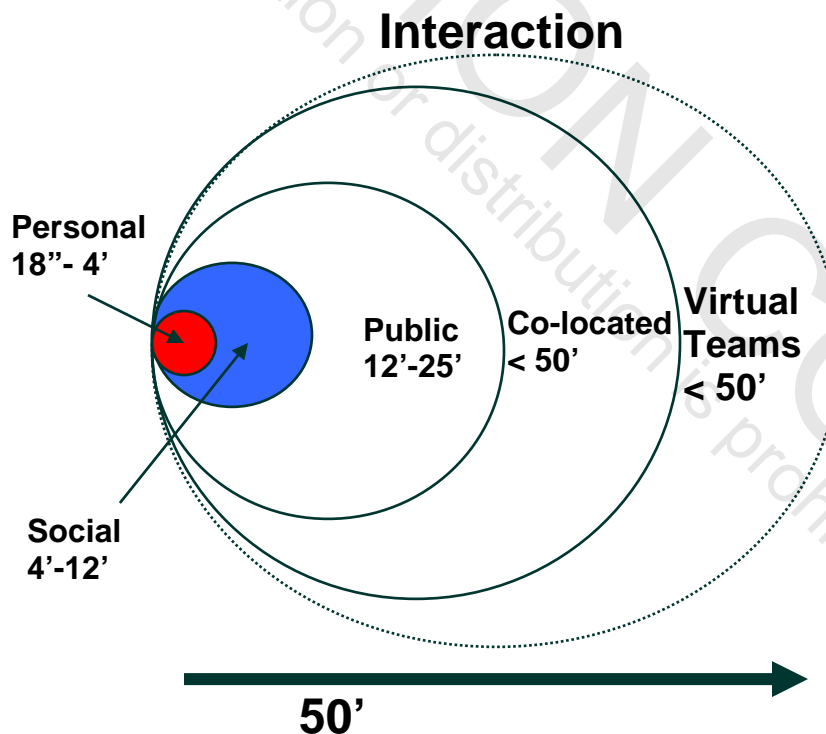
Defining Virtual Teams

The explosion in information and communications technologies has expanded the possibilities for people to work together. We are no longer dependent upon the same time zones and same physical locations for immediate interaction.

50 Feet Rule

When people are more than 50 feet apart, their likelihood of collaborating more than once a week is less than 10%.

Today, Virtual Teams affect almost everyone. According to data from MIT Professor Tom Allen, the amount of face-to-face contact between people drops dramatically when they are physically located more than 50 feet apart. Clearly, this includes members of groups in different cities and countries as well as those who work from a home office. However, VTeams also exist when members are located in buildings across from one another, or even located on different floors of the same building!



Defining Virtual Teams

What is a “Virtual” Team?

Virtual Team

Virtual team members are physically separated (by time and/or space) and interact primarily via electronic means.

Characteristics of a Virtual Team

- Members are mutually accountable for team results
- Members are dispersed geographically (nationally or internationally)
- Members work apart more than in the same location
- The team solves problems and makes decisions jointly
- The team usually has fewer than 20 members

Defining Virtual Teams

Traditional vs. Virtual

So, what's the difference between a **traditional** team and a **VTeam**?

Traditional Teams	Virtual Teams
• Members are co-located	• Members are geographically dispersed
• More static team membership	• More dynamic team membership
• All team members drawn from within the organization	• Team members can include people from outside the organization (clients, collaborators)
• Team members are dedicated 100% to the team	• Most people are members of multiple teams
• Teams are managed by a single manager (functional organizational structure)	• Teams have multiple reporting relationships with different parts of the organization at different times (matrix organizational structure)
• Position and authority are important	• Knowledge and capability are important
• Steady work environment	• Environment continually changing
• Information is “pushed” to members	• Information is “pulled” by members

Defining Virtual Teams

Challenges of a Virtual Team

A VTeam adds complexity to the business situation.

- Communicating across time zones can be a problem
- Geographic boundaries create differences in language, culture, technology, and goals
- Variety of team interactions
 - Same time – same place (face-to-face meetings)
 - Same time – different place (audio or video conference)
 - Different time – same place (chat room or shared work file)
 - Different time – different place (email or voicemail)

Defining Virtual Teams

Benefits of A Virtual Team

So, why use a VTeam?

- Work can be performed at different times to better suit the employer and/or employee
- Work can be carried out in locations most appropriate for the employer and/or employee
- Multi-skilled workers are able to undertake a variety of tasks
- Physical limitations of distance, time, and organizational boundaries become less of a barrier
- The use of electronic collaboration technologies can lower travel and facility costs, reduce project schedules, and improve communication
- “Islands of talent and expertise” are connected
- The disruption of people’s lives (e.g. uprooting and relocating) is minimized
- Time is saved by reduced or eliminated commutes to the office

Defining Virtual Teams

Types of Virtual Teams

Do you operate as part of a VTeam?

Most teams today can be defined as some sort of VTeam depending on the characteristics and functions performed by the team. Let's look at six types of VTeams. It is important to know the difference so you can set reasonable expectations.

Six Types of Virtual Teams*
1. Functional teams
2. Specialty teams
3. Project teams
4. Support teams
5. Management teams
6. Action teams

*Adapted from *Mastering Virtual Teams* by Deborah L. Duarte and Nancy Tennant Snyder, Jossey-Boss Inc, Publishers, San Francisco, CA, 1999.

Defining Virtual Teams

Functional Virtual Teams

Used to achieve a common goal.

- Consists of individuals in a given functional area who collaborate to achieve a common goal or purpose
- Frequently cross time, distance, and organizational boundaries
- Membership frequently is static
- Team members may not even be aware of all the individuals on the team

Examples:

Defining Virtual Teams

Specialty Virtual Teams

Used for short-term, unique functions with the ability to make recommendations.

- Carry out special assignments
- Frequently cross time, distance, and organizational boundaries
- Has a defined membership that identifies it from the rest of the organization
- Work together on a limited basis to make recommendations for improvements in organizational process or to address a specific business issue
- A common way for global organizations to make recommendations about worldwide processes and systems

Examples:

Defining Virtual Teams

Project Virtual Teams

For defined and non-routine tasks and to decide a course of action.

- Conducts projects for users or customers for a defined period of time
- Tasks are non-routine
- Results are specific and measurable (deliverables)
- Has a charter to make decisions, not just recommendations
- Members participate with the team *only* when their expertise is needed, yet the membership is distinct from the rest of the organization
- A final product/project outcome is specified by the team

Examples:

Defining Virtual Teams

Support Virtual Teams

Mainstream functions in partnership with other team members.

- Cross time and space
- Perform mainstream functions in partnership with other members by “transitioning work” from one member to another
- 24/7 teams (available 24 hours, 7 days a week)

Examples:

Defining Virtual Teams

Management Virtual Teams

A traveling management team.

- Performs same functions as co-located leadership teams
- Separated by time and distance, but not usually organizational boundaries
- Allows supervisors and managers to “travel” to critical locations, yet stay connected to the management team

Examples:

Defining Virtual Teams

Action Virtual Teams

Has a specific mission for immediate action.

- Offer immediate responses, often to emergency situations
- Frequently cross over distance, and organizational boundaries
- Have specific outcomes and authority to carry out the task

Examples:

So, what kind of VTeam are you a part of? Your team may be a *combination* of the types of teams we just covered!

Defining Virtual Teams

Key Learning Points for Defining Virtual Teams

- People are less likely to collaborate more than once a week if they are more than 50 feet apart
- VTeams are separated by time and/or space and primarily interact electronically
- VTeams are defined by the functions and tasks they perform
- There are six types of VTeams:
 1. Functional teams
 2. Specialty teams
 3. Project teams
 4. Support teams
 5. Management teams
 6. Action teams
- Your team may be a combination of types

Module 2

Organizational Support for a Virtual Team

- *Organizational Support Factors*
- *Identify Key Influencers*

Organizational Support for a Virtual Team

Organizational Support Factors

Is your organization ready to support VTeams? The best organizations incorporated these few simple principles: a clear purpose for the team, a focus on people, and concentration on the links that connect them.

To support a VTeam, there are five critical support factors for the organization to consider:

I. Strong Technology and Support

II. Sound Leadership

III. Accessible Education and Development

IV. Supportive Human Resource Policies

V. Supportive Organizational Culture

In order to benefit fully from the flexible working environment of VTeams, the culture of the organization and the style and skills of managers need to prepare and support it.

Organizational Support for a Virtual Team

Assessing Your Organization

Use this tool* to help you identify organizational support for a VTeam. Instructions: Check the response column that best matches your environment.

I. Strong Technology and Support	1 Weak	2 Average	3 Strong	4 Very Strong
1. The organization provides the necessary infrastructure and services to support the individual				
2. Individuals are competent in using electronic communication technology				
3. There is a budget to buy and support the latest technology				
4. Regardless of location, there is easy access to “tech support”				
5. There are agreed-on standards for using electronic communication tools				
Total points divided by 5 = average score []				

II. Sound Leadership	1 Weak	2 Average	3 Strong	4 Very Strong
6. Leaders set high expectations for VTeams				
7. It is accepted that the best ideas do not necessarily come from the most senior people				
8. Leaders understand the importance of occasional face-to-face interaction for VTeams				
9. Team leaders have experience working across organizational and cultural boundaries				
10. Team leaders are experienced in working in virtual environments				
Total points divided by 5 = average score []				

Organizational Support for a Virtual Team

Assessing Your Organization (*cont.*)

III. Accessible Education and Development	1 Weak	2 Average	3 Strong	4 Very Strong
11. Leaders allocate resources for VTeam education				
12. There is easy access to technical education				
13. There is access to education in working with other cultures				
14. There are methods available for continual and just-in-time learning, such as Web-based education				
15. There are mechanisms, such as lessons-learned databases, for sharing across boundaries				
Total points divided by 5 = average score []				

IV. Supportive Human Resource Policies	1 Weak	2 Average	3 Strong	4 Very Strong
16. Career-development systems consider VTeam members				
17. Skills, abilities and learning achievements are recognized through meaningful accreditation				
18. The organization rewards results				
19. Nontraditional work arrangements, such as telecommuting, are actively supported				
Total points divided by 4 = average score []				

Organizational Support for a Virtual Team

Assessing Your Organization (*cont.*)

V. Supportive Organizational Culture	1 Weak	2 Average	3 Strong	4 Very Strong
20. Mission and vision statements are encouraged and supported				
21. High trust is evident in the organization				
22. There is high trust between this organization and its suppliers and partners				
23. Teamwork and collaboration are the norm				
24. People from different cultures are valued here				
25. There are guidelines for team processes used throughout the organization				
26. Continual improvement of processes is encouraged				
27. The organization cares about the lives, careers, interests and well-being of its employees				
Total points divided by 8 = average score []				

*Adapted from *Mastering Virtual Teams* by Deborah L. Duarte and Nancy Tennant Snyder, Jossey-Boss Inc, Publishers, San Francisco, CA, 1999.

Organizational Support for a Virtual Team

Analyzing Your Results

Calculate your average score in each area by adding the numbers and then dividing that total by the number of questions asked in that area.

Critical Success Area	Average Score in this Area
I. Strong Technology and Support	
II. Sound Leadership	
III. Accessible Education and Development	
IV. Supportive Human Resource Policies	
V. Supportive Organizational Culture	
Overall average (total divided by 5) =	

Summary of Results:

Excellent - Scores of 3.0 to 4.0 in any one category and as an average of all categories

Moderate - Scores of 2.0 to 2.99.

Low - Scores of 0 to 1.99.

Organizational Support for a Virtual Team

Remedies for Low Scores

What if your scores are low?

Most VTeams do not start with a high degree of skill and experience. One ingredient to the success of a team is its ability to assess its strengths and weakness, and seek resources and guidance to improve.

Options

- Find a champion; someone who is a strong advocate for a Virtual Team and can help obtain the necessary resources
- Bring in help, someone who can help the VTeam get “kick-started”
- Investigate/benchmark other VTeams
- Have the team rethink the scope of their task --if the VTeam is not yet strong, then phase in responsibilities, adjust the timeline, reduce the scope

Organizational Support for a Virtual Team

Identifying Sponsors, Champions, and Stakeholders

Determine key players

Sponsor

- Allocates resources to the team and can also dissolve the team
- Works closely with the team leader and provides advice
- Acts on team's behalf to cross over organizational barriers
- Resolves conflicts of interest
- Provides a link to upper management

Champions

- Has a strong interest in the team's success
- Positive perceptions of the team
- Typically further removed from the team than the sponsor, usually a member of the organization's top management
- May also be able to secure resources, remove barriers, and provide advice

Stakeholders

- People and organizations that have an interest in or may be impacted by the team's success
- Potentially from different functional areas, geographic regions, management levels and partner organizations

Organizational Support for a Virtual Team

Review Key Learning Points for Organizational Support for a VTeam

- Organizations must provide an environment that embraces:
 - I. Strong Technology and Support
 - II. Sound Leadership
 - III. Accessible Education and Development
 - IV. Supportive Human Resource Policies
 - V. Supportive Organizational Culture
- Key influencers include Sponsor, Champions, and Stakeholders

Module 7

Working Virtually

- *Pros and Cons*
- *Challenges of Working From Home*
- *Best Practices*
- *Self Management*
- *Self Management Agreement*

Working Virtually

The Pros and Cons

VTeam members can operate from a variety of locations – home, on the move, other offices, hotels, conference rooms, etc. Working from remote locations has its advantages and disadvantages.

Perceived Advantages

Perceived Disadvantages

Working Virtually

Dealing with the Challenges of Working from Home

➤ Handling distractions

You will need to let everyone around you know in advance that you are at home working and still have the same responsibilities that you normally have in the office. You will have to gently and persistently break down the idea that you are not really working.

Do not assume that because you are working in your home that you can also take care of dependents during work hours. Telecommuting may give you more flexibility in meeting dependent care needs, but it is not a substitute for regular care. You cannot provide dependent care during your working hours.

➤ Budget for extra expenses

You may have extra expenses, such as the purchase of computer equipment, special insurance to cover business use of household items, possibly an extra telephone line, and higher utilities costs. Try to convince your employer to cover some of these costs. It is a good idea to seek professional advice regarding tax implications.

➤ Expect a period of adjustment

There may be an initial jump or drop in productivity. This period of adjustment should not go on indefinitely. Strive for an increase in productivity that can be sustained over time. If you cannot adjust after several months, then working from home may not be for you.

What kind of management support do you think people working from home need?

Working Virtually

Best Practices for Working Virtually

Tips for Working Remotely

1. Start your day early
2. Develop rituals to begin and end your work day
3. Go out for breakfast or lunch
4. Set outside appointments
5. Be at the phone numbers you provide
6. Take breaks throughout the day
7. Stick to a schedule and deadlines
8. Know who to contact for assistance, technical and otherwise
9. Stay in touch with the office and your supervisor
10. Work as if you are in business for yourself -- look for better ways to do things and focus on the customer, even if it is your supervisor and co-workers
11. Pace yourself
12. Hold a meeting with family/housemates to set up “ground rules” and boundaries
13. _____
14. _____
15. _____

Working Virtually

Self Management

Working remotely takes discipline and self-motivation.

Treat it like a regular workday

You don't have to wear a suit, but be sure to get up, get dressed and be ready for work--even if your commute is just a few steps to the den, rather than a long drive to the office.

Keep your normal hours

If you usually get into the office at 8 a.m., report to your home office at the same time. Some people like to "clock in" at the time they usually leave for work, rather than when they typically arrive.

Limit distractions

Get rid of the interruptions; from children, neighbors, friends, and so on. It is up to you to make them understand that you are "at" work. That converted spare bedroom is a real office. Provide them with your office hours and set the expectation that you should not be disturbed during these hours.

Set up a work area

Ideally, this should be a desk or table away from your usual living area, such as in the den or spare room. If space is tight, think "portable," creating a work station that gives you easy access to essential items like office supplies, the telephone and computer, yet that you can quickly pack up and tuck away at the end of the day.

Bring the right type of work home

Some projects, particularly those that require using huge volumes of files or resource materials, are better left for an in-office day. Tasks better suited to virtual work include reading, writing, making phone calls, data processing, and other jobs that can easily be performed independently.

Working Virtually

Self Management Agreement (SMA)

Set up a Self Management Agreement (SMA) listing the behaviors you wish to abide by when working remotely. Post your SMA in your workspace where it can be reviewed regularly.

Examples may include:

1. I will start work at [set time] daily
2. I will end work at [set time] daily
3. I will dress business casual during work hours
4. I will take at least 30 minutes for lunch
5. I will not attempt to solve family problems unless there is an emergency
6. I will go out to lunch at least once a week

Working Virtually

Key Learning Points for Working Virtually

- Know the advantages and disadvantages of working virtually
- Try to reduce distractions when working from home
- Working remotely takes discipline and self-management
- Recognize that working from home is not for everyone
- Consider the use of a Self Management Agreement