

## **Virtual Team Management Best Practices, by: Star Dargin**

“They don’t get it!” is a cry of frustration too often heard from managers of ineffective virtual teams. What they *don’t get* is what is expected to be delivered, or when it was due, or the ballooning costs. That lack of urgency and drive to get things done—something seems to be missing. Sometimes virtual workers themselves are missing!

How do you, the manager, get them to “get it?” Unfortunately, the answer is, “it depends.” It depends on the ability of the you, the manager to learn and use best practices for virtual teams. It depends on your willingness to try new techniques for effective communication across distance and through varying media. It depends on your ability to reflect and to adapt these practices to the situation, individuals and team.

Getting the virtual team to “get it” and become a truly high performing team requires learning and practicing virtual team management skills. Virtual best practices are different than those required for face to face meetings and in-person collaboration.

Virtual team meetings can’t be avoided. While virtual teams can allow for better work-life balance for workers, and offer environmental benefits, in the United States alone, researchers estimate that between three and thirty-four billion dollars a year are lost in productivity because of poor meetings. With good basic meeting management and using virtual team best practices, productive teams can deliver successfully. It starts with basic good communication skills.

### **How: Communication Plan and Team Operating Agreements**

The best practices are different, but the end goal to deliver results is the same. In a virtual team the focus is on *how* to interact with the team, the process of communication itself. Being virtual removes the physical proximity which in turn takes away everyday unconscious interactions, behaviors, and habits. Studies show that understanding can be improved by 55% or more when face to face. Many teams use video meeting tools to allow their communication to be more effective during meetings.

How team members interact on a collocated team is often considered a given, and it’s assumed that competent team members will be able to communicate affectively between themselves. While they can be used for face-to-face teams, two best practices that are even more critical for virtual teams to improve understanding are: a communication plan and team operating agreements.

These tools detail how the team will interact. The team operating agreements explicitly contain norms that establish the acceptable behaviors for working virtually. One example might be to agree in advance to mute when not talking.

The communication plan establishes the process of communication. It outlines who will say what to whom, how frequently, the intention of the communication, where it comes from, and which media are to be used under which circumstances. A good communication plan can be reused for many teams and adapted as needed.

Communication planning templates exist in abundance and are part of the Project Management Institute's *Project Management Book of Knowledge*. The team operating agreements can be stand alone, or developed as an extension of the communication plan.

A good team operating agreement is a living document. It includes statements on how the team has agreed to work together every day; it includes how the team will resolve conflicts, how individuals will report the status of their work, how work will be assigned. It may also include timelines, how the team will deal with upcoming holidays or vacations, how and where team members will show up for meetings.

Operating agreements allow virtual team members to take off the virtual blindfolded and interact with the each other more effectively. They create channels for communicating, not just when an issue arises or in formal team meetings, but during the regular working process. One way to keep the operating agreements as a living document and to *make it real* is to review the agreements and ask for any adjustments at the start of formal meetings. Questions that can be asked are:

- What agreements are working well and why?
- Which agreements are not working?
- Do we need some new agreements, or to adjust some existing ones?

The communication plan and team operating agreements increase understanding and improve *how* the team interacts. In-person teams create working cultures organically as the members spend time together, which create norms and shared understandings about how to solve challenges. For virtual teams, communication plans and team operating agreements create a shortcut to a virtual culture that supports results and takes the emotion and guesswork out of solving disagreements between team members. To work they must become living documents that are understood, realistic, used, updated, and shared by all team members.

### **Slow Down to Speed Up**

Slowing down to speed up is a best practice for any team, but even more so for virtual teams. In practical terms this means to take the time up front to set expectations. Create processes for how the team will interact, put in place the appropriate technology and 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 the same technology and tools?
- What are the working hours, norms and holidays of this site?
- Are team members separated by time zones, cultural barriers or differences?
- What cultural 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 work for the team. Slow down to focus on handling site specifics. Slowing down builds trust. Trusting teams allows for faster results, even in time must be invested before work can begin.

## **Technology is Air for Virtual Teams**

Co-located team's communication medium is air! Technology is air for virtual teams. The tools used for communications are essential. They must be pure and clean, and not cause coughing and sickness. Technology that is difficult to use, hides, clips, or drops words has caused teams to die.

In selecting a tool for team members, it should mimic air as much as possible. A high-quality real-time video that captures the entire space and allows for clear views and sounds is a must for success. Text, or even voice alone, cannot fully capture the wide range of human communication.

In addition, the ability to archive and refer back to communications is also critical—and can be a challenge with video and voice communication. Consider tools that allow for transcription of meetings—but using a blend of media can be an even easier, more cost effective solve. In your communication plan, you might create a norm that meetings begin with an agenda shared via email—and notes are shared after the meeting on each agenda item.

Finally, it is important to ensure that technology will be uniformly available in all sites. If a communication tool only works with one type of computer, or is blacked out in certain countries, this could be a deal-breaker—unless you can ensure your team won't be affected.

## **Create a Virtual Personality and Presence**

“Out of sight and out of mind” is a natural human behavior that works against the virtual manager. The challenge is to be visible and present, yet not too present. Creating an intentional and authentic virtual personality and presence is a best practice.

Finding the right balance of how frequently to communicate is one aspect to a creating a virtual personality. If a manager overly communicates it may cause important information to get lost in the deluge and convey a sense of micromanaging or a lack of trust, or confidence. On the other hand, if a manager becomes invisible and not heard from for weeks, it's easier for a virtual team member to interpret this as a lack of interest in the outcome of a project. 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 manager. These virtual clues create a personality that may or may not be true to the personality a manager might display in a physical office. Team members interpret these clues to decide how to respond to management. Is the 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 how your voice tone and sound, word choice, clarity, ability to articulate in spoken and written communication are interpreted are the first steps in creating a virtual personality. How strong are your written and verbal communication skills? What do you need to improve? Are you willing to ask for and get feedback? Can you create a voice that inspires? Can you create a sense of urgency while maintaining

expectations of quality? Can you ask good questions to get specific and helpful answers? Have you created a safe or a fearful virtual space?

Selecting and knowing what virtual personality is desired and how to achieve it is the next step in creating a virtual manager personality. It's done in a conscious and proactive manner. It can be subtle and challenging. Taking and getting constructive feedback and committing to a virtual personality and presence is a best practice.

### **Increase Interactions, Play a Gracious Host**

Working virtually means more time spent in interactions with team members. The amount of time spent planning for communication and in the act of communicating itself is at least double what it is for a co-located team. In addition to the formal meetings, the virtual 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. It is possible to virtually create informal and unplanned ways that the team can interact on a regularly basis.

The manager is like a host at the party. The host has some relationship with each guest. The 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 managers have created informal gathering spots:

1. **Daily five-minute phone 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 or chat rooms available at regular times daily or weekly.
4. **Create challenges and competitions.** The more relevant to the results the better, make them educational, interesting and fun.
5. **Create proactive, positive, and professional relationship with each team member.** It's about understanding enough of who they are, what their career is about, and how they will be able to help with whatever challenges may arise now and in the future.

### **Communicate in a way the Supports Interaction**

To create interaction, communicate in a way that supports it. As a facilitator of a virtual meeting, here are some tips that will help in achieving interaction:

- 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 snowstorm may cause power outages this week

### **Summary of Virtual Team Best Practices**

Focus on HOW the team interacts, the tools and processes. Develop and use a communication plan and team operation agreements.

1. Slow down to speed up. Take the time up front to understand all the environments and cultures you are working in.
2. Proactively create an authentic virtual personality and presence.
3. Know your strengths and weaknesses. In particular: verbal and written communication skills, ability to influence, resolve conflict, receive and give feedback, to delegate and empower the team members.
4. Plan on spending at least twice the amount of time planning communications and engaging in communication.
5. Be a great host, create places where the team looks forward to and can meeting for unplanned interactions.
6. Use good basic meeting management techniques and to create, foster, and force engagement and interactions frequently.

These best practices were derived from research, reading, practice and observing people that are naturally and intuitively excellent at working virtually. Working virtually may not be every manager's first choice—but keeping a firm grasp on the best practices of managing virtual teams might be critical to helping your company weather a storm or remain flexible in a changing work environment.

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