

Making Virtual Teams Work: Ten Basic Principles

by Michael Watkins

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Consider this now familiar view from the field:

“I’ve run a virtual team for the past 18 months in the development and launch of [a website.] I am located in Toronto, Canada. The website was designed in Zagreb, Croatia. The software was developed in St. John’s, Newfoundland; Zagreb, Croatia; Delhi, India; and Los Angeles, USA. Most of the communication was via email with periodic discussions via Skype. I had one face-to-face meeting with the team lead for the technology development this past December.”

Could this be you? Virtual teams have become a fact of business life, so what does it take to make them work effectively? On June 10, 2013, I launched a discussion around this question on LinkedIn. The result was an outpouring of experience and advice for making virtual teams work. (I define “virtual teams” as work groups which (1) have some core members who interact primarily through electronic means, and (2) are engaged in interdependent tasks – i.e. are truly teams and not just groups of independent workers). I distilled the results and combined them with my own work, which focuses on how new leaders should assess and align their teams in their first 90 days. Because that’s really when it’s most important to lay the foundation for superior performance in teams – virtual or otherwise. Here are ten basic principles for making this happen:

1. Get the team together physically early-on. It may seem paradoxical to say in a post on virtual teams, but face-to-face communication is still better than virtual when it comes to building relationships and fostering trust, an essential foundation for effective team work. If you can't do it, it's not the end of the world (focus on doing some virtual team building). But if you can get the team together, use the time to help team members get to know each other better, personally and professionally, as well to create a shared vision and a set of guiding principles for how the team will work. Schedule the in-person meeting early on, and reconnect regularly (semi-annually or annually) if possible.

2. Clarify tasks and processes, not just goals and roles. All new leaders need to align their team on goals, roles and responsibilities in the first 90 days. With virtual teams, however, coordination is inherently more of a challenge because people are not co-located. So it's important to focus more attention on the details of task design and the processes that will be used to complete them. Simplify the work to the greatest extent possible, ideally so tasks are assigned to sub-groups of two or three team members. And make sure that there is clarity about work process, with specifics about who does what and when. Then periodically do "after-action reviews" to evaluate how things are going and identify process adjustments and training needs.

3. Commit to a communication charter. Communication on virtual teams is often less frequent, and always is less rich than face-to-face interaction, which provides more contextual cues and information about emotional states – such as engagement or lack thereof. The only way to avoid the pitfalls is to be extremely clear and disciplined about how the team will communicate. Create a charter that establishes norms of behavior when participating in virtual meetings, such as limiting background noise and side conversations, talking clearly and at a reasonable pace, listening attentively and not dominating the conversation, and so on. The charter also should include guidelines on which communication modes to use in which circumstances, for example when to reply via email versus picking up the phone versus taking the time to create and share a document.

4. Leverage the best communication technologies. Developments in collaborative technologies – ranging from shared workspaces to multi-point video conferencing – unquestionably are making virtual teaming easier. However, selecting the “best” technologies does not necessarily mean going with the newest or most feature-laden. It’s essential not to sacrifice reliability in a quest to be on the cutting edge. If the team has to struggle to get connected or wastes time making elements of the collaboration suite work, it undermines the whole endeavor. So err on the side of robustness. Also be willing to sacrifice some features in the name of having everyone on the same systems. Otherwise, you risk creating second-class team members and undermining effectiveness.

5. Build a team with rhythm. When some or all the members of a team are working separately, it’s all-too-easy to get disconnected from the normal rhythms of work life. One antidote is to be disciplined in creating and enforcing rhythms in virtual team work. This means, for example, having regular meetings, ideally same day and time each week. It also means establishing and sharing meeting agenda in advance, having clear agreements on communication protocols, and starting and finishing on time. If you have team members working in different time zones, don’t place all the time-zone burden on some team members; rather, establish a regular rotation of meeting times to spread the load equitably.

6. Agree on a shared language. Virtual teams often also are cross-cultural teams, and this magnifies the communication challenges – especially when members think they are speaking the same language, but actually are not. The playwright George Bernard Shaw famously described Americans and the British as “two nations divided by a common language.” His quip captures the challenge of sustaining shared understanding across cultures. When the domain of team work is technical, then the languages of science and engineering often provide a solid foundation for effective communication. However, when teams work on tasks involving more ambiguity, for example generating ideas or solving problems, the potential for divergent interpretations is a real danger (see for example this Anglo-Dutch translation guide). Take the time to explicitly negotiate agreement on shared interpretations of important words and phrases, for example, when we say “yes,” we mean... and when we say “no” we mean...and post this in the shared workspace.

7. Create a “virtual water cooler.” The image of co-workers gathering around a water cooler is a metaphor for informal interactions that share information and reinforce social bonds. Absent explicit efforts to create a “virtual water cooler,” team meetings tend to become very task-focused; this means important information may not be shared and team cohesion may weaken. One simple way to avoid this: start each meeting with a check-in, having each member take a couple of minutes to discuss what they are doing, what’s going well and what’s challenging. Regular virtual team-building exercises are another way to inject a bit more fun into the proceedings. Also enterprise collaboration platforms increasingly are combining shared workspaces with social networking features that can help team members to feel more connected.

8. Clarify and track commitments. In a classic HBR article “Management Time, Who’s got the Monkey?” William Oncken and Donald L. Wass use the who-has-the-monkey-on-their-back metaphor to exhort leaders to push accountability down to their teams. When teams work remotely, however, it’s inherently more difficult to do this, because there is no easy way to observe engagement and productivity. As above, this can be partly addressed by carefully designing tasks and having regular status meetings. Beyond that, it helps to be explicit in getting team members to commit to define intermediate milestones and track their progress. One useful tool: a “deliverables dashboard” that is visible to all team members on whatever collaborative hub they are using. If you create this, though, take care not to end up practicing virtual micro-management. There is a fine line between appropriate tracking of commitments and overbearing (and demotivating) oversight.

9. Foster shared leadership. Defining deliverables and tracking commitments provides “push” to keep team members focused and productive; shared leadership provides crucial “pull.” Find ways to involve others in leading the team. Examples include: assigning responsibility for special projects, such as identifying and sharing best practices; or getting members to coach others in their areas of expertise; or assigning them as mentors to help on-board new team members; or asking them to run a virtual team-building exercise. By sharing leadership, you will not only increase engagement, but will also take some of the burden off your shoulders.

10. Don't forget the 1:1s. Leaders' one-to-one performance management and coaching interactions with their team members are a fundamental part of making any team work. Make these interactions a regular part of the virtual team rhythm, using them not only to check status and provide feedback, but to keep members connected to the vision and to highlight their part of “the story” of what you are doing together.

Finally, if you are inheriting a team, take the time to understand how your predecessor led it. It's essential that newly appointed leaders do this, whether their teams are virtual or not. Because, as Confucius put it, you must “study the past if you would define the future.” It's even more important to do this homework when you inherit a virtual team, because the structures and processes used to manage communication and coordinate work have such an inordinate impact on team performance. You can use these ten principles as a checklist for diagnosing how the previous leader ran the team, and help identify and prioritize what you need to do in the first 90 days.

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