

DEBORAH L. DUARTE &
NANCY TENNANT SNYDER

with cd-rom

mastering virtual teams



third edition

strategies, tools,
and techniques that succeed

MASTERING VIRTUAL TEAMS

MASTERING VIRTUAL TEAMS

Strategies, Tools, and
Techniques That Succeed

THIRD EDITION

Deborah L. Duarte
Nancy Tennant Snyder

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To Ralphine and Donald:
We remember the laughter, love, and song of you.

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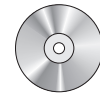
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PREFACE

When we wrote the first edition of *Mastering Virtual Teams* in 1999, we had no idea that our timing for the book would coincide with the start of an era of geopolitical and economic factors that would “flatten” the world. It was only in reading Thomas Friedman’s book *The World Is Flat* (Farrar, Straus & Giroux, 2005) that we realized the scope of the convergence of megatrends that shaped a workplace where virtual collaboration had become the norm, not the exception. Consequently, *Mastering Virtual Teams* has had exposure in numerous countries and companies and among countless academics, students, and practitioners who operate in the virtual world that Friedman describes. His triple convergence of workers, workplace, and work processes necessitated multiple forms of communication and collaboration and the escalation of tools and methods for virtual teams. In the handful of years since our book was first published, we have moved from a few of us working on virtual teams once or twice a year to most of us spending some part of every day in a virtual experience. Surely, the next generation of workers will not use the term *virtual* and will be amused by the “olden days” when work was accomplished each and every day between people face-to-face and when the newest miracle of communication in the workplace was the fax machine.

With that said, communication and collaboration are still the two most important factors in team success. The virtual environment fundamentally continues to transform the ways in which teams operate. Technology introduces a critical variable that radically changes the choices for, and the effectiveness of, communication and

collaboration. For example, many of us have struggled through at least one boring and nonproductive videoconference in which the images lagged behind the audio to the point of distraction, and many of us have sent an e-mail or voice mail message in an emotional moment and had it misinterpreted by the recipient.

Crossing geographical boundaries also affects the ways in which virtual teams communicate and collaborate. The preference in some cultures to consider the individual first and then the team may make someone who has grown up in a more collective or group-oriented society feel uncomfortable with the independence of teammates. The practice of “saving face” in some cultures can make a slightly negative e-mail message about a team member’s work a terribly embarrassing experience. Significant differences in time zones often make virtual team meetings inconvenient for some team members.

Although we have the technological capability to work across time and distance and we dream of teams that leverage technology into competitive advantage, the fact is that we still need new competencies and practices to do these things. Leading and working in virtual teams require much more than computers and technology. Success or failure depends on the attainment of competence in and implementation of practices that facilitate working effectively virtually. It is no longer enough to just understand that technology or national culture affects teamwork; successful team leaders and members need tools, techniques, and decision-making strategies that work in a virtual environment.

Who Will Benefit from This Book

This book was created to provide the how-to for people who work in or lead virtual teams. It is targeted at people from large and small organizations as well as at individuals who work independently and need straightforward and down-to-earth advice to make their virtual teams successful. Readers from all cultures and all types of organizations can benefit from this book.

This book offers theoretical and conceptual information about working in and leading virtual teams as the foundation for more practical strategies. It contains many practical tools, including checklists, tables, and worksheets. It also answers some basic questions and offers strategies and techniques that are especially important for people who are new to virtual teams, for example:

- What types of virtual teams are there, and how does the type of team I work on affect how I work?
- How does a virtual team differ from a traditional team?
- How do I start a virtual team; what are the steps and important considerations?

- What are the technological options open to me, and how do I select the most appropriate ones?
- How do I select a technology that matches my team’s task, organizational culture, and team member experience?
- How do the various aspects of national, organizational, and functional cultures affect virtual team performance, and what can I do about them?
- How do I manage the interaction of culture with selecting and using technology, building trust, and team dynamics?
- What are the competencies I need to develop in order to work in or lead a virtual team?
- What is my role as a virtual team leader?
- What is my role as a virtual team member?
- How do I build and maintain trust among team members when we can’t see one another?

This book also provides more advanced information in the areas of team dynamics, virtual meeting facilitation, and working adaptively. It answers questions such as these:

- How do I plan for and facilitate a virtual team meeting?
- How do I leverage technology to make virtual meetings more effective than face-to-face ones?
- How do the dynamics of virtual teams differ from those of traditional teams?
- What are the other team variables, and how can I influence them?
- How can I design team interventions?
- What styles and leadership practices work in an adaptive and virtual environment?

Both of us work in or consult to bottom-line and results-oriented organizations in the public and private sectors. This affects the ways in which we view leadership and the roles of leaders and team members. Although it is likely that our biases will emerge at times and that our North American cultural perspective will show, we have tried to maintain broad and balanced cultural and organizational perspectives.

How to Use This Book

Mastering Virtual Teams has three parts. In Part One, “Understanding Virtual Teams,” we define and explore the complexities of virtual teams. We present the important factors that make a virtual team different from a traditional one. In Chapter One, we describe different types of virtual teams and present a set of critical success factors.

We offer team leaders and members recommendations for action to ensure that these success factors are in place. In Chapter Two, we sort through the myriad of information about technology, integrate it, and offer practical guidance about the different technological options available to virtual teams. We provide guidance about what works best in different situations and present criteria to evaluate the usefulness of each technology for a particular team. In Chapter Three, we examine the ways in which national, organizational, and functional cultures affect the performance of virtual teams. We also investigate how culture can be used to leverage performance and, on the darker side, how it can be used as an excuse for nonperformance. Part One provides a foundation for understanding the pragmatic advice in the remainder of the book.

In Part Two, “Creating Virtual Teams,” we present the nuts and bolts and the intricacies of starting a virtual team. This part provides straightforward suggestions, checklists, and worksheets about startup strategies that make virtual teams work. In Chapter Four, we introduce a set of myths and realities about leading virtual teams. We translate these into seven areas of competence that are critical for virtual team leaders. Each type of competence is accompanied by recommendations for developmental activities. A competence assessment is also offered as an individual development planning tool. In Chapter Five, we present a step-by-step process for starting a virtual team. This includes directions, checklists, agendas, worksheets, and techniques for obtaining sponsors, chartering the team, conducting team orientation meetings, team building with different cultural groups, developing team norms, using technology, and planning communication. In Chapter Six, we present two critical roles for virtual team members: autonomy and collaboration. We build a set of team member skills around these two roles and offer competence assessment tools and recommendations for personal development. In Chapter Seven, we cover the critical element of building trust in a virtual team environment. We also describe how trust can be affected by national culture and by the use of technology. This chapter presents a variety of tools, checklists, and exercises that are useful in building and maintaining trust.

In Part Three, “Mastering Virtual Teams,” we offer more advanced information for virtual team leaders and members. In Chapter Eight, we give recommendations for facilitating virtual team meetings. This includes methods for planning and running virtual meetings and for using technology so that the virtual meeting has the potential to surpass a face-to-face meeting. In Chapter Nine, we present a model of team development and team dynamics for virtual teams. We recommend strategies for tracking and diagnosing a virtual team’s effectiveness and provide interventions for dealing with typical problems of virtual teams. In Chapter Ten, we present a model for working and leading in adaptive and unpredictable situations. We also present eight practices that are factors in the success of virtual teams.

New to the Third Edition

The third edition has a number of new components. Given the reality of Moore's law, we updated the technology section to include instant messaging and personal computing devices. We have added more worksheets and checklists and updated some of the existing ones based on our experience. We have also deleted the specific references to particular companies and their practices and now focus more on ideas, concepts, tools, and methods. This is a reflection of that fact that many companies that were lauded in the 1990s are no longer on top or no longer exist. It is also a reflection of feedback that readers found the checklists and tools much more useful than the examples. Finally, we added a new section in most of the chapters, "Near Virtual Disaster." These stories of lessons learned are based on firsthand knowledge of problems that occur in a virtual world that did not occur in the real world. The rapid maturing of virtual teams has created a new and different set of problems and opportunities for digitized disasters.

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February 2006

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MASTERING VIRTUAL TEAMS



PART ONE

UNDERSTANDING VIRTUAL TEAMS



CHAPTER ONE

CRITICAL SUCCESS FACTORS FOR VIRTUAL TEAMS

In today's business environment, organizations must adapt quickly or die. Gaining competitive advantage in a global environment means continually reshaping the organization to maximize strengths, address threats, and increase speed.¹ The use of virtual teams has become a common way of doing this.² The formation of virtual teams allows organizations to draw talent quickly from different functions, locations, and organizations. The goal is to leverage intellectual capital and apply it as quickly as possible. The methods that organizations use to manage this process can mean the difference between success and failure.

Consider the example of a team in a global consumer products firm. This product development team, with members from around the world, had just completed the development of a new product. When the team unveiled the product to the senior staff of the organization, it included a description of the way the team worked. The presentation showed an icon of an airplane, with the entire team of twenty-two people traveling from country to country. The team members had continually moved from site to site for activities such as status reviews, design meetings, and prototyping sessions. The cost of the travel was tremendous, not only for hotels and airline tickets but also in terms of the human costs of being away from home and lost work time and productivity. In addition, talent from other parts of the organization was not leveraged in this effort—if you were not “on the plane,” your ideas were not heard.

Contrast this with most other organizations that form world-class teams, with membership from many different locations and functions, to quickly address customer

problems, develop products, and deliver services. These teams often operate virtually, without the physical limitations of distance, time, and organizational boundaries. They use electronic collaboration technology and other techniques to leverage the best talent where they might reside, lower travel and facility costs, reduce project schedules, and improve decision-making time and communication.

Organizations that do not use virtual teams effectively may be fighting an uphill battle in a global, competitive, and rapidly changing environment. Organizations that will succeed in today's business environment have found new ways of working across boundaries through systems, processes, technology, and people. They will make technology a valued partner in developing and delivering competitive solutions.

Understanding how to work in or lead a virtual team is now a fundamental requirement for people in many organizations. Many who began their career leading teams in a face-to-face environment find themselves leading teams virtually, sometimes not seeing team members face to face more than once or twice a year. This presents the challenge of translating what worked in an in-person environment to a virtual one.

It is also now increasingly common to encounter people who lead or work on virtual teams who do not have a great deal of experience working on teams face to face. Most of today's large consulting firms do a large majority of their work virtually. Consultants who join these firms may never have the opportunity to work on or lead a traditional team in a face-to-face environment. They are immediately placed in situations that are more virtual than traditional. In this case, these individuals may not even have baseline experience to draw from—and on the other hand, they also may not have bad habits to unlearn.

The fact is that leading a virtual team is not like leading a traditional team. People who lead and work on virtual teams need to have special skills, including an understanding of human dynamics and performance without the benefit of normal social cues, knowledge of how to manage across functional areas and national cultures, skill in managing their careers and others without the benefit of face-to-face interaction, and the ability to use leverage and electronic communication technology as their primary means of communicating and collaborating.

Types of Virtual Teams

There are many different configurations of virtual teams. One of the central themes of this book is that the task affects how a virtual team is managed. Although virtual teams can undertake almost any kind of assignment, team leaders and members need to have a solid understanding of the type of virtual team they work on and the special challenges each type presents. What these teams have in common with all teams is that team members must communicate and collaborate to get work done or to produce a product. Virtual teams, unlike traditional ones, however, must accomplish this by working

across distance, time, and organizational boundaries and by using technology to facilitate as their primary means of communication and collaboration. There are seven basic types of virtual teams.³

- Networked teams
- Parallel teams
- Project or product development teams
- Work, functional, or production teams
- Service teams
- Management teams
- Action teams

Networked Teams

A networked virtual team consists of individuals who collaborate to achieve a common goal or purpose. Such teams frequently cross time, distance, and organizational boundaries. Typically, there is a lack of clear definition between a network team and the organization, in that membership is frequently diffuse and fluid, with team members rotating on and off the team as their expertise is needed. Team members may not even be aware of all the individuals, work teams, or organizations in the network.

Examples of this type of virtual team are often found in consulting firms and in high-technology organizations. For example, one virtual team received a request from a client to quickly research and identify a set of best practices for managing the implementation of a large supply chain project. Although the consultants did not have all the answers themselves, they were able to tap into their network of external partners and internal and external databases and provide a set of best practices for the client within a few days.

Organizations that develop technological products can also use networked virtual teams. Many research and development organizations use networked teams for many activities because the specialized expertise to solve new problems or engage in complex discovery processes usually never resides in a single organization or location. Team members for these types of teams are often drawn from many different nations, think tanks, universities, corporations, and nonprofit organizations. Team members from different organizations come in and out of the network as their expertise is needed to make recommendations.

Parallel Teams

Parallel virtual teams carry out special assignments, tasks, or functions that the regular organization does not want to or is not equipped to perform. Parallel teams are also used when expertise does not reside in one location or in one organization. Such

teams frequently cross time, distance, and organizational boundaries. A parallel team is different from a networked team in that it has a distinct membership that sets it apart from the rest of the organization. It is clear who is on the team and who is not. The members of a parallel team typically work together on a short-term basis to make recommendations for improvements in organizational processes or to address specific business issues. Virtual parallel teams are becoming a fairly common way for multinational and global organizations to make recommendations about worldwide processes and systems that take a global perspective.

One consumer goods company used a virtual parallel team to make specific recommendations for a global customer loyalty system. Team members came from around the world and were supplemented by participants from an external consulting organization. After its recommendations were made to the CEO, the team dissolved. Much of the work of this team involved data collection and analysis by individual team members. The collaborative work was often accomplished in audioconferences at 7:00 A.M. Eastern Standard Time (to accommodate people from all time zones) by using e-mail to communicate and pass on “static” information, a team Web site for documenting progress, and instant messaging for real-time communication. Like many people who work on parallel teams, the team members had other projects and accountabilities.

Project or Product Development Teams

Virtual project teams and product development teams can also cross time, distance, and organizational boundaries. Team members conduct projects for users or customers for a defined but extended period of time. A typical result is a new product, information system, or organizational process. The difference between a project team and a parallel team is that a project team usually exists for a longer period of time and has a charter to make decisions, not just recommendations. A project team is similar to a networked team in that team members may move on and off the project as their expertise is needed. It is different from a networked team in that membership is more clearly delineated from the rest of the organization, and a final product is clearly defined.

Most product-focused technology and scientific organizations are well versed in the use of project or product development teams. The use of virtual teams expands the opportunities to leverage expertise from wherever it resides to develop products and services that have competitive advantage.

Work, Functional, or Production Teams

Virtual work, functional, and production teams perform regular and ongoing work. Such teams usually exist in one function, such as accounting, finance, training, or research and development. They have clearly defined membership and can be distinguished from