



Managing Virtual Teams for Real Results

presented to



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by

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Building State-of-the-Art Teamwork
In Problem-Solving Organizations

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Core Message

- More confusion and miscommunication
- More difficult to monitor
- Cultural differences enhance confusion
- Greater likelihood of policy mismatch
- Must do things differently from conventional teams
- Must spend more money doing it
- We do it anyway because:
 - The work is inherently dispersed; or
 - We save by not building a face-to-face organization

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A note on format

- Underlined items are live links to:
 - Other slides
 - Articles on my Web site
 - Articles elsewhere on the Web
- To get a copy with working links, download:
<http://tinyurl.com/27s4hmw>
- To get a copy of the handout, download:
<http://tinyurl.com/2fzpsyn>
- To get both as a zip archive, download:
<http://tinyurl.com/2deyjm9>

Please let me know as we go along
if you want to ask a question

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The menu

Key:

- ➔ Already in the plan
- You choose

- ➔ What's a virtual team?
- ➔ What's a dispersed team?
- ➔ Best practices for dispersed teams
- Tips:
 - Geographic dispersion
 - Cultural dispersion
 - Dates
 - Language dispersion
 - Email
 - Voicemail
 - Face-to-face meetings
 - Telemeetings

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What's a virtual team?

- Common definition:
A virtual team is a team that's dispersed either:
 - Geographically (not physically co-located), or
 - Organizationally (spans corporate boundaries), or
 - Both
- But the problems of virtual teams appear in other configurations, too
- That's why I prefer to think about *dispersed* teams

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Geographically dispersed teams vs. global teams

- Your team is geographically dispersed if, to have a F2F meeting:
 - You have to use a vehicle of any kind; or
 - You have to walk more than two minutes; or
 - You have to go outside from one building to another
 - Or: You never meet face-to-face
- A global team is a dispersed team with:
 - At least one offshore element; or
 - At least two sets of laws; or
 - At least two sets of national holidays; or
 - At least two social cultures

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Dimensions of dispersion

Dimensions

- Geographic
- Temporal
- Organizational
- Demographic
- Linguistic
- Socio-cultural
- Professional
- Monetary
- Fiscal

Consequences

- Harder to detect malfeasance
- Wider variety of performance standards
- More communication problems
- Longer “closed loop” communications
- More confusion
- Greater cultural variation
- Greater distance separations
- Team members still in home cultures
- More work style mismatches
- More temporal mismatches
- More calendar conflicts
- More linguistic variety

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Best practices for dispersed teams

- Regard early attempts as pilots
- Train specifically for dispersed environments
- Recognize the Economic Paradox of dispersion
- Appreciate the accounting system illusion
- Seek people with knack for finding a “third way”
- Seek problem-solving ambassadors
- Use compensation to collapse layers of subs
- Eliminate *pro forma* project managers
- Allocate extra budget and schedule (30%)
- Reduce split assignments to limit contention risk

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Develop trouble-detection metrics

- Cost of confusion-driven rework
- Cost of undetected malfeasance (currency-days)
- Tweaking CCs
- Voluntary turnover
- Hot potato tiffs
- Triangulation incidents
- Incidence of confusions (“Oh, I thought X”)
- Incidence of I’ll-have-to-get-back-to-you
- Confusion Feedback Ratio
- Sum of Liabilities on the Budgetary Critical Path

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Trust-building tactics: examples

- Make people aware of cultural differences
 - Offer training in cross-cultural trust-building
 - Invest in building relationships
- Clearly define roles and responsibilities
- Conduct kickoffs face-to-face
- Have face-to-face meetings periodically
- Have a Team Family Album
- Deal with serious conflict face-to-face
- Rotate meeting sites
- Rotate the site for the telemeeting facilitator

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Elements of a communications plan

- Specify electronic infrastructure
- Training program for deployed technologies
- Standard protocols for specific media
- Specify localized software applications
- Define classes of communications
 - What goes to whom
 - Media: how messages get to the people who need them
- Roles, responsibilities, risks, budget, schedule

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Consider adopting novel tactics

- Training for non-verbal communication
 - Structure of non-verbal communication
 - Cultural differences
- Consolidate less-than-urgent communications
- Consider dropping landlines for highly mobile people
- Use video wormholes (great for celebrations)
- Prepare for tragedy, both personal and work-related



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Be alert to organizational issues

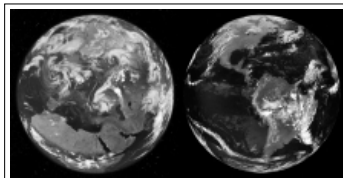
- Anticipate organizational incompatibilities
 - Data access
 - Legal questions
 - Performance management/input
- Investigate recognition practices
- Beware fiscal timing mismatches
- Verify software applications compatibility
- Allocate the organizational “Morale Fund” to teams
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Tips for geographic dispersion

- Make meetings as full-duplex as possible
- Define Team Standard Time
 - Use a time zone only if everyone already has same daylight/standard protocol
 - Otherwise: use Zulu
- Pay special attention to modules that span sites
- Align module interfaces with site boundaries
- Remodularize according to geography
- Make troubled modules single-site
- Foster cross-site relationships
- Limit turnover risk especially at interfaces
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Tips for cultural dispersion

- Humor doesn't export (or import) well
- Train everyone in culture-specific differences
- Restrict celebrations to team-relevant events
- Vet metaphors and allusions
- Make your infrastructure compatible
- Be aware of rank – follow local custom
- Beware estimation risk
 - Historical effort data is culture-specific
 - Transplants work at home-culture rates
- Manage non-immersion risk of videoconferences
-

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Dealing with dates

- Define expectations about complying with dates and deadlines
- Have an inform-as-soon-as-you-know norm
- Define consequences of norm violation
- Research legal and religious holidays
 - Religious: When-Is.com
 - 2010 Bank Holidays in India
 - Evaluate world holiday Web sites by checking your own country's holidays
- There are about 40 calendars in use worldwide
 - CalendarZone.com
 - Wikipedia article: Common Era
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Tips for language dispersion

- Designate a Team Language
- Designate a Meeting Language (per meeting)
- Use professional interpreters and translators
 - Use interpreters/translators with domain expertise
 - Avoid domain experts with language expertise
- Verify document translations
 - Critical translations: loop back to verify invariance
 - Use sampling to verify less-critical translations
- Use code names instead of acronyms, abbreviations and initialisms
- Choose component, process, site and concept names with care
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Tips for email

- Define acceptable message response times
- Use meta-responses
- Define criteria for switching to more direct media
- Avoid TUI
- Have a take-it-offline norm for scuffles
- Ban tweaking CCs and long, complex debates
- Ensure (in advance) passage through bulk email filters
- Always confirm – don't rely on silence
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Tips for voicemail

- Speak slowly
- Don't make up your message on the fly
- Keep it simple
- Say goodbye only once
- Say your phone number twice
- Don't give the time or date
- Press the button to hang up – don't replace the handset
- Learn your system commands (local and remote)
- Consider calling voicemail directly
- Define acceptable message response times
- Use meta-responses
- Always confirm – don't rely on silence

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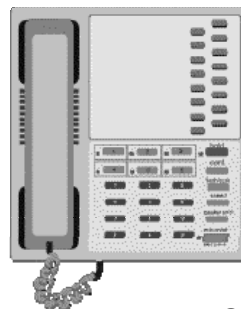
Tips for face-to-face meetings

- They're expensive, but not having them is worse
- Conduct retrospectives:
 - While the work is still underway
 - Immediately after you resolve an emergency
 - Invite "ambassadors"
- Allow time and space for socializing
- Create a program, not just an agenda
- Choose a venue that supports the work
- For long flights, fly **business** class
- Include a celebration
- Schedule celebrations near the middle of the stay
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Tips for telemeetings (1)

- Favor symmetric meetings
- In asymmetric meetings, elicit contributions from tele-attendees
- Limit attendance: 8-12 speaking roles, max
- Limit objectives and agenda
- Limit time: 90-minute sessions
- Use trailing-edge technology when possible
- Shift routine chores to pre-meeting asynchronous media
- Send invitations early



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Tips for telemeetings (2)

- Circulate a program, not just an agenda
- Tailor exhibits to the needs of telemeetings
 - Include on exhibits a URL for downloading
 - Line number for complex documents
 - Highlight key portions of exhibits
- Designate a scribe and a timekeeper
- Hold some time in reserve
- Arrive early and welcome arriving attendees
- Enforce the timeline – be ruthless
- Skip the round-the-table introductions
- Contribution protocol: <name><content><over>
- Three-exchange limit for dialogs
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 - Communications
 - Meetings
 - Project management
 - Change
 - Workplace politics
 - Conflict
- <http://www.ChacoCanyon.com/pointlookout>

Or: Write “subscribe” on your business card

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Resources

- This and other related topics:
<http://www.ChacoCanyon.com/>
- The handout:
<http://www.ChacoCanyon.com/pdfs/pmi-ctt-handout-05-19.pdf>
- Active links:
<http://www.ChacoCanyon.com/pdfs/pmi-ctt-slides-05-19.pdf>
- Tips booklet:
<http://www.ChacoCanyon.com/products/tips-global.shtml>

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--

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- OK to use my company name

What did you like best about the presentation?

What ideas will you use first?

Optional:

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--

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