



Remote and Virtual Team Excellence

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Objective

Presentation Objective

- Understand the environment and issues related to working remotely and virtually
- Learn some best practices so you can apply them to sustaining remote workers and remote teams

Format

- Lecture with questions and discussion *at any time*
- I will make these slides available to you

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AGENDA

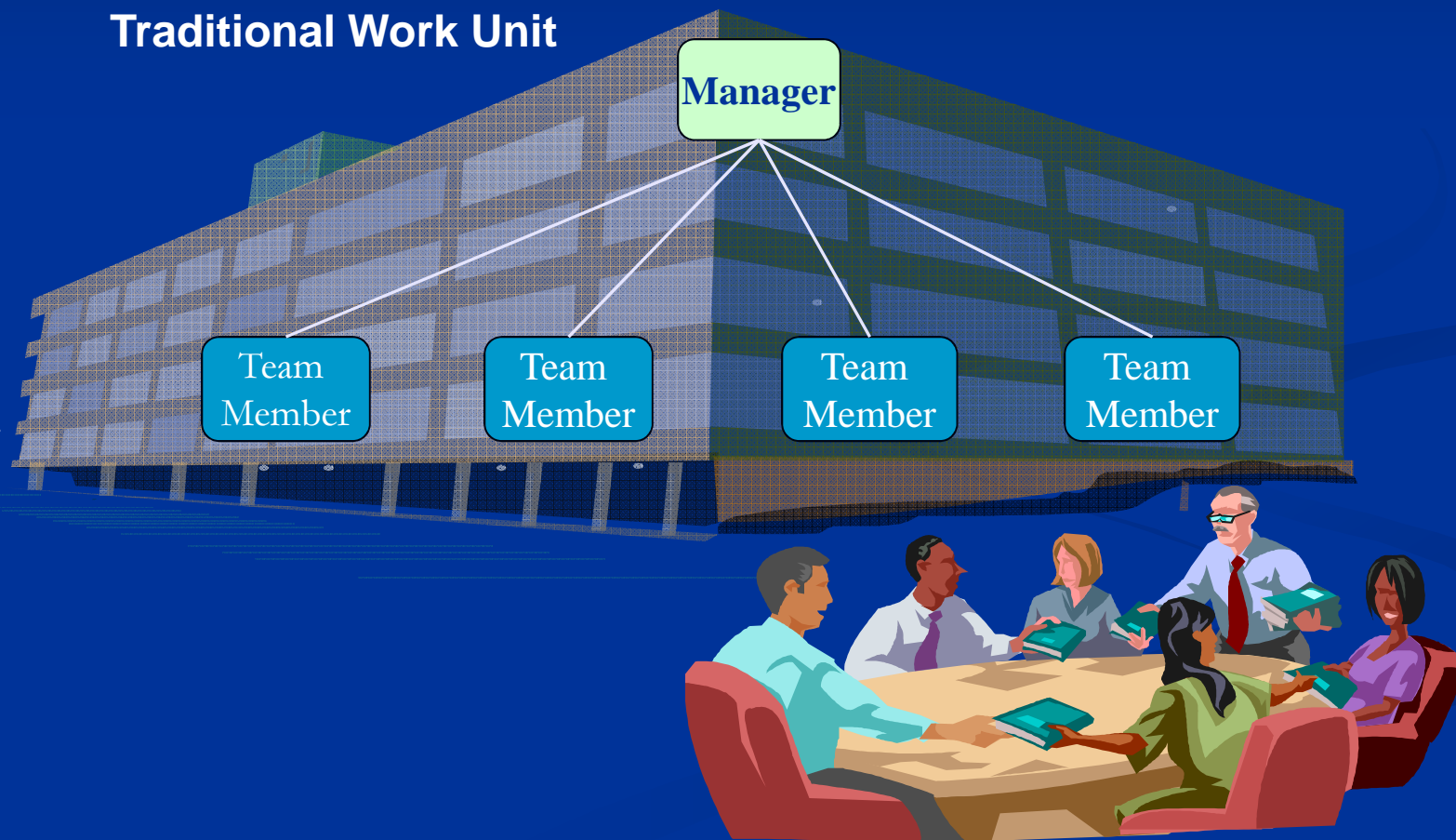
- Section I Understanding the Landscape
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- Section V Education and HR Recommendations
- Section VI Team Building
- Section VII Effective Remote Team Meetings
- Section VIII Understanding Cultural and Generational Differences

Today's work environment has become very complex, even without Remoteness

Past	Today
Moderate pace of change	More complexity and faster pace of change
A single boss	Multiple lines of reporting
Working on a single team	Working & contributing to many teams
Limited & unreliable technology	Many, reliable technologies to learn
Experts have knowledge	Expert knowledge available to many
Limited communication paths	Greater variety and speed of communication
Mono-culture	Multi-cultural
A few decision makers	Many stakeholders in every decision
A single work location	Multiple, dispersed work locations

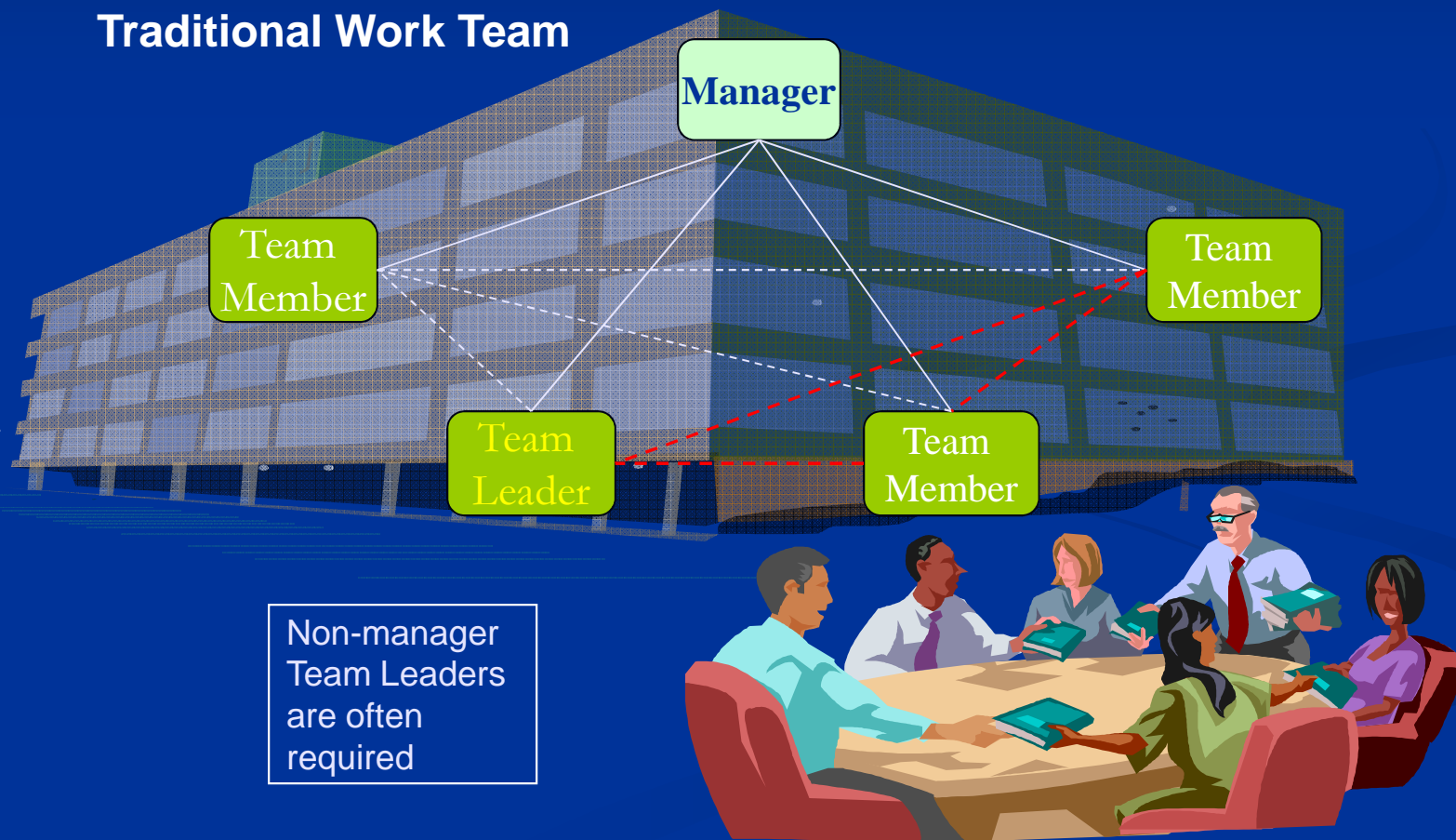
A traditional **Work Unit** is when a team is physically in the same place and all team members receive direction directly from the same manager

Traditional Work Unit



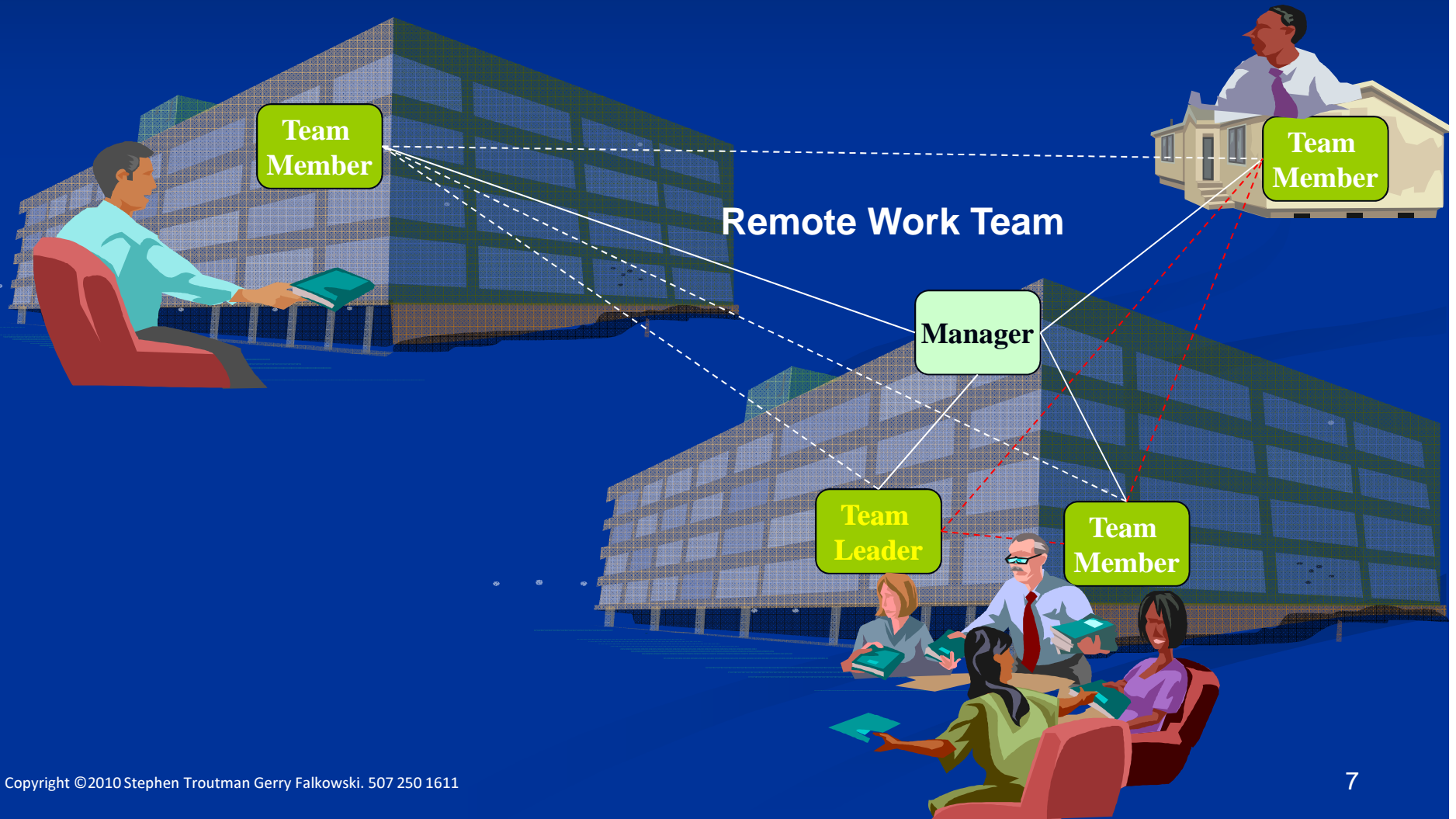
A **Work Team** is like a work unit, but there is delegation, autonomy, and collaboration across the team

Traditional Work Team

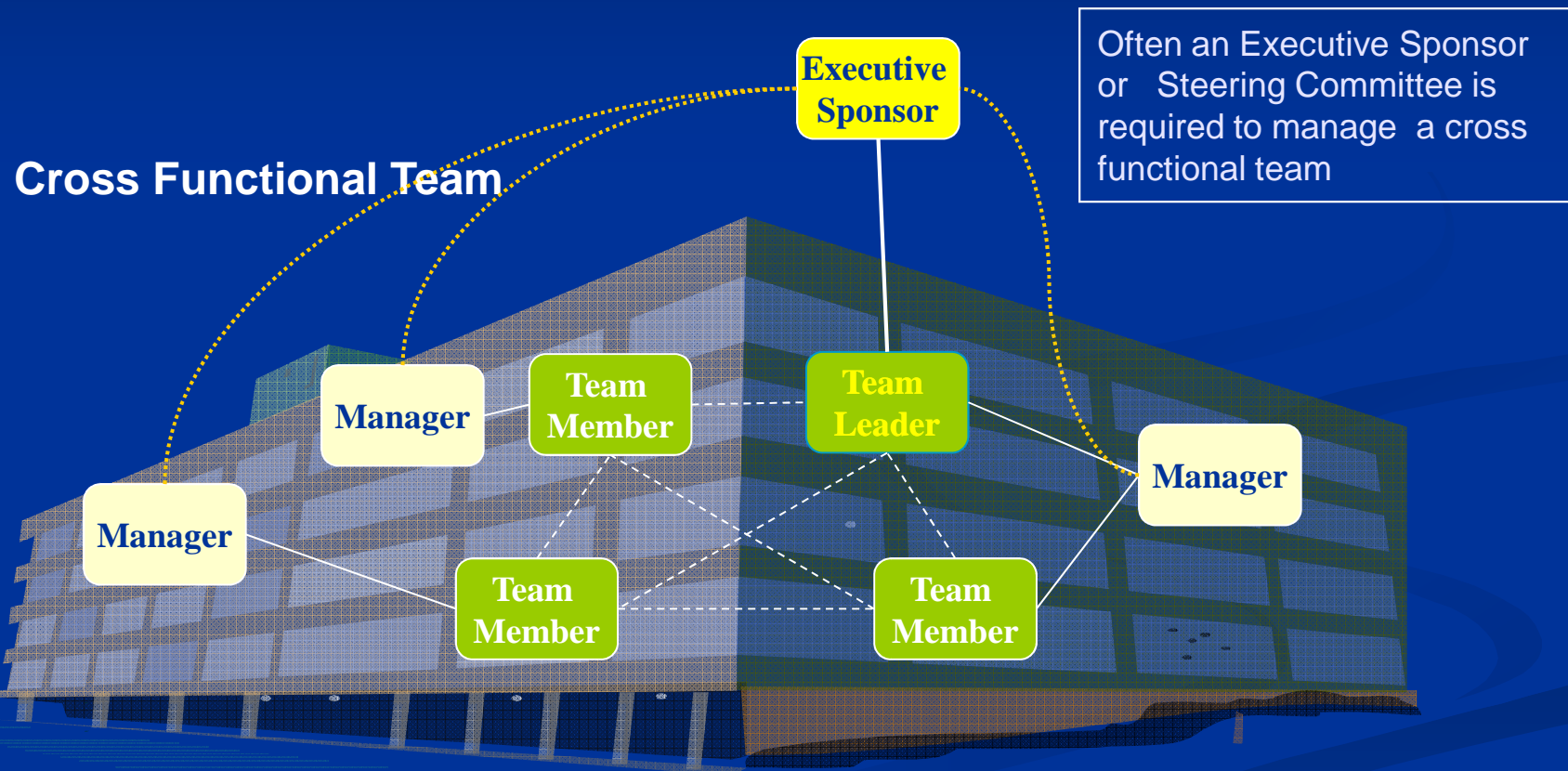


Non-manager
Team Leaders
are often
required

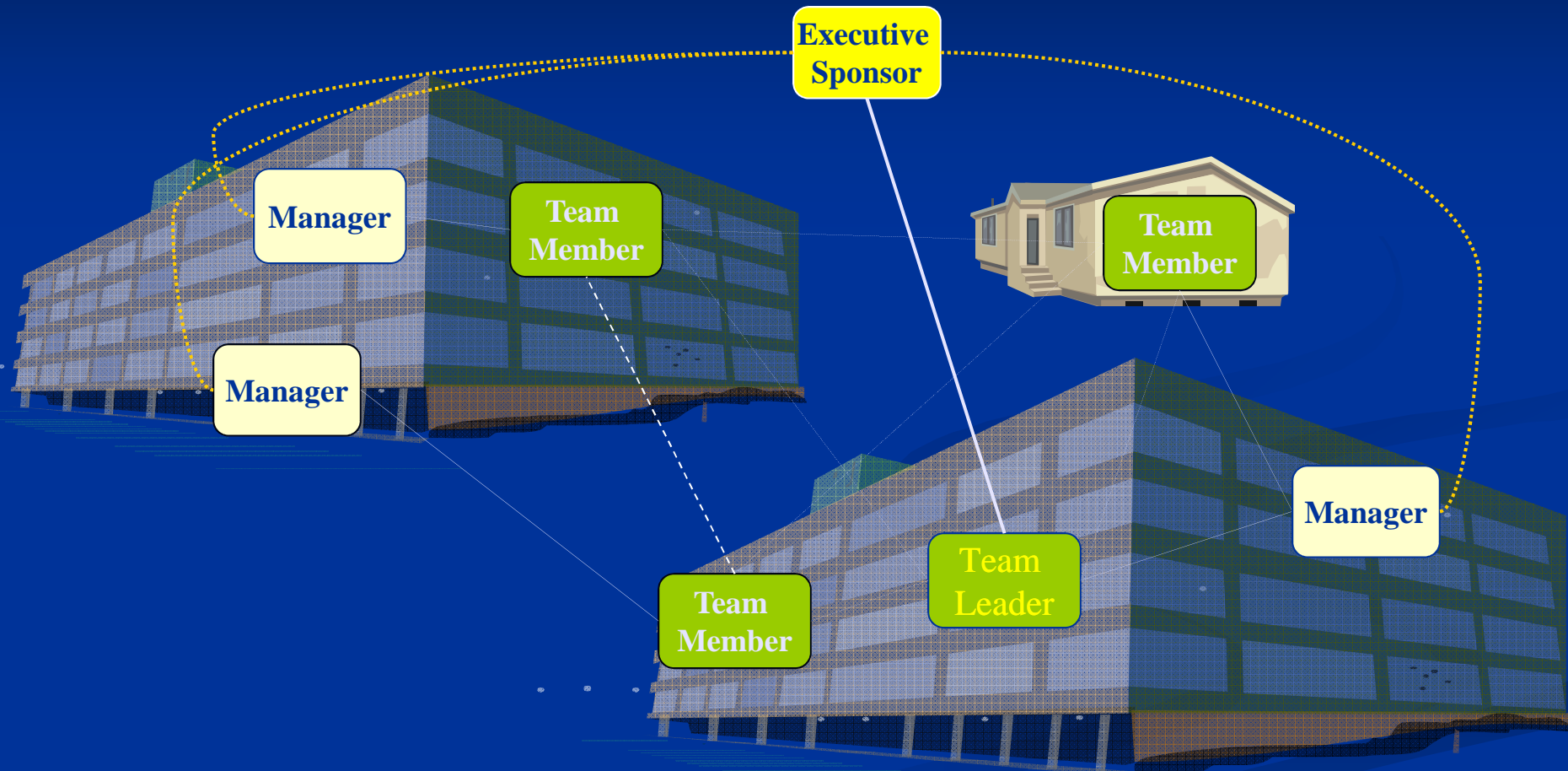
Remote is when the employees of a Unit or Team are physically dispersed and have members who work far away from each other



Cross Functional Teaming is when the team members have multiple managers, and an Executive Sponsor* is required



A Virtual Team is Cross Functional and *also* Remote



What are the benefits of working remotely?

- **Benefits**

1. **Reduce costs:** operating expense (heating, cooling), travel (mileage, air, lodging, meals) and capital (office space)
2. **Productivity boost:** no time lost for travel and commuting, in office interruptions, and face to face meeting logistics
3. **Expert skills are more available:** expertise can be applied across many locations (and projects) and the need to 'staff up' can be avoided
4. **More issues can be addressed:** large, cross functional problems, which were too large to be solved locally, can be addressed remotely
5. **And ...**

5. Remote workers are happier and more productive, if they are managed properly



There are challenges in operating remote teams and being remote employees

- Challenges

1. **Frustration with loss of face-to-face contact:** Working with people that you cannot see, managing remotely, and being managed remotely are difficult
2. **Leveraging automated tools and techniques:** Learning and using the tools which support remote work (conferencing, file sharing, instant messaging) is a base requirement for working effectively
3. **Building trust:** it can be difficult to establish rapport and build trust remotely with team mates, peers, employees and managers

There are challenges in operating remote teams and being remote employees (continued)

- Challenges

4. **Collaborating at a distance:** working together and solving problems is difficult without proper management support and planning
5. **Cultural differences and time zones:** working together is more difficult when time zones and other boundaries are crossed (especially with different languages and cultures)
6. **Managing career planning and progression:** remote employees may have different needs and see inequality between themselves and local employees.

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Some managers think the following advice is all that is needed for an employee to operate remotely.

“All you need is:

- A place to work, away from distractions and noise ,
- A good phone, with head set and/or speaker,
- A high speed internet connection,
- And a mute button.”

But remote employees have many other fears about working remotely

1. How will I understand work tasks coming from another location?
2. How will I work with others when we 'are not together'?
3. How will I get to know people and build trust if I 'am not there'?
4. How will I get supplies? Where will I store stuff?
5. How will I set up my work area?
6. What support will I have? Where will I go to get help?

Remote employees have many other fears about working remotely (continued)

7. How will my manager get to know me when I 'am not around'?
8. How will my manager "see" the work I am doing?
9. How will my performance be appraised?
10. How can I compete with 'local' people?
11. What will happen to my career planning?
12. How will I deal with 'being alone'?

The concerns on the preceding two slides are real and go far beyond the advice about “headsets and internet”.

- Most of their concerns involve ‘soft’ issues, such as dealing with their business relationships, rather than the ‘harder’ issues of the actual work and tools.
- The employee concerns imply that employees need a different mind-set when approaching remote work.

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The requirements of successful management do not change in a remote environment

- Leadership is the most critical requirement, including
 - **Knowing your employees**, their skills, their strengths and weaknesses, their wants and desires
 - **Understanding the work requirements.** Prioritizing, planning, and managing it
 - **Providing clear, consistent guidance** to individual employees and teams, and communications to all, including management
 - **Being fair and equitable** (which includes dealing with the reality that your employee is remote)

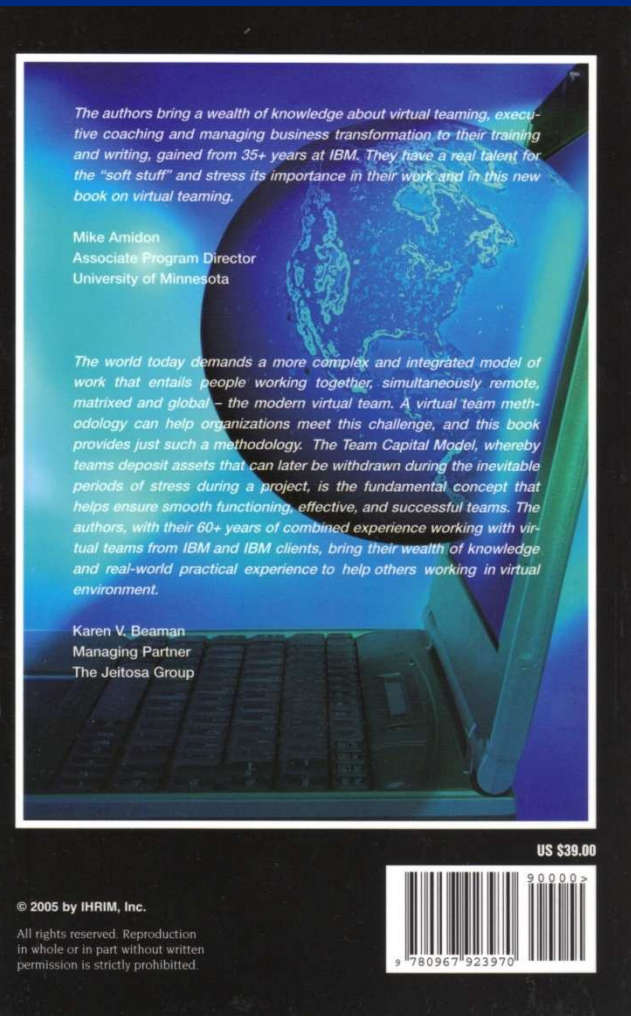
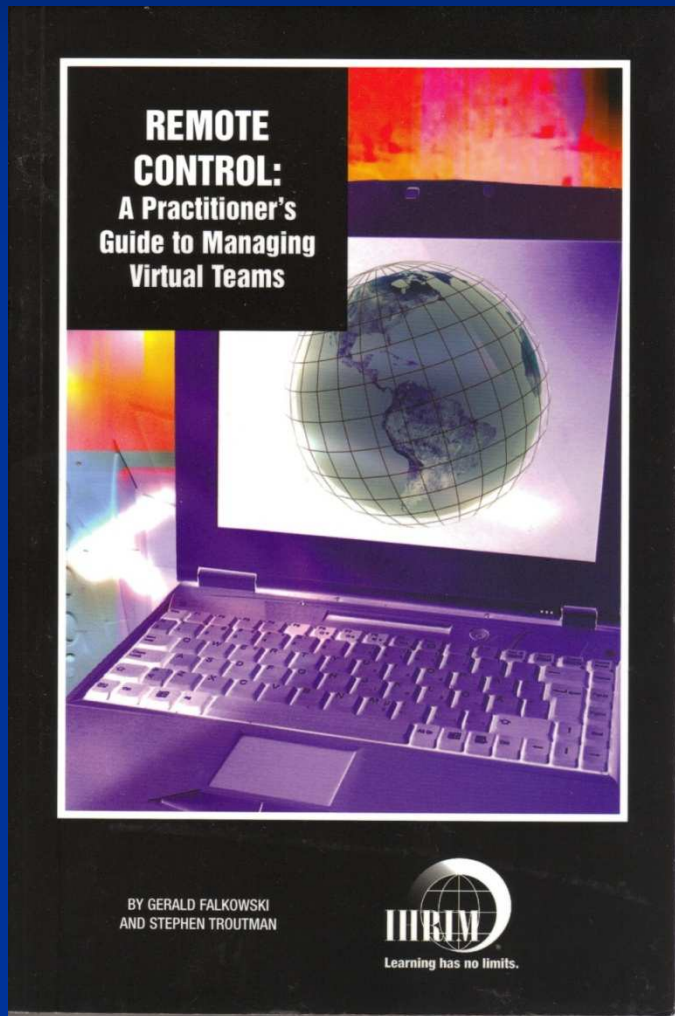
- The basics do not change because your employees are remote

When face-to-face, team formation and building relationships is a naturally occurring process

- **The physical elements are all available for team building:**
 - ❖ **Hearing** - introductions, presentations, conversations
 - ❖ **Sight** - the room, handouts, smiles, frowns, rolling eyes, nods
 - ❖ **Touch** - hand shake, writing on flip chart
 - ❖ **Smell & Taste** - coffee, dry erase markers, lunch

- **Social interaction enables fully engaged team building:**
 - ❖ **Being together** - having a shared experience
 - ❖ **Unhindered interchange** – ability to have conversations inside and out of the meeting room
 - ❖ **Nuanced Interaction** – can see acceptance, frustration, irritability, etc.

When we wrote our 2005 book, we could not find any models, in the literature, which described *remote* or *virtual* teaming

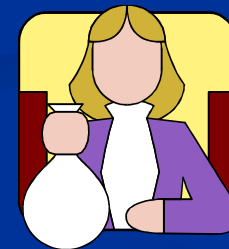


We created our own Team Capital Model*, based on the metaphor of a bank, to describe high-performance teaming

The ‘assets’ we ‘deposit’ are elements of team strength. We can later ‘withdraw’ these “assets” to sustain our high performance team, when it is under pressure.

Deposit to build the team

- *Sight, Hearing, Touch, Smell/Taste*
- *Rich shared experience*
- *Common information*
- *Personal engagement*
- *Bonding as a team*



Withdraw to sustain a team's work

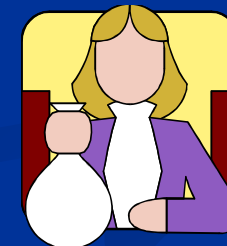
- *High performance teaming*
- *Joint problem solving*
- *Trust and risk taking*
- *Effective decision making*

We realized you will have less “assets” to in a remote or virtual environment

Deposit

- ~~Sight~~, ~~Hearing~~, ~~Touch~~, ~~Smell/Taste~~
- ~~Rich shared experience~~
- Common information
- Personal engagement
- Bonding as a team

Subtract

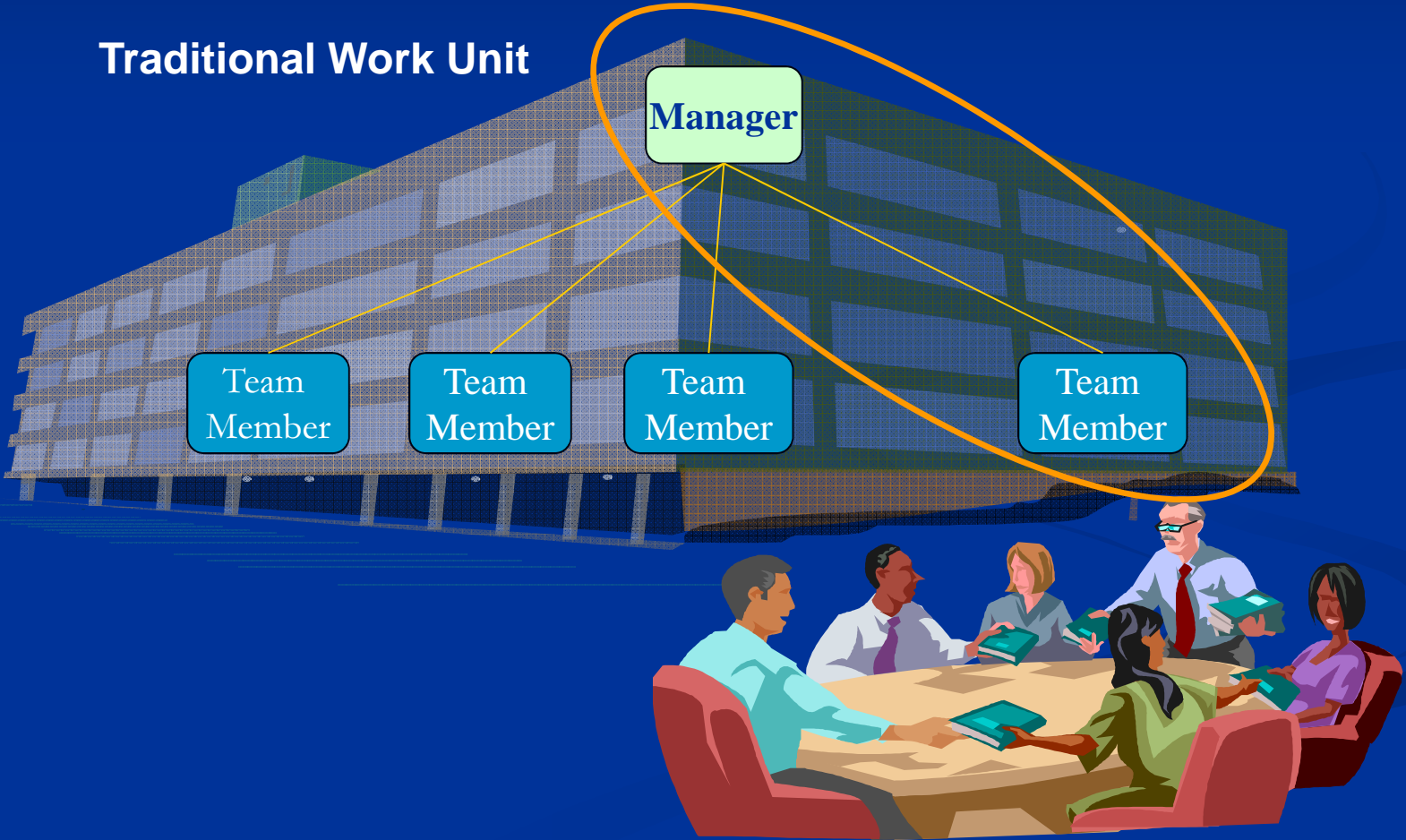


Withdraw

- High performance teaming
- Joint problem solving
- Trust and risk taking
- Effective decision making

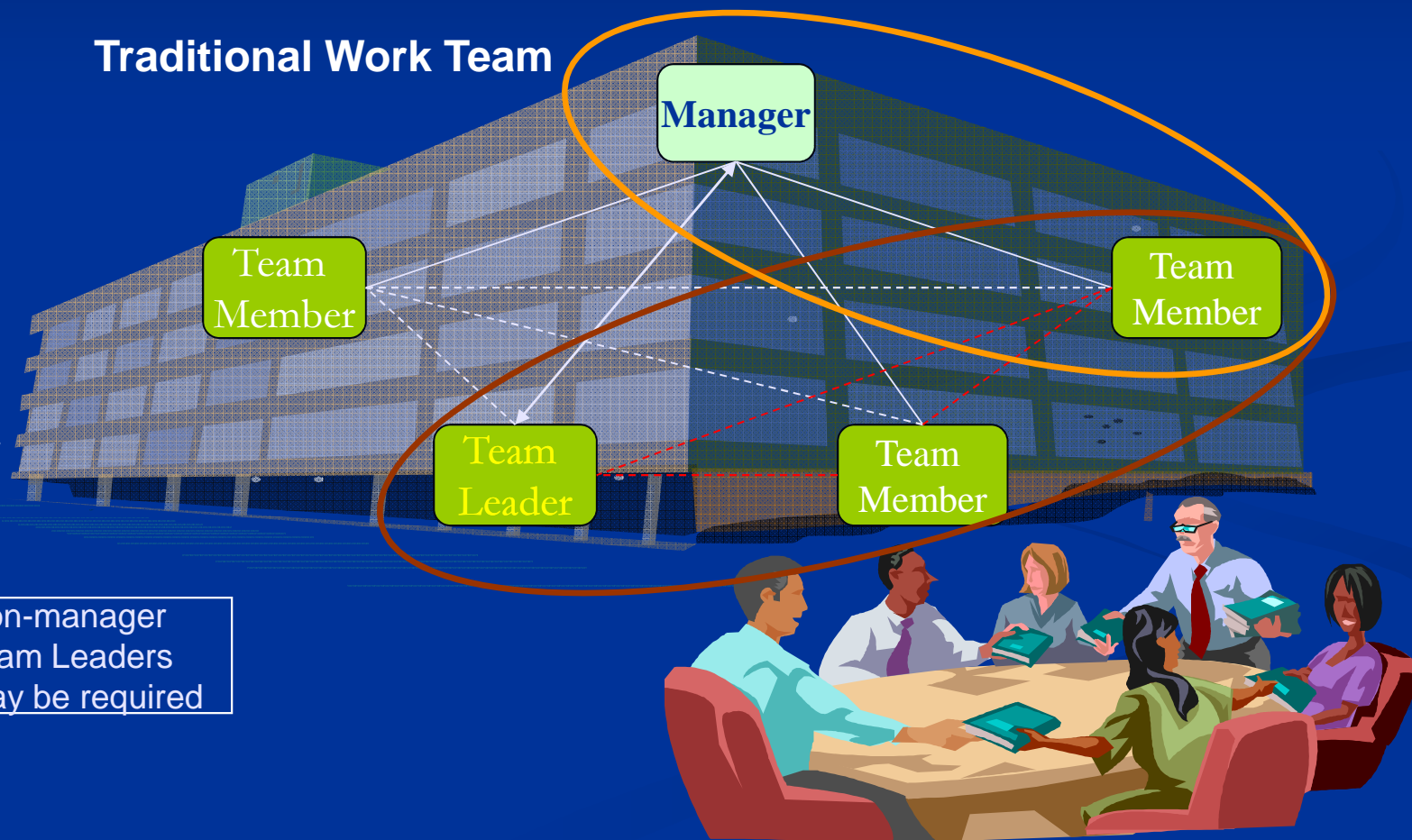
In a traditional Work Unit the individual employee has a one on one, face to face, relationship

Traditional Work Unit



In a *Work Team* environment the manager and employee have a more complex relationship, which includes the Team Leader and other peer workers

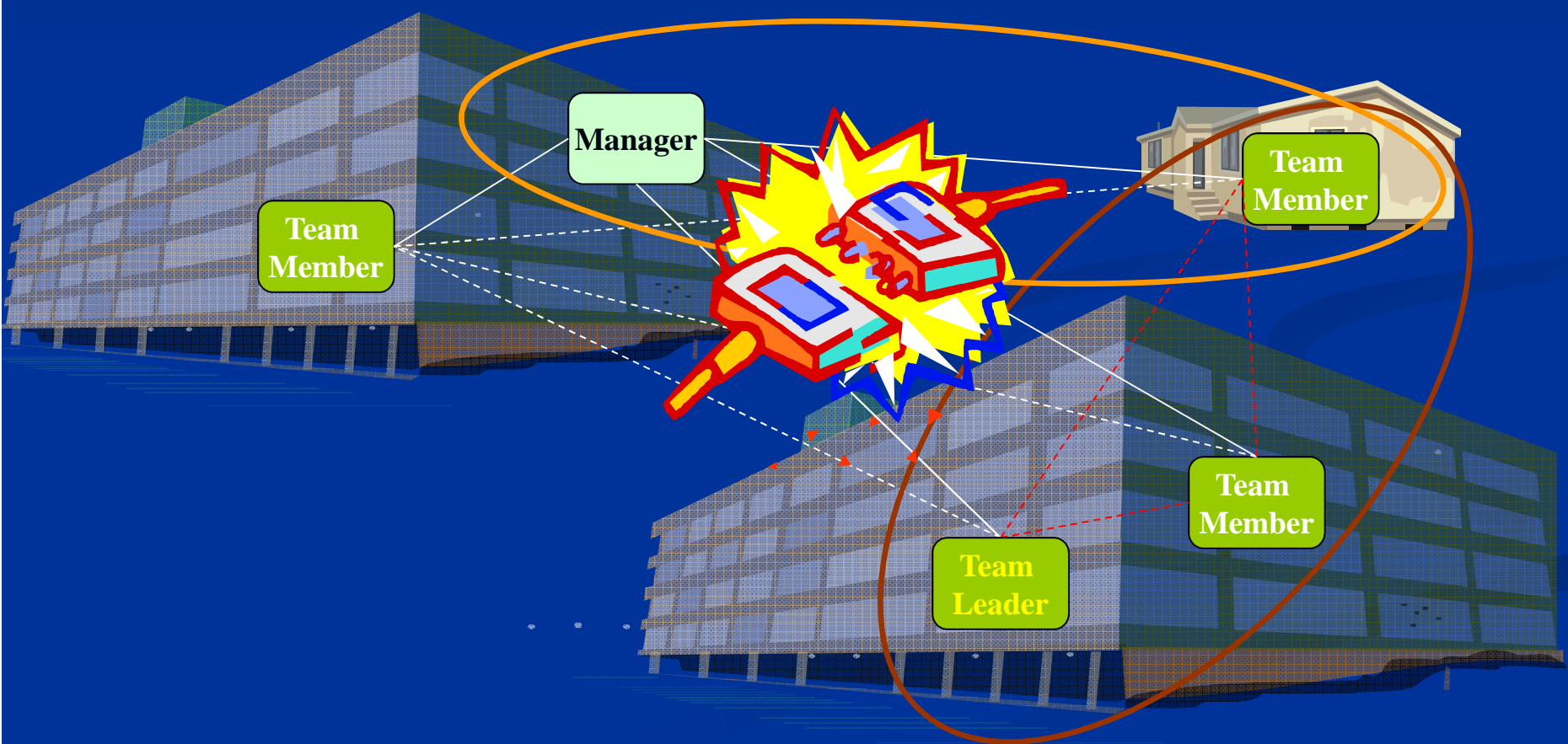
Traditional Work Team



Non-manager
Team Leaders
may be required

In a **Remote** environment there is the same Unit or Team relationship complexity, but with the added impact of physical separation

Remote Work Team



Managers of remote employees know that some activities are harder with physical separation

■ Many things become harder for a Manager:

1. To know your employees when they 'are not around'
2. To understand work requirements which 'spread over' multiple locations
3. To build trust ,without face to face contact
4. To track and manage work 'being done elsewhere'
5. To collaborate and work together ,when you 'are not together'
6. To guide the careers of people who 'are not here'
7. To provide clear, consistent guidance to people you know less well, and about work you do not understand as well

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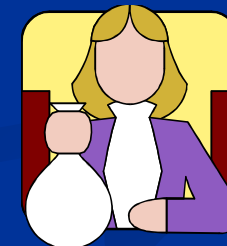
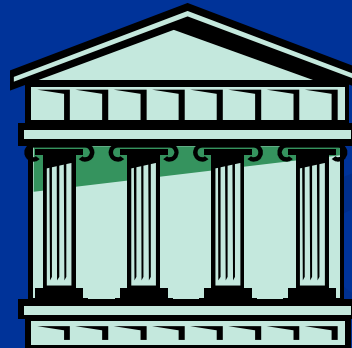
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We recommend that you compensate for the lack of face-to-face capital in a remote or virtual environment

Deposit

- ~~Sight, Hearing, Touch, Smell/Taste~~
- ~~Rich shared experience~~
- Common information
- Personal engagement
- **Team Building/Facilitation**
- **Project Management**
- **Change Management**
- *Bonding as a team*

Lost
Added



Withdraw

- *High performance teaming*
- *Joint problem solving*
- *Trust and risk taking*
- *Effective decision making*

Remoteness does require additional work in some traditional management tasks

Management Skills	Traditional Leader Roles	Extra Work Due to Remoteness
Provide Leadership Direction	X	
Performance Planning	X	
Building trust	X	X
Planning and tracking work	X	X
Leveraging tools and techniques	X	X
Facilitating and collaborating	X	X
Counseling and Evaluation	X	
Career Planning & Managing	X	X
Morale and Retention	X	

The skills required to compensate for being remote are critical, but not difficult to acquire

Expertise that must be developed:

- ***Elementary Team Building and Facilitation***
 - expertise for engaging and sustaining performance of a team and individuals, including a few best practices from Facilitation and Team Building disciplines

- ***Rudimentary Project Management***
 - expertise in how to plan and manage the work activities, including a few best practices from the Project Management discipline

- ***Some Change Management***
 - expertise in how to succeed in implementing change, including a few best practices from the Organization Change Management (OCM) discipline

Here are the recommended **Team Building and Facilitation** techniques for engaging and sustaining a Remote team:

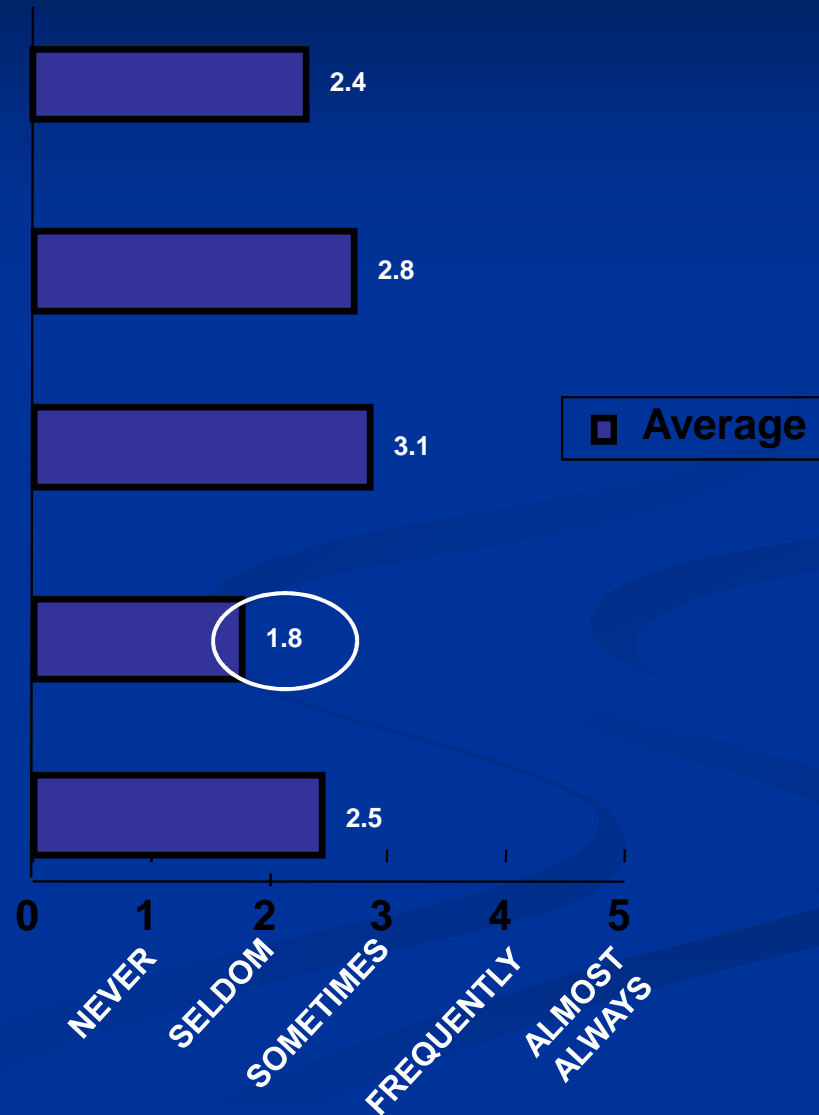
1. Be open and honest at all times
2. Celebrate success frequently, even small victories.
3. **Develop a team operating guide.**
4. **Check “team health” regularly.** Discuss good teaming behavior
- 5. Encourage and enable participation and dialogue.
- 6. Encourage laughter, have fun (yes, over the phone!).
- 7. Make time for social interaction in each meeting.
8. Recognize individual *and* team achievement.

Team Operating Principles and Guidelines need to be developed, and agreed to, to help guide the team.

Operating Principles	How Our Remote Team Will Work Together
Appreciation	<ul style="list-style-type: none"> • Respond to individual needs and uniqueness • Verbalize & publicize the good things about each other
Innovative	<ul style="list-style-type: none"> • Be flexible, adaptive and value ideas of others • Provide ideas based on our experience & data
Loyalty	<ul style="list-style-type: none"> • Keep team differences within the team • Support the efforts, insights, & ideas of others
Professionalism	<ul style="list-style-type: none"> • Acknowledge requests and meet commitments • Communicate schedule/due date conflicts ahead of time • Support consensus team decisions
Respect	<ul style="list-style-type: none"> • Listen quietly - allow others to speak uninterrupted • Hold one conversation at a time
Trust	<ul style="list-style-type: none"> • Give & accept feedback (praise, suggestions, criticism) • Be open and honest

Conduct Team Maturity Assessments

- Q1. There is consensus and commitment among team members regarding our common purpose and goals.
- Q2. Our team leader makes clear, consistent demands of our team, and holds us accountable for results.
- Q3. We hold ourselves mutually accountable for our results (i.e., we succeed or fail as a team; no “finger pointing” or placing blame).
- Q4. As a team, we have agreed on a common approach to working together.
- Q5. Members of the team work hard to overcome barriers that stand in the way of collective performance.



Here are the recommended **Project Management** techniques to plan and manage Remote team work activities:

1. Document agreed to work scope and deliverables of each work activity
2. Plan in detail the actions steps to achieve the deliverables.
- 3. Track progress and results from you plans.**
4. Always plan the steps to gain and sustain buy-in.
- 5. Plan team building activities into the ongoing schedule.
6. Plan for frequent regular communications.
- 7. Plan meetings just like you plan the work (steps 1-5 above).
8. Verify consensus at all levels to work scope and deliverables.

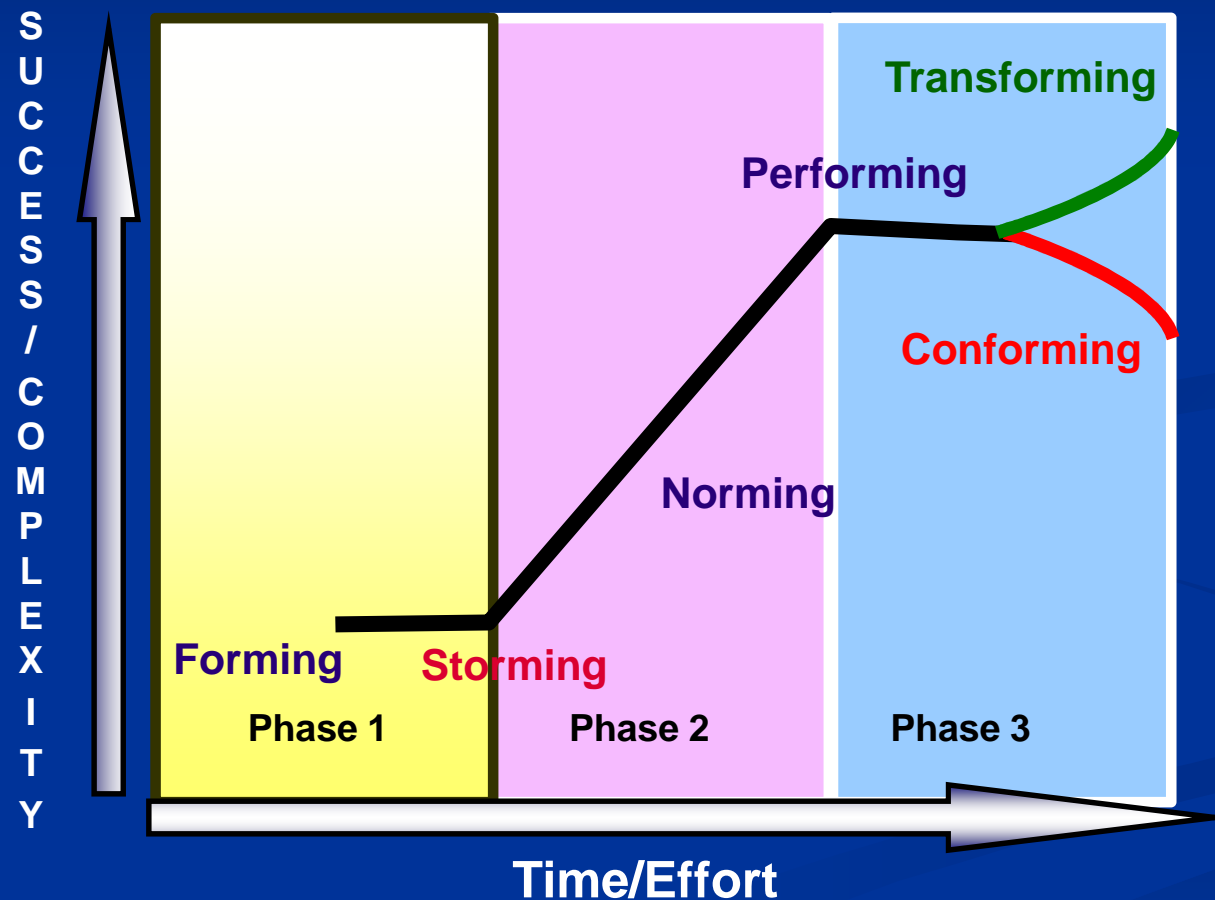
Planning Document (Example)

Cat # Item #	Category Action or Task Item	Duration and Notes	Start Date	Due Date	Named Owner & (Assisting)	Prerequisite [Task Item and item #]
00	Team Formation	-		-	-	-
00b	Gain agreement from executive stakeholders to act as Steering Committee members	2 wks, gate is getting to the Execs	07/16	08/01	Bob (Steve)	Project Walk Through presentation 03d
00a	Form core Project Team	3 days	08/01	08/04	Steve (Jim & Bob)	Proposed Team List 04b & Exec OKs
00c	Conduct complete project walkthrough with Project Team (requirements, design criteria, concept, etc.)	1 day		08/05	Steve (Bob)	
00d	Expand the task list to include all tasks for the project.	1 wk	08/05	08/12	Jim (Steve)	
00e	Assign resources to all tasks	2 wk	08/05	08/24	Jim (Steve and Task Owners)	Steering Committee 00b, and Proposed Team List 04b

Here are the recommended **Organization Change Management** techniques to get results in a Remote team environment:

1. Align rewards *of all kinds* to the work goals and to team health.
2. **Be cognizant of the development stages through which teams pass.**
3. Align measurement and metrics, as much as possible
4. Communicate both work and team health results.
5. Ensure executive sponsorship spans the scope of the work.
6. Manage and “work” the management system process, escalate problems.

Remote teams will go through the same stages of development, as any other team.



Forming

- Initial orientation

Storming

- Conflict & Confusion

Norming

- Consolidation around tasks

Performing

- Teamwork & performance

Transforming

- Revitalize to new purpose

Conforming

- In a rut
- Lost purpose

Source: Organizational Behavior,
Hellreigel, Slocum and Woodman

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Beyond our recommendations for team management, we have *additional recommendations for education and training*:

- **Enhancing manager skills in delegation and collaboration, including:**
 - Delegating to remote employees (procedures and policies)
 - Embracing the non-manager Team Leader role
- **Enhancing skills in how to manage remote work activities and time.**
 - Many will need additional skills in work management and communication techniques, as remote and cross-functional work assignments increase
 - How to “work” the management system, and escalate problems, in a remote and cross-functional environment, will also be important
- **Belonging programs for employees:**
 - “On-boarding to Remote” because moving out of the office is hard for some
 - “Mitigating Being Alone” to overcome the inability to meet face to face

Beyond our education recommendations, we have *additional recommendations for Human Resources:*

- **Job roles may need to be redefined**
 - Remote work skills need to be included in job descriptions
 - The autonomous, self directed, nature of remote should be acknowledged
- **Career paths may need to be remapped**
 - Need clear paths for remote advancement “if I stay at home”
 - Remote versus “in house” career paths
- **Remote employee equality management**
 - Assessment processes (e.g. for diversity) may need to be extended to remoteness
 - Are remote employees happy? ...being treated fairly?

Managers of remote employees can use the same techniques as those recommended for remote teams, but tailored to the individual employee

- Use the three checklists for remote team success, with only slight modifications to make them apply to remote employee success.
- Here is **Team Building and Facilitation** modified for a manager to use with an individual employee, instead of a team:
 - Be open and honest at all times
 - Celebrate success frequently, even small victories.
 - Develop a ~~team~~ employee/manager operating guide.
 - Check “~~team~~ employee health” regularly. Discuss good ~~teaming~~ behavior
 - Encourage and enable participation and dialogue.
 - Encourage laughter, have fun.
 - Make time for social interaction in each meeting.
 - Recognize individual *and* team achievement.

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What does trust feel like?

This is what remote trust feels like:

- Like you're in the same room, like you're working with colleagues locally.
- You really want the chance to invite each other to a barbecue.
- There's no "putting on airs" or withholding information, you can express yourself freely and openly in any situation
- I know when they say they will do something, they will.

Trust can be elusive, but when you have it will power team effectiveness

- Trust is built on our perceptions of others behaviors.
 - If someone *meets their commitments to us*, we trust them
- And a key to trust building is our expectations of each other
 - If I thought it was a *secret*, but you thought it was *public knowledge*. I am set up for disappointment and you for the loss of my trust
- So the key to trust building is two things:
 1. Shared expectations (about an important issue), and
 2. Meeting those expectations (perception is equal to reality).
- In a team environment, a Trust Assessment can surface issues so the team will know their trust level and can do something about it

Remote Team Trust Assessment Results (Example)



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In our book, we have provided detailed checklists for meeting preparation and execution

All aspects of the meeting process are covered:

- ❑ Checklist 1: Plan the Remote Meeting (i.e. conference call).
- ❑ Checklist 2: Pre-meeting Activity.
- ❑ Checklist 3: Pre-meeting Documentation.
- ❑ **Checklist 4: Remote Facilitation Techniques.**
- ❑ Checklist 5: Remote Facilitation Logistics.
- ❑ Checklist 6: Post-meeting Activity.

The scope and breadth of these checklists highlights how important we think this is in a remote environment

Checklist 4: Remote Facilitation Techniques.

- Overview the *Agenda*, including:
 - Outcome expectations, and
 - Timing expectations
- Follow the well planned *Agenda*
- Paraphrase comments and questions to confirm understanding
- Limit discussion to ensure we achieve the most important agenda goals
 - The moderator or any participant may invoke this
- □ Engage inactive participants with open ended questions
- □ Seek consensus confirmation of all key discussion points or decisions
- □ Encourage laughter and personal engagement
- □ Non-business conversation is encouraged before and after the meeting

Manage the people who monopolize the meeting

Techniques to stop unproductive discussion include:

- ❑ Request a “closing sentence” from the speaker
- ❑ Engage another participant (e.g. Thanks, Jim. Now lets hear from Bob)
- ❑ Acknowledge that “we all agree,” and change the topic
- ❑ Propose a follow-up meeting and thereby take it off today’s agenda
- ❑ Invoke the agreed to meeting guidelines (e.g. to stay on time)
- ❑ Ask for consensus from others that we should move on

Using checklists ensures we do not miss important elements which are needed for high performance teaming

- By design, the checklists focus on the “soft” issues (like activities to gain buy-in) because these issues are often given less interest
- Remote meeting preparation and execution is critically important, because it is the principle way in which we come together as a team

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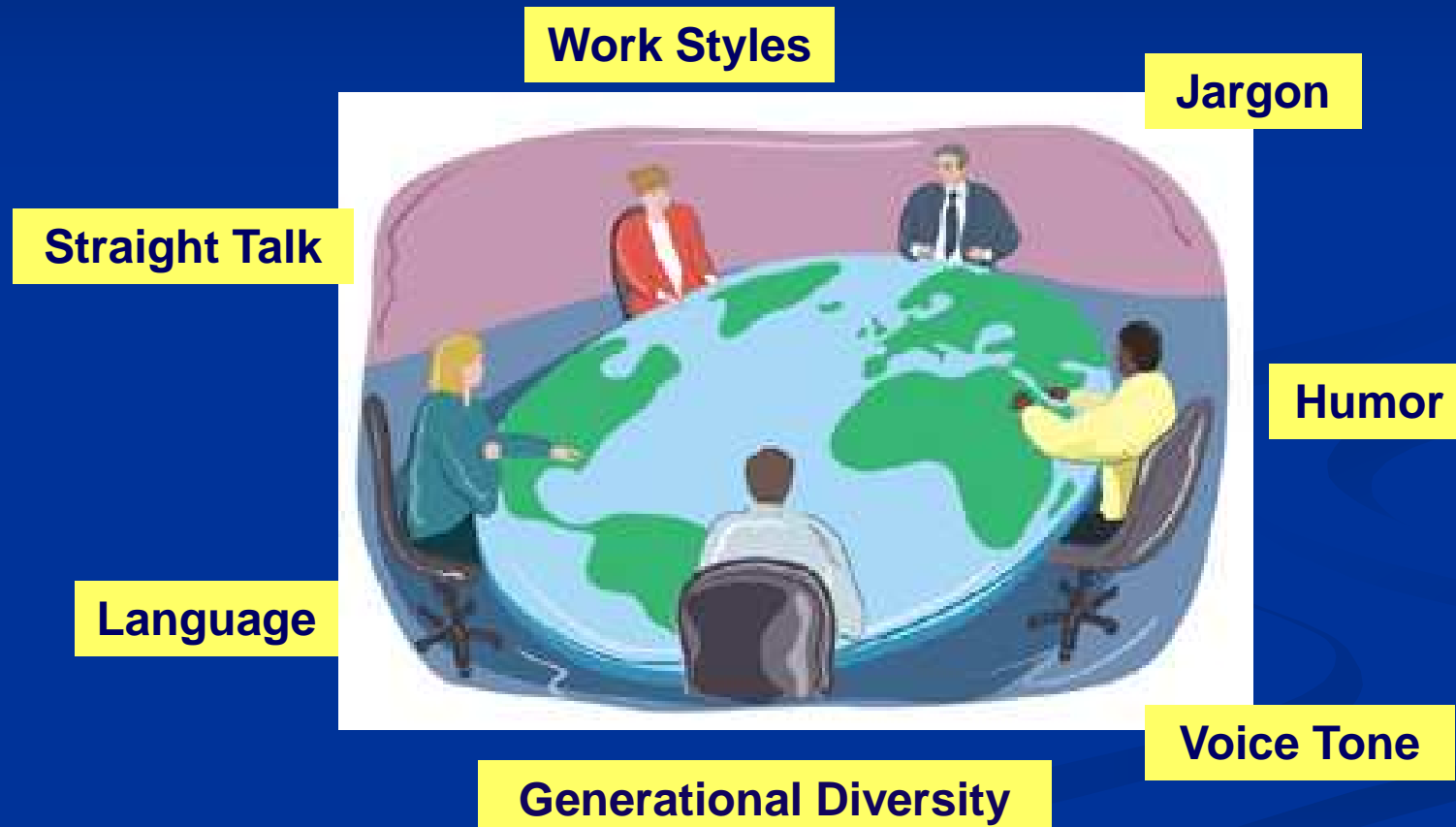
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Cultural differences are real and can have enormous impact on a team's performance.

- Culture is the totality of socially-transmitted attitudes, behaviors and beliefs distinct to a particular community or group.
- A universal workplace reality is that not everyone thinks and acts as you do.
 - ❖ What's considered 'normal' in one organization or country may be considered 'not normal' in another.
 - ❖ What is expected of one group may be considered shocking or rude to a different group.
 - ❖ What is accepted protocol in one organization or country may in fact be frowned upon in another.

Effective remote team leaders spend time in their meetings to help the team understand how cultural and generational differences impact team behaviors.



Jargon and humor can be used effectively to engage the remote team.

Jargon

- Jargon is the specialized vocabulary and language of those in the same work or profession
 - Define terms for jargon that the team can understand

Humor

- Humor is one of the most important skills for effective interpersonal communication, yet one of the most elusive
 - Some people are naturally personable and likeable, others have to work at it
- Humor is a learnable skill and we can all learn to use this important tool more effectively
 - Don't tell jokes,
 - Do tell stories and anecdotes

Straight talk and voice tone is important in the message being delivered.

Straight Talk

- Straight talk means that you communicate clearly.
 - Don't be afraid to deliver bad news
 - Talk from facts, not from emotion
 - But remember to consider cultural norms

Voice Tone

- Research has shown that your vocal tone (intonation, resonance and delivery) accounts for 84% of the believability you have when people can't see you
 - Be careful that your voice tone is the same as the message you are delivering
 - Try recording your voice to listen to yourself

There are generational differences which bring unique values, perspectives, and goals that should be considered.

Silent Generation	Baby Boom Generation	Generation X	Millennial Generation
65yrs+ Born before 1945	46-64yrs Born 1946-1964	28-45 yrs Born 1965-1981	8-27 yrs Born 1982-2001?

Silent	Boomers	Gen Xers	Millennial
<ul style="list-style-type: none"> Compliant Sought middle path Consensus driven Dedication Keep it together <p>Goal: To work together to keep things going</p>	<ul style="list-style-type: none"> Personal growth Sense of Mission Issue driven Ambition Change the World <p>Goal: To put their stamp on things.</p>	<ul style="list-style-type: none"> Independence Practical Results driven Adaptive Irreverent <p>Goal: To "just do it" and maintain independence.</p>	<ul style="list-style-type: none"> Optimistic Civic minded Group driven Ready to work Work together <p>Goal: To find meaningful work and create a life that has value.</p>

Individual work styles must also be considered in teaming and communications

CHALLENGERS

- Challenge team actions
- Question assumptions
- Force thinking
- Can be nitpickers
- May protect the old order

COLLABORATORS

- Foster working together
- Goal-oriented
- Ready to serve
- Keep team on track
- Bend, change, join in

COMMUNICATORS

- Great listeners
- Give and take
- Encourage discussion
- Pass data and ideas
- Convinces others

CONTRIBUTORS

- Do detailed work
- Collect data
- Works to schedule
- Source of ideas and facts
- Develops solution options



So what have we learned ...

We understand the teaming landscape

We are aware of the remote employee issues

We are aware of some of the management issues

We have a number of recommendations related to:

- Team Building and Facilitation
- Project Management
- Change Management
- Education
- Human Resources
- Running effective meetings
- And, cultural and other differences

Thanks for joining me in this discussion



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- **Minnesota Futurists**

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