

Instructions: Bring a hardcopy to class. Be prepared to discuss the assignment in class.

In a one-page paper (one page only**), double spaced, include the following:**

Discuss stage 3 of virtual team development from chapter 1 in *A Manager's Guide to Virtual Teams*. How is it different and/or similar for traditional teams?

The Three Stages of Virtual Team Development

When quicker, smarter, and more flexible work groups are in demand, virtual teams are the answer. These highly adaptive work communities are able to extract appropriate resources from the organization and are well suited to twenty-first-century business operations driven by globalization and technology innovation.

In this first chapter, I'd like to introduce an approach to virtual team development that I use with clients. It sets the tone for the rest of the book since all the other chapters follow this approach. As virtual team arrangements become increasingly popular, leaders continue to grapple with a profound issue—how to get team members to bond and form the energy so vital to pushing projects forward. With this in mind, I created this Virtual Roadmap as a practical blueprint to guide team members in achieving results in a complex and unpredictable business environment.

To gain a broad understanding of the nature of virtual teams, consider that the life cycle of a virtual team is divided into three separate stages, each with its own set of characteristics. They are:

- Stage 1: Setup
- Stage 2: Follow-Through
- Stage 3: Refresh

To bring these three stages to life, let's think of setting up a virtual team as taking a trip in your car along the virtual superhighway. How do you plan any trip? You need to clarify your destination, map your route, and follow the Rules of the Road. If it's a new car, you might conduct a test-drive, but very quickly you'll be speeding down the open lanes of the highway toward your destination. As you drive, you are alert to the other drivers on the road, so you avoid sharp turns and accidents. You may have to get off the road for a time or navigate around roadblocks before continuing on. Along the journey, you might have to stop to tune up or perform maintenance on the car. And if your destination is far enough away, a refuel is required. Once you reach your destination, you slow down and park your vehicle safely. But your journey has just begun!

Stage 1 — Setup: The Importance of Planning for Virtual Teams

Driving the virtual highway can be a daunting journey if you do not prepare yourself and your team for what lies ahead. Although it is impossible to foresee every difficulty that may arise, good planning is essential to set the stage so that your fellow passengers can concentrate on necessary activities and avoid hazards. Setup begins with determining and sharing the team's purpose, since every virtual team is formed around a business purpose. Without a shared purpose, virtual team members could easily focus on local tasks and concerns while excluding joint efforts to achieve organizational objectives. Teams that work across boundaries turn the intangible thing we call "purpose" into doable actions. "Purpose" is actually a system of five interrelated ideas that build one upon the other: vision, mission, goals, tasks, and results.

Just as poor first impressions are hard to overcome, early missteps in setting up your virtual teams may lead to unintended (and undesired) consequences, such as distrust among members and poor communications that adversely affect getting deliverables out the door. Clearly, a key responsibility of the virtual leader is to properly set the stage for a newly formed virtual team.

Before virtual teams embark on their virtual journey, you (as the leader) must navigate through three key steps: (1) clarifying the team's destination, (2) setting the Rules of the Road, and (3) conducting a test-drive.

Clarify the Team's Destination

Just as you would make the final destination of your journey known to a group of passengers traveling in your car, you need to share the project's goals with the entire virtual team before giving specific assignments or roles. Virtual teams carry an extra layer of complexity, of course, because team members are not sharing regular, in-person contact with one another. As a virtual leader, you must, above all, remain sensitive to the difficulty of developing a context of shared understanding. The leader is charged with making team introductions, and then defining and clarifying team goals, and most important, achieving a shared understanding of who is expected to do what to accomplish these goals.

For those situations in which you have the authority to select the team members, you will also be tasked with screening and hiring people. Once they are in place, you have to determine how each member will contribute to the "journey" and assign specific roles that are linked to the priorities outlined in the destination phase. Since a single manager can't possibly oversee all activities even at close range, additional self-management becomes essential for virtual teams.

Set the Rules of the Road

Leaders of virtual teams must create appropriate norms so that disparate elements, from a variety of functions, can coordinate efforts and create deliverables. Every team has a set of rules (or norms), even if they are unspoken. This code enables a diverse population to work with reasonable assurance that critical safeguards are in place to ensure mutual understanding about the nuts-and-bolts processes that are necessary to create products and services. Imagine that you are defining specifications for a new part and require answers from locations A and B,

where interlocking elements are manufactured, before you can proceed. If providing input at a critical impasse is not a high priority for them to address quickly, your deadlines will not be met. Understandably, having clearly stated norms that allow team members to hold each other accountable is a "must-have" for virtual teams.

Once these basics are completed, the team must find its own way to become a cohesive unit and achieve these stated goals. Opportunities that traditional (on-site) teams have for face-to-face contact (at the water cooler, in the hallway, in the cafeteria) do not exist in the virtual world, so it is harder for members to establish common ground and develop a common identity. Without these opportunities, you need to find other ways to build team unity.

To counter a lack of comfort that we may have with other people of diverse backgrounds, cultures, and skills, it helps to create norms. Norms become central to the team's workflow. They are a virtual team's Rules of the Road, helping to guide team members' interactions around, for example, (1) communications, (2) deadlines, (3) decision making, (4) conflict management, and (5) information sharing. The rules need not be complex; in fact, simple rules simply stated work best, because they avoid the potential for misunderstanding caused by differences in cultures and languages. Each of these five interactions needs to be codified so that team members are free to focus on their responsibilities for team success.

Setting these "rules" includes developing a Team Code, or a common language of specific phrases and acronyms used to standardize processes and procedures.

Conduct a Test-Drive

The last step in Team Setup (see Figure 1-1) is the virtual team's test-drive. This is the group of activities that a manager takes to assess team members' capabilities and their ease (or lack of ease) with team communication. During this step, you engage in group and individual conversations with team members to gain a better understanding of each person's personal and professional needs, wants, goals, and motives.

Figure 1-1. Team Setup.

Stage 1: Team Setup	Activities
• Team's Destination	• Clarify team's destination (goals, roles, responsibilities).
• Rules of the Road	• Establish Rules of the Road (norms, communication, expectations, goals, time lines, decision-making and information-sharing processes, priorities). • Allocate resources (equipment, tools, technology).
• Test-Drive	• Run a test-drive (1:1 meetings, team building).

Stage 2—Follow-Through: The Importance of Implementation and Performance

Follow-Through is how you ensure that the team adheres to norms created and agreed upon during the Setup phase. Leaders must remain vigilant so that the team practices agreed-upon procedures; they must be sure that straightforward feedback mechanisms exist to offset the lack of physical proximity and that communication flows in both directions. Holding members accountable requires effective Follow-Through in a number of areas, including performance management cycles, conflict resolution techniques, and bridging cultural differences, so that momentum is maintained and business objectives are met.

Stage 2 along the Virtual Roadmap is the heart of virtual team performance because it reveals how virtual teams execute or drive toward goals. As summarized in Figure 1-2 and discussed here, there are four key aspects of Follow-Through that are at the core of the virtual manager's responsibilities: (1) opening communication lanes, (2) driving accountability, (3) avoiding sharp turns, and (4) performing maintenance.

Open the Lanes of Communication

Because of the difficulties of creating strong communication in virtual work arrangements, it is essential to put in place structures and processes that facilitate communication. Virtual managers should establish a culture of frequent updates. It may be necessary to repeatedly remind the team to keep lines of communication open in unusual situations, such as during exceptionally hectic workdays, systems failures, or family emergencies. A quick telephone call clears up potential misunderstandings and also alleviates feelings of frustrations when an urgent question is not answered. It may be necessary to divulge details, if time permits, which would be unnecessary if coworkers sat in close proximity.

Information technology is the main contact vehicle for virtual team communications, but it brings with it a variety of issues, from technical difficulties to unfamiliarity with use. To prevent feelings of frustration, managers need to make comprehensive training available. In addition, virtual teams should agree on a point of contact to streamline the problem-solving process.

Drive Accountability (and Trust)

In the virtual environment, actions speak louder than words, and the cohesion that is so critical for teamwork develops when people can count on each other. Commitment leads to trust. Plainly said, if a team member promises to do or explain something, that person should deliver on that promise.

What is the best way for leaders to engender this commitment? By embedding predictable checkpoints in team procedures and processes. In an on-site team, trust grows through frequent face-to-face interactions where members learn what kinds of etiquette and responses are expected. Although virtual teams lack regular face-to-face exchanges, they nonetheless have expectations to meet. If, for example, the team agrees that e-mails should be responded to within twenty-four hours or that team members should notify each other when planning long absences away from their workstations, then these commitments should be the norm.

Another common obstacle faced by virtual teams is a lack of accountability. When daily physical contact is not possible, members often overlook the fact that colleagues located elsewhere are dependent on them for information and service. A leader can “check in” and remind less responsive participants about jointly agreed upon norms. Additionally, the leader can establish a timeline and reprioritize deliverables to meet deadlines. Such supervision also helps to alleviate feelings of suspicion about a team member’s contribution (or lack thereof) to a project.

Avoid Sharp Turns (Managing Conflict)

Even when teammates act in ways that engender trust and engage in effective communication, it is not realistic to believe that all conflict can be avoided along a virtual team’s journey. Just as drivers need to stay alert to avoid hazards on the road, the challenge for virtual teams is to spot these disagreements or “sharp turns” before they grow out of hand. The virtual manager must learn to pick up on missing signals and take remedial action, rather than assume an issue will eventually work itself out without an intervention. Taking even simple steps can save the team from missing deadlines or producing poor-quality output. The sharp turns that a virtual team must avoid happen in three areas, which will be explained more fully in future chapters:

- *Performance Conflicts.* Such conflicts occur around the issues of “how” tasks are accomplished and “who” should do them.
- *Identity Crisis.* This type of conflict arises when virtual team members also work on other teams.
- *Data Overload.* Welcome to the wonderful world of ubiquitous technology!

On every journey, roadblocks appear; however, being aware of potential issues before they rise up makes you better prepared to resolve them.

Perform Maintenance (Deliverables)

The primary purpose of any team is to contribute to the process of getting deliverables out the door. For virtual environments to produce these deliverables within financial, quality, and time constraints, certain conditions must exist. Goals must be clearly stated and understood by all. Procedures and processes should be put in place that take into consideration multiple time zones, language barriers, cultural differences, and various skill sets and degrees of fluency with the primary language (a tall order indeed!). And virtual managers must infuse the team with the spirit to sustain the human connection, which leads to strong relationships so critical to coordinated efforts. Regardless how competent the team is at project management (a key requirement in day-to-day work tasks), there is no better foundation for getting deliverables out the door than a well-thought-out operational structure to facilitate that human connection.

Figure 1-2. Follow-Through.

STAGE 2: Follow-Through	Activities
Open Lanes of Communication	Create strong communication (develop a context of shared understanding, hold regular meetings, share information).
Drive Accountability (and Trust)	Engender commitment, trust, and accountability (update, modify goals, keep team on target).
Avoid Sharp Turns (Manage Conflict)	Resolve conflicts and misunderstandings (handle roadblocks, evaluate problems, build or strengthen relationships).
Perform Maintenance	Sustain team performance (update deliverables, modify goals).

Stage 3—Refresh: The Importance of Realignment

During a team's natural life span, changes occur because the project's original goals may undergo revision; in addition, new members join and oth-

ers depart. You need to keep members connected while shifting gears by performing tune-ups and refueling. Business imperatives often require teams to apply a steady energy and focus to work through their alignment issues, and managers must use appropriate tools and techniques to ensure that a long-standing team renews this dedication. In addition, membership is not static. Virtual teams are flexible work arrangements, with members continually arriving or leaving the group, and so their makeup tends to frequently change. When team members contribute their expertise and move on, it is necessary to handle transitions smoothly.

Stage 3 of development along the Virtual Roadmap includes the following steps: (1) doing a tune-up, (2) refueling, and (3) putting it in PARK.

Do a Tune-Up

Even stable virtual teams require the leader to periodically check in to make sure that members have weathered the bumps in the road. These tune-ups allow possible conflicts to surface early so that they do not fester and potentially derail the project. It's also helpful to evaluate the technology in use on a regular basis to identify new ways to facilitate communication.

It is possible that some team members do not perform at an adequate level, which may signal that it is time to "replace parts" by either reassigning roles to other capable team members or bringing new members on board. A thorough review of expectations should take place, not only to clarify the tasks but to ensure that the additional responsibilities are doable. If a new member joins the team, then the onboarding process needs to take place.

Identifying areas for improvement, making new role assignments, and acquiring new members may further signal the need for additional training to keep knowledge and skills current. Training should build upon prior learning from the group's experience, incorporating best practices and insights on better ways to accomplish goals. In addition, if new tools and techniques have been created since the team's inception, then all members should be trained in those areas appropriate for their own responsibilities. At this point, the team should reestablish norms or create new ones that reflect the team's growth.

Refuel

The more time spent on the team, the greater the possibility of dips in a team member's energy and commitment level. Virtual team leaders must be sensitive to people's need to recharge their batteries, but within limits and in ways that are suitable to the organizational culture.

For example, team members can engage in *happy hour*, virtual style. Although gathering after work for dinner or drinks is not possible, VT members can agree on a specific time to instant-message (IM) each other for informal chats of a nonbusiness nature. At first, questions can be scripted; then, as participants' comfort level increases, these formal interactions should give way to natural conversation. Often, one or more members are congenial and enjoy bringing a social dimension to the group. Virtual leaders should stay alert to this possibility and encourage those who seek to energize colleagues.

Often, VTs are made up of people who work on a combination of virtual teams and on-site teams. In these situations, the leader is the key link for her or his own virtual team. It is the leader's responsibility to step in and interact with other managers to ensure that multiple priorities do not prevent the team's work from moving forward. One multinational organization, for example, requires leaders, acting on behalf of their own virtual teams, to negotiate time and work issues with the home office or other virtual team leaders. By communicating with peers to discuss common issues, virtual team leaders can ensure that their own team members are able to devote an appropriate amount of time to each project.

Put It in PARK (Wrap Up)

Many times virtual teams disband when a project is completed. At this point it is helpful for the leader, the team members, and the organization to formally debrief the team's work experience. Documenting team results, accomplishments, and lessons learned is a public way to acknowledge individual efforts and record best practices for future assignments.

As a final step in the Refresh stage (see Figure 1-3), it is useful to ask team members what they would change if given a chance to redo the experience. This has a twofold purpose: It can help people formulate ideas

Figure 1-3. Refresh.

STAGE 3: Refresh	Activities
• Tune Up	• Tune up (set new goals, onboard new members, reestablish norms, realign, replace parts).
• Refuel	• Refuel (reenergize, respond, regroup, redo; determine improvement areas; assign training and provide new role assignments).
• Put It in PARK	• Put it in PARK/wrap up (prepare final reports, review accomplishments, arrange closing celebrations and evaluations, restart).

for a future virtual team experience, and their insights can help you improve your own skills as a virtual team leader.

If time permits, you can privately communicate with team members and thereby individualize your comments as appropriate. However, this process is not a substitute for a more formal close. This “celebration” ideally includes the opportunity to bid good-bye to coworkers whose paths may not intersect again, as well as a chance to evaluate the team as more than the sum of its parts.

One idea for the wrap-up is to give awards. Serious awards are great, but humorous ones are fine, too, as the objective is to bring the entire team together and enjoy each other’s company (physical or virtual) for the last time. Members can end their shared experience on a positive note, and the door is left open for communication if members work together in the future.

In my consulting experience, this three-stage approach has been shown to be practical, doable, and easy to implement. The rest of this book is organized to follow the three stages of VT development, with the end result being a true journey. Chapter 2 further addresses the details of planning and then Setup of your virtual team. Chapters 3 through 6 detail the Follow-Through steps critical to team implementation and performance. Chapter 8 is dedicated to Refresh stage activities and what you need to do to realign your team for the future. In between, in Chapter 7, I introduce ideas for handling cross-cultural

communications, which is an extra layer of complexity to virtual team development.

What's Next for Your Virtual Team?

Organizations set up teams like yours to create, develop, and deliver complex results within various constraints. Virtual team arrangements are already becoming more popular, and in time they will become the norm and reshape the world of business. As members of one or more virtual groups, we will form, build, and rebuild webs of relationships in ways we cannot yet imagine.

Virtual teams are the wave of the future, especially as technology advances and enables closer human connections. The next few decades may mirror science fiction movies. Perhaps team members may one day communicate through holograms or, who knows, the transporters familiar to *Star Trek* fans may become a reality.

Today, however, you may be like many virtual managers, with a team that has been working together for a long period of time and largely functions on automatic pilot. Some of these managers may hope that results will improve on their own (as if producing the same actions produces miracles), while others may struggle to incorporate the increasing demands of our precarious world into already-strained professional relationships.

Add to this scenario the reality that your team may continue to expand into new regions, adding additional challenges to developing teamwork. Almost every organization with a virtual presence needs to design newer team structures to link knowledge pools across broad geographic and organizational boundaries. And, as the leader, your responsibility is to help your team make the necessary transition to the unique demands of virtual teams.

True virtual teamwork requires a deeper level of clarification, communication, commitment, and consequences management than is typically present in teams sharing a location. Teamwork must also become more than a notion; teamwork must require the *team* to work.

My hope is that the ideas presented in this book will be useful to virtual teams whose members are distributed across various time

zones. But the ideas will not work if they simply stay in this book. You and your team must bring them to life and, in doing so, create productive, energizing, and fulfilling workdays.

The power of your leadership lies in your hands, as you determine how you will put into practice those ideas, strategies, and suggestions that can meet the needs of your organization. With that in mind, get ready to move away from the sidelines of team management and into the game of global virtual leadership—where the power is in creating *teamwork*.