

Seven Virtual Team Management Best Practices for Project Managers

“They don’t get it!” is sighed in frustration universally by Project Managers. They are the virtual team that must deliver the project. What they don’t get is what is expected to be delivered or when it was due or the costs. That lack of urgency seems to be missing. The question to ask is, “how do you, the project manager, get them to get it?” Unfortunately the universal project manager answer applies here too, “it depends.” It depends on the ability of the project manager to learn and use best practices for virtual teams. It depends on the project manager’s willingness to try them, to reflect on them, and to adapt these practices to their project team.

Getting the virtual team to get it and become high performers requires learning and practicing great virtual team management skills. Virtual best project practices are different; they are an extension of best project practice. They depend on the project manager’s ability to communicate how the team members will interact with each other and their environments.

Two Tools for *HOW*: Communication Plan and Team Operating Agreements

It is different *how* a project manager works with a virtual team. The best of the best practices are different. Yet, the end goal the delivery of the project is the same. In a virtual team the best practices focus on *how* to get things done and *how* to interact with the team. Being virtual removes the physical proximity which in turn takes away everyday unconscious interactions, behaviors, and habits. Studies show that understanding is 55% to four times more when face to face; therefore the potential for misunderstanding is huge for each virtual interaction. How team members interact on a face to face team is rarely ever considered, it’s a given and it’s assumed they will figure it out. There are two key best practice tools for a virtual project manager that improve the understanding of the interactions and help to set clear expectations, they are a communication plan and team operating agreements. The tools detail how the team will interact. The team operating agreements are like ground rules for meetings, yet extend beyond a meeting to duration of the project. The team operating agreements are sometimes stand alone and sometimes developed as an extension of the communication plan. Communication as defined is the interaction between a sender and receiver. The communication plan is well documented in Chapter 10 of the project management book of knowledge. It outlines who will say what to whom, how frequently, the intention of the communication, where it comes from, nuances and using what communication media. The communication plan is similar to the rules of a sports game. It contains none of the play by play specifics or the outcome of the game (the project). If done well the communication plan can be used for many projects and be adapted as needed.

The team operating agreements are more of a living document than the communication plan. They emphasize agreements on how to work together daily; to resolve issues, report status, assign work, showing up for meetings, timeliness, how to deal with holidays, conflict, and what to do if deadlines or meeting are missed, and more. The operating agreements allow virtual team members to take off the virtual blindfold and interact with each other more effectively and not just when an issue arises or in formal team meetings. One way to keep the operating agreements as a living document and to make it real is at every team meeting to start with a review and ask for any adjustments to the operating

agreements. Question that can be asked are: Which agreement is working well and why? Which one is not working? Do we need some new agreements, or to adjust some existing ones? When used properly the communication plan and team operating agreements will increase understanding and improve *how* the team will interact. To work they must become living documents that are understood, realistic, used, updated, and shared by all team members.

Virtual Team Principle: Slow Down to Speed Up

Slowing down to speed up is a best practice principle for virtual teams. It also is a good principle for co-located teams, yet most co-located teams figure out how they interact while they are working through project issues. For virtual teams slowing down to speed up becomes a best practice. Slowing down in practical terms means to upfront take the time to set up the expectations, focus and create processes on how the team will interact, put in place the appropriate tools. Spend time learning how things work at each site that will help and harm the ability for the team to work seamlessly together. Does each team member have access to all the same technology and tools as each other? Are their site specific goals and managers that will consume and take the priority away from the project? What working hours and norms and culture opportunities and challenges will the team have to deal with? Document the findings and use the communication plan and operating agreements to address *how* these can be worked with for the team. Most project managers already understanding the importance of slowing down to speed when it comes to change management processes. It's clear that a process for project changes should be in place before any changes occur, so the focus is on the change itself not how the change is made. With a virtual team, the slowing down is focused more on any and all interactions and handling site specifics. Slowing down and setting in place clear expectations and how the team will interact daily allows for a smoother and faster project execution.

Technology is Air for Virtual Teams

Technology is the equivalent of air for virtual teams. For co-located teams air is the communication medium. Virtual team's medium for communication is technology. The tools used for communications are essential and must be pure and clean and not cause coughing and sickness. Technology that hides, clips, drops words has caused projects to die or wither. The order of consideration for selecting a tool to interacting with team members, should mimic air as much as possible, hence a high quality real time video that captures the entire space and allows for clear views and sounds of all media is best. The worst would be a text only, not archive able and one way short non-validate receipt messages. This priority for picking a team communication tool:

Face to Face > High Quality Video and Interactive Multi Media > Video >High Quality Voice and Interactive Multi Media > Voice> Interactive Multi Media real time > One way communication with archiving (email) >One way text with no archiving

The closer the tool that is selected for real time team interactions that mimic air the less potential for misunderstandings. Other criteria for selecting team communication tools are: archiving, record keeping, budget, ease of use, and availability to all sites. The importance of the communication tools for the team is like selecting the air the team will work in. The communication plan is equivalent to the

rules of a game, describing how it will be played. That makes the communication tools used the playing fields for the game, the interactions. There are typically site specific rules to describe what part of the playing field will be used, what is fair and foul and when it will be used. Any specific and unique features of the tools that will be used that also needs to included. The general rules of the game and the specific playing rules for the tools need to be decided up front communicated and documented early on.

Virtual Team Principle: Create a Virtual Personality and Presence

Out of sight and out of mind is a natural human behavior that works against the virtual project manager. The project managers challenge is to be visible and present, yet not overly so. Creating a virtual personality and presence is a best practice for virtual project managers. Finding the right balance of how frequently to communicate is one aspect to a creating a virtual personality. For example if a project manager overly communicates it may cause important information to get lost in the deluge and convey a sense of micromanaging, a lack of trust, or confidence. If the project manager becomes invisible and not heard from for weeks it's easier for a virtual team member to interpret this as a lack of concern and wonder how important the project really is. This may cause team members to put their priorities elsewhere. Every virtual interaction is a clue for the team members about the personality of the project manager. These virtual clues create a personality that may or may not be true that team members use to interpret how to respond to the project manager. Is the project manager strict, disciplined, open, honest, political, friendly, or savvy? Do virtual actions match the virtual words? Creating a virtual personality requires upfront planning and a keen sense of knowing thyself. Knowing thyself is a best practice for virtual project managers and it is essential in creating a virtual personality. Knowing how their voice tone and sound, word choice, clarity, ability to articulate in spoken and written communication are interpreted first steps in creating a virtual personality. How strong are their written and verbal communication, delegation skills, influencing, and ability to empower skills? Are they willing to ask for and get feedback? Can they create a voice that inspires and creates a sense of urgency? Are they getting good site information, by asking good questions? If they are directive and loud does the team fears asking questions? Selecting and knowing what virtual personality is desired and how to achieve it is the next step in creating a virtual project manager personality. It's done in a conscious and proactive manor and sometimes it's personally challenging. Taking and getting constructive feedback and committing a virtual personality and presence are best practices for virtual project management.

Virtual Team Principle: Increase Interactions, Play a Gracious Host

Working virtually means more time spent in interactions with team members. The amount of time spent planning for and communicating is at least double what it is for a co-located team. In addition to the formal meetings the virtual project manager must find ways to mimic the informal and unplanned interactions that a co-located team has, like catching someone in the hall and chatting. Co-located teams inadvertently use these unplanned interactions as predecessors for solving problems and getting work done. While it sound circular, it is possible to virtually create informal and unplanned ways that the team can interact on a regularly basis. The project manager is like a host at the party. The host has some relationship with each guest. The project manager wants to create a safe and interesting virtual

place that team members want to show up at and share. A good host is interested in their guests, is curious, polite and concerned for their guests comfort. A good host also knows when the guest wants to leave and get work done. The great host can ask good questions, is friendly, approachable and fun. Here are five examples of how some virtual project managers have created informal gathering spots are:

1. **Daily five minute phone calls or video calls with each team member.** Thirty minutes a day is all it takes to have a five minute phone call with six team members. For larger teams either every other day or connecting to key contacts is suggested.
2. **Create a virtual water cooler.** Keep an online open communication like chat room open all the time, for team members to just hang out. Declare, “Break times”, “lunch”, “game time”, “check- in times”.
3. **Hold virtual office hours.** Be online, have open phone lines and available at regular times daily or weekly.
4. **Create project challenges and competitions.** The more relevant to the project the better, make them educational, interesting and fun.
5. **Create proactive professional relationship with each team member.** This isn’t saying to become best friends or even having to like all the team members. It’s about understanding enough of who they are, what their career is about, and how they will be able to help with whatever project challenges may arise now and in the future.

Virtual Team Meetings Best Practices

Virtual team meetings are a given and can’t be avoided for the virtual team. In the USA alone, it is estimated that over 3-37 billion a year is lost in productivity because of poor meetings. There are many tips and tools for running effective meetings which mostly all apply virtually. With good basic meeting management assumed, there are additional practices that apply and become important when running virtual team meetings. The virtual team meeting principle is to create, increase, and force engagement and interactions from all team members frequently. Here are some techniques that will help in achieving this principle:

- No monologues – no more than three sentences before forcing an interaction
- Ask question frequently
- Verify and validate that everyone heard you or another team member who is speaking
- Call on people by names, and get everyone to answer
- Use a virtual touch sheet to keep track of who spoke on what topic and when
- Long explanations, should be written down and sent out ahead of time
- Speak slower, use shorter sentences, be concise, and use less slang and cultural references
- Make the implicit explicit; describe and state what seems obvious; examples are: we will be closed on Monday for a holiday; a snow storm may cause power outages this week

Seven Virtual Team Best Practices for Project Managers

1. Focus on tools and processes that make clear HOW the team will work. Develop and use a communication plan and team operation agreements are essential.
2. Slow down to speed up. Take the time upfront to understand all the environments and cultures you are working in.
3. Create a virtual personality and presence.
4. Project Manager know thy self, strengthens and weakness. In particular: verbal and written communication skills, ability to influence, resolve conflict, receive and give feedback, to delegate and empower the team members.
5. Plan on spending at least twice the amount of time planning for and communicating.
6. Be a great host, create places where the team looks forward to and can meeting for unplanned interactions.
7. Run effective virtual meetings. The key is to use good basic meeting management techniques and to create, foster, and force engagement and interactions frequently.