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Declaration of Authorship

I declare that all material in this assessment is my own work except where there is clear acknowledgement and appropriate reference to the work of others.

I fully understand that the unacknowledged inclusion of another person's writings or ideas or works in this work may be considered plagiarism and that, should a formal investigation process confirms the allegation, I would be subject to the penalties associated with plagiarism, as per GISMA Business School, University of Applied Sciences' regulations for academic misconduct.

Signed: Carl Jhon D. Odicta
Date: 06.27.2025

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# I.   Team Manager – Who Am I?

Name: Carl Jhon Odicta
Company: Liquid Assets
Position: Transformation Manager
Reporting to: Executive Management
Age: 28
Nationality: Philippines
Location: Germany

I am Carl, the Transformation Manager for Liquid Assets (LA). LA has made several acquisitions for the past 10 years and with it, we envision a progressive and fast-paced future for the company that will require more optimized operations, therefore, I will be leading this team consisting of 10 members, each representing their country of operation, so that we will all be united under one brand, we will call "The Entity".

I.i.   Competencies

Behavioral Competency – DISC Profile

Source: https://www.crystalknows.com/
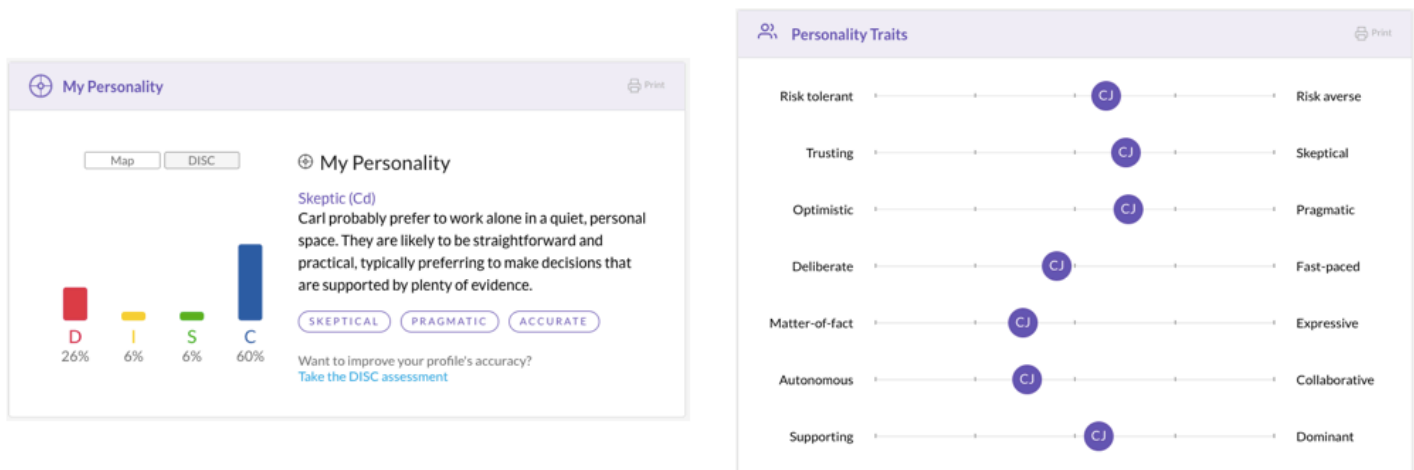
Figure 1. DISC Profile

Disc personality test is an excellent tool to Define the behavioral profiles of individuals, and in understanding strengths and weaknesses (Beedu G.K, 2021).

My DISC profile is reflective on how I plan to manage and communicate with the team.
- Skeptical – Evidence-based decision making.
- Straightforward – Concerns will be communicated straight to the point and directly to whomever is concerned.
- Practical – Focus on achievable and realistic goals.
- Can work alone but prefer to work together with the team.

Technical Competency

Leadership	☆☆☆☆☆
Finance	☆☆☆☆☆
Operations	☆☆☆☆
Sales	☆☆☆☆
Information Technology	☆☆☆☆
Project Management	☆☆☆

Figure 2. Technical Rating

Figure 2 shows a self-assessment of my technical skills based on my work experience and qualifications. My primary skills are on leadership and finance. I have advanced knowledge in operations, sales, and information technology, and experience in project management

I.ii. Leadership Style

Management – Theory X and Theory Y are contrasting ideologies about human motivation and how these assumptions affect how we manage people (Minaar, 2023). Based on my personality from (I.i.), I lean more towards Theory X due to my preference with structure and reason, however, as a leader for several years, I understood that micromanagement is more bad than good, this is why control for this team will only be in the form of KPIs.

Behavioral Integrity – The team will always strive to meet the targets we set. What we commit, we deliver. This is true to all aspects of the company.

Bounded rationality – All decisions will be backed by data or evidence and we plan for worst case scenarios.

Assertiveness –I will give clear and direct instructions, constructive criticisms, and will exercise active listening.

II.   Preparation - The Virtual Team

As the team is composed of people from the different countries of operation, by definition is a virtual team (Ferrazzi K., 2014).

II.i. Team Overview

Purpose: The team, is created to unite LA's operations and its several acquisitions - in North America, South America, Africa, Europe, Asia, and Australia - under one common brand called "The Axis".

Scope: Global integration and alignment of business units across all of LA's operations including IT systems, culture, and communication to improve efficiency, have global support, and higher sales.

Objectives:
- Brand Integration of several acquisitions.
- Create standardized processes and manage transition of various operations.
- Create and optimize IT systems for branding, products, clients, and administration.
- Improve sales in Latin America and Asian Territories such as India, China, and Australia.
- Grow markets in Mexico, Brazil, India, Mainland China, Hong Kong, and Australia.

Requirements:
- Team must not exceed the headcount of 10.
- Team representing as many geographies as possible to show team fairness and balance.
- Team must consist of people with IT skills, project management background, sales/business development, and all must have above average communication skills.

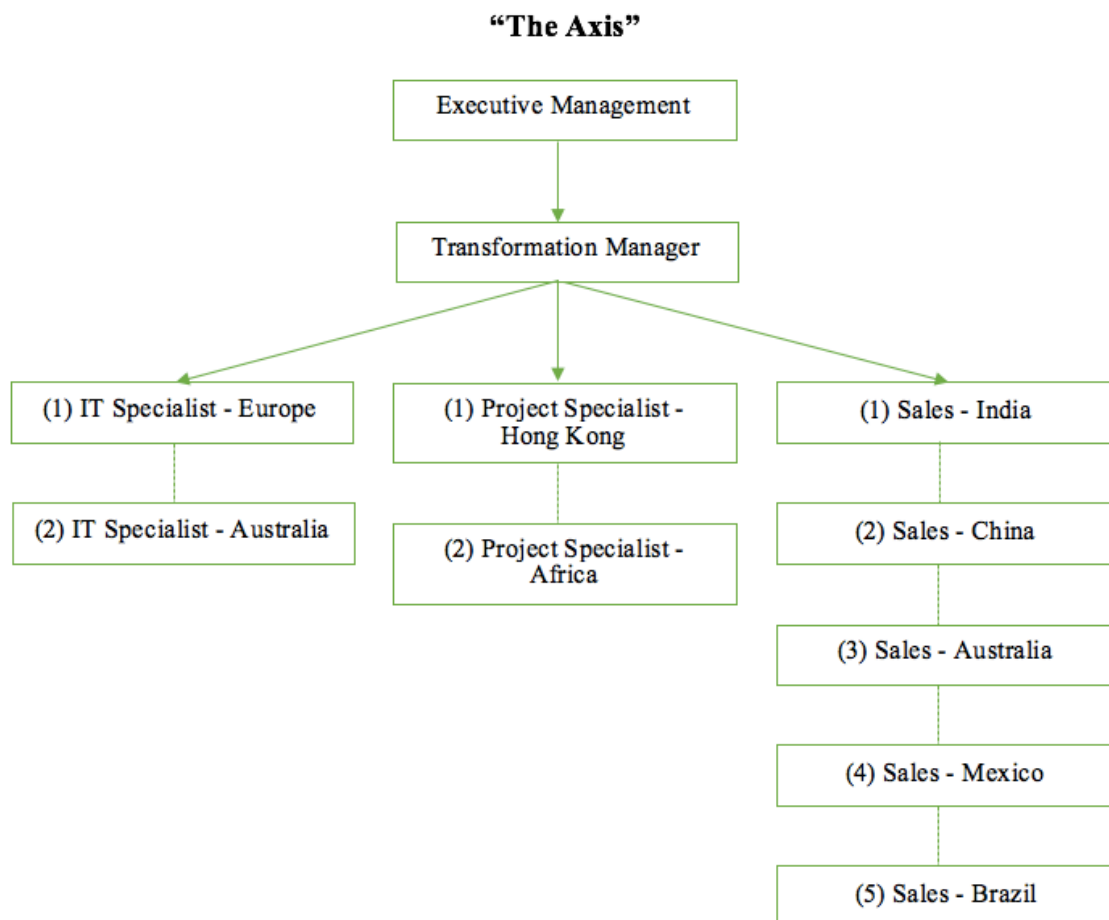### II.ii. Team Composition

"The Axis"

Figure 3. Organizational Chart

"The Axis" will be led by myself as the Transformation Manager and I will be reporting to someone from the executive management. My Team will then be composed of nine members divided into three primary roles; IT, Projects, and Sales. Majority (5) will be doing sales from each of the identified growth markets. Two IT Specialists coming from Europe and Australia as these countries rank higher in technology skill compared to Hong Kong and Africa according to Coursera.org website (Hart, 2025). Two will be project specialists coming from Hong Kong and Africa so that we have representatives for each of the key operations. Lastly, above average communication skills is required for all members.

Things of note in this organizational tructure is that all members come from different countries, this could potentially be a detriment, however, I believe it is more important for each country of operations to have a representative so that they will have a voice within the team.

II.iii. Selection Process

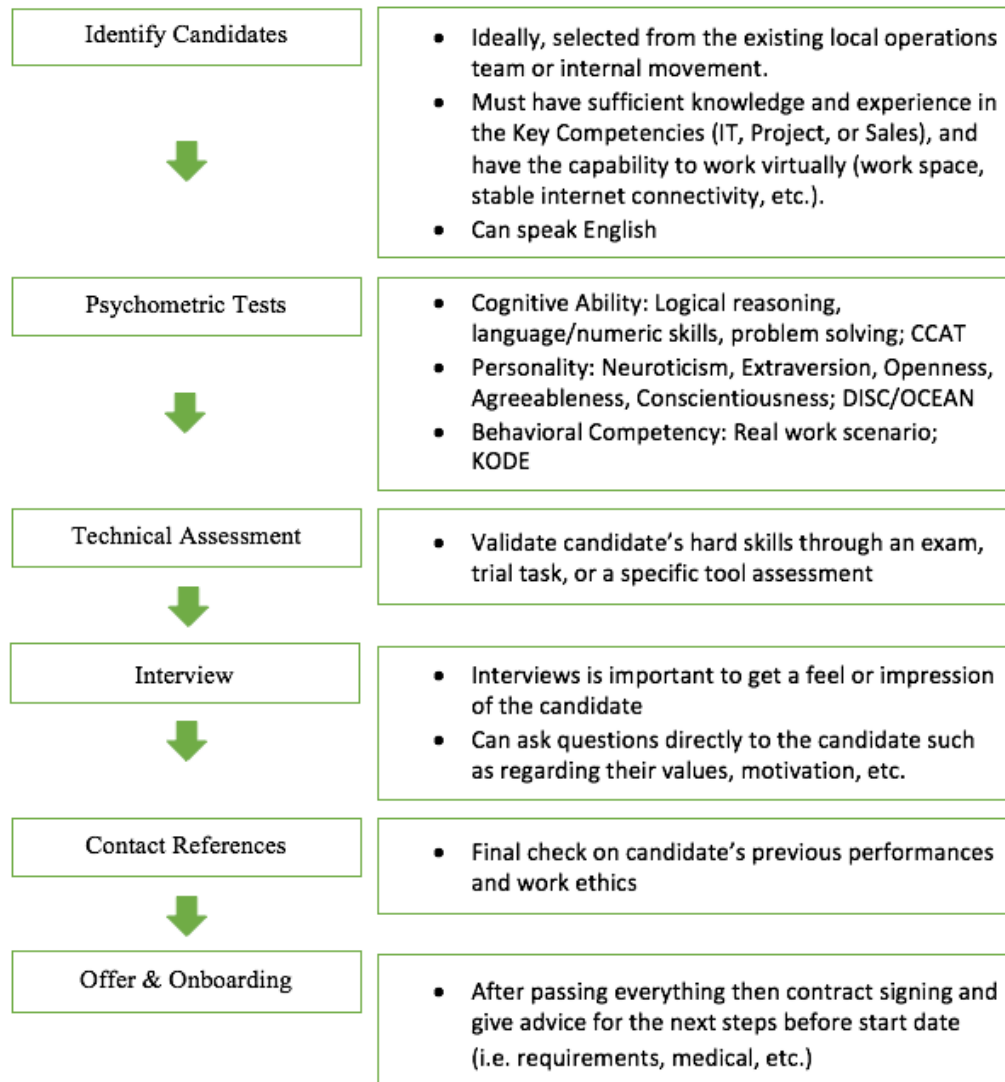| Identify Candidates	• Ideally, selected from the existing local operations team or internal movement. • Must have sufficient knowledge and experience in the Key Competencies (IT, Project, or Sales), and have the capability to work virtually (work space, stable internet connectivity, etc.). • Can speak English
Psychometric Tests	• Cognitive Ability: Logical reasoning, language/numeric skills, problem solving; CCAT • Personality: Neuroticism, Extraversion, Openness, Agreeableness, Conscientiousness; DISC/OCEAN • Behavioral Competency: Real work scenario; KODE
Technical Assessment	• Validate candidate's hard skills through an exam, trial task, or a specific tool assessment
Interview	• Interviews is important to get a feel or impression of the candidate • Can ask questions directly to the candidate such as regarding their values, motivation, etc.
Contact References	• Final check on candidate's previous performances and work ethics
Offer & Onboarding	• After passing everything then contract signing and give advice for the next steps before start date (i.e. requirements, medical, etc.)

Figure 4. Selection Process

In the selection process, I will select a current employee from each operation and offer them opportunity to join this international team. Candidates must have sufficient knowledge and experience, and can speak English. The candidates' cognitive ability and behavioral competency will then be evaluated, we will select someone with a positive attitude because they are easier to get along to. Technical Skills will then be tested by giving them sample scenarios or skills assessment. The top three scorers will be interviewed by me so I could get to know them better like their values and motivation, then the one with the highest score will be cross-checked with their references. If all is good then we can provide a job offer (Sharma A., 2023).

II.iv. Team Roles

Transformation Manager	• In-charge of managing the team members and performance • Create business strategies and initiatives through analysis and data • Monitor and report progress and KPIs • Manage relationships with all stakeholders
IT Specialist	• Install, maintain, support, and troubleshoot IT infrastructure • Ensure data security and compliance with data privacy • Assist with data-related tasks
Project Specialist	• Assist in creating project plan • Track team progress • Project documentation and reports
Sales and Business Development	• Leads generation • Negotiations • Build and maintain customer relationships

Table 1. Team Roles

II.v. Technologies

Communication – MS Teams will be used for video conferencing, group, and direct messaging, MS Outlook for Emails, and Sharepoint for document sharing and collaboration.

Project Management – Jira will be used for project management including importing project details, assigning tasks, and scheduling project deliverables and sprints.

Reporting –Power BI will be used for reporting and dashboarding. Access will be approved by IT personnel in-charge.

CRM – Salesforce CRM is used to establish, maintain, and improve customer relationships. (Visave, H., 2021)

Support Systems – IT support is available 24/7. You can create a ticket at servicedesk or send them an email.

II.vi. Communication Protocol

By nature of a virtual team, team communication can be quite challenging. Here are some details and rules to be followed when we communicate with others in the team.

Communication Tools:
- MS Outlook – Emails
- MS Teams – Direct Messages (company email), Group Chat ("The Entity"), Voice Calls and Virtual Meetings
- Jira – Project progress
- Github – Knowledge Sharing
- Successfactors – Feedback

Communication Policy:
- Direct Communication – When voicing concerns, communicate it clearly and in a concise manner. Everyone is allowed to talk directly to the person of concern.
- Inclusivity – We are a diverse group, and we listen from every point of view.
- Transparency – Relevant information, decisions, updates, and challenges is accessible and is shared to all team members to make informed decisions and build trust.
- Professionalism – We encourage the use of formal language during meetings as well as when we communicate with other members of the team

Availability Expectations: Team working hours will be from 09:00–18:00 CET, Monday to Friday.

Response Time: Within the next 24 hours. If you want to get a faster response, you may send it through the MS team group chat.

II.vii. Team Manifesto

"The Axis"

Unifying Liquid Assets' global operations and acquisitions under one brand to improve efficiency, support, and sales.

We promote respect, collaboration, equality, and cultural diversity.

Clear and Proactive! In here, everyone is a Leader.

We deliver value in all we do.

We resolve conflicts through constructive criticism and building trust

We value knowledge and make strategic decisions

Success means a unified system and branding

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Figure 5. Team Manifesto

III.   Launch – Managing Team Environment

The team leader is responsible in improving the team's level of productivity. One of the ways to do it is through effective team management tools such as performance assessment, goal setting, and creating a positive work environment (Shaikh A., 2021).

III.i. Ground Rules

Internal - Within the Team
- Respectfulness – Exercise active listening regardless of role or seniority.
- Response time – Respond to emails and messages within 24 hours. Else, you can set your MS teams status so others would know your availability.
- Meeting Etiquette – Attend all scheduled meetings on time. Cameras must be on. Be proactive and mentally present during meetings.
- Documentation – Important actions and decisions should be documented; either by sending an email to me with the details, creating a SOP document, record meetings and creating MoM.

- Professionalism – Use appropriate language and tone when communicating. Deliver on commitments and take accountability. And, provide constructive feedback.
- Work-Life Balance – Respect everyone's schedule and personal lives. Work should only be done during working hours (except for emergencies).

External – Outside the Team
- Represent the Team Professionally – Use official email signatures, branding, and company templates.
- Confidentiality – Don't share sensitive information externally. Follow data privacy guidelines.
- Escalation – Customer concerns should be forwarded to appropriate level.

III.ii. Challenges and Mitigation

Challenges	Mitigation Strategy
Time-Zone Differences	• Coordinate and communicate timings with the team especially for meetings and activities. • Use online tools to help you track time-zones and plan accordingly, like World Time Body or MS Outlook scheduling assistant.
Technology Issues	• IT Support team is available 24/7. • Have back-up device or UPS to minimize disruptions due to power outage. • Internet allowance will be provided to ensure connectivity.
Communication Barriers	• Communication Protocols (Section II.vi.) • English language proficiency
Biases	• Be aware of your own biases. • Always practice inclusivity and fairness.
Motivation	• Virtual team building activities • Recognition and Rewards
Psychological Needs	• Mental Health Awareness and Management Programs • Fitness Programs (Gym subscriptions, yoga sessions
Diversity	• We do not tolerate discrimination of any kind • We promote inclusivity. Everyone in this team has a voice regardless of role, gender, age, race, or nationality
Operational Distance	• Standardized Tools (Section II.iv.) • Clear roles and tasks • Follow SOPs and proper documentation
Socio-emotional Distance	• Consistent communication and regular updates • Regular virtual meetings • Promote shared company values

Table 2. Challenges and Mitigation Strategy

III.iii. Team Culture

Dimension	Low-High	Description/Comments
Power Distance	Low	• Hierarchy is only for organizational structure • You are allowed to speak your concerns directly to anyone regardless of position.
Masculinity	Middle	• We promote work-life balance without sacrificing quality
Uncertainty Avoidance	High	• Despite this being a new company initiative, decisions are done strategically and backed with data.
Individualism	High	• We are task oriented and output-based. You are evaluated by your work alone. • Work-life balance is respected.
Long Term Orientation	High	• This team is essential for future strategy due to market potential and growth

Table 3. Team Culture
(based on Hofstede's International Dimensions of Culture)

IV.   Performance Management

Performance management refers to the process of planning, supervising, and improving the performance of the team. This involves identifying performance goals, measuring results, providing feedback, and development. Its main objective is to increase the productivity of individuals and therefore the organization (Faozen F. and Sandy S.R.O., 2024).

IV.i. Virtual Meetings

Meeting (Frequency)	Objective	Agenda	Duration (Min.) and Schedule
Daily	- Review daily progress - Challenges and Emergencies	- Welcome/Greetings - What did you do yesterday? - What will you do today? - Challenges or help needed - Other concerns	60
Weekly	- Review project sprints - Backlogs delivered and rescheduled - Challenges	- Welcome/Greetings - What backlogs were delivered - What backlogs were rescheduled - Challenges or help needed - Other Concerns	60 Replaces the daily meeting on Fridays
Monthly	- Review employee performance for the previous month - Employee concerns - Feedback	- Greetings - Check Employee KPI - Constructive Feedback - Reward achievement and discuss areas for improvement	30 One-on-one First week fo the month
Annual	- Project and employee performance review - Challenges and concerns	- Greetings/Welcome - Discuss annual team performance - Recognize and reward achievements - Team Strategy for the upcoming year	Can be done together with team-building activity
Ad-hoc	- Discuss a specific issue/concern		30-60

Table 4. Virtual Meetings

Tool – Virtual Meetings will be done using MS Teams.
Documentation – Virtual Meetings will be recorded and then stored in a shared location for team access. MoM will also be created for all virtual meetings.
Rules:
- Camera must be turned on
- Wear appropriate attire
- Minimize discussing things not relevant to the meeting agenda
- Use the "raise hand" reaction if you want to ask question or speak
- Practice active listening to whoever is speaking
- Meetings are recorded

IV.ii. KPIs and Success Metrics

KPI	Definition	Target
Team KPIs		
Integration Rate	Number of integration activities completed from the annual plan	1 Activity per month
Brand Adoption Rate	Number of acquisitions using the unified branding	Increasing 10% per month
Stakeholder Satisfaction	Stakeholder feedback (1-5) on the transition to "the Axis"	>4
Individual KPIs		
Task Completion	Number of tasks completed	>90%
Meeting Attendance	Meeting Attendance	>90%
Response Rate	Response time to important messages	<24hrs
Trainings	Number of trainings completed	2 per year

Table 5. Key Performance Indicators (KPIs)

Success Metrics:
1. Integrated Brand and Operations
2. Improved Sales
3. Market Growth

IV.iii. Feedback

Feedback should always be constructive in nature with the goal of inciting change rather than discouraging or being offensive. It Should always focus on the work done and not about the specific person. Here is a list of best practices on how to give feedback for virtual/remote teams by (Mercer S., 2020).
- Do it to everyone
- Always use video
- Give a heads-up
- Treat it the same way as you will in the office – minimize distractions and start-end on time
- Ask for feedback for yourself

V. Team Development – Culture and Growth

Team Development can either be cultural wherein the environment and social relations among team members is improving, and team development can also mean learning and knowledge. Both will improve the team's performance, retention, collaboration, trust, and morale (mckinsey.com, 2018).

V.i. Team Building Activities

An effective teambuilding can be conducted virtually, and does not necessarily need to be face-to face. It can promote high level of motivation, engagement and positive relationship among the members. It will also bring positive feelings and attitude to the participants, and can enhance their social and soft skills (Muniandy S. and Munohsamy T., 2021).

A virtual team building activity will be scheduled quarterly for 1-2 hours. This virtual call will be just for fun where the team will engage in virtual games, performances, raffles, and even show some "fun facts" about the team and the members. This is all to foster camaraderie among the team.

V.ii. Trainings

Here is a list of skills that are important in virtual teams, example of available trainings, and training provider.

Skills	Training or Seminar	Training Provider / Source
Virtual Communication	Virtual Communication (Cornell Course)	https://ecornell.cornell.edu/
Leadership	Leadership and Management Certificate Program	Wharton School, University of Pennsylvania
Data Literacy	Microsoft 365 Tools for Productivity	Microsoft
Finance	CFA Program	https://www.cfainstitute.org/
Operations	Six Sigma	International Association for Six Sigma Certification (IASSC)
Sales	Certified Professional Sales Person	National Association of Sales Professionals (NASP)
Project Management	PMP Certification Training	Project Management Institute

Table 6. Sample Trainings

Attending trainings are important for an individual's development. Team members are recommended to complete at least one training per year of their own choosing.

VI.   Closure

In the virtual team lifecycle, the final stage is called closure or 'dishandling'. This is where a virtual team conducts debriefing, recognition, and transitioning of the members from the current project/team to the next. For this assessment however, since this team is created for the long term strategic goals of LA, I will only be discussing on documentation and recognition.

VI.i. Documentation

Standard Operating Procedures (SOP) – A standardized step-by-step documentation on how to perform or complete a certain work or process (safety culture, 2025). SOPs will be created for all existing and new processes for operations, IT, and sales across the different acquisitions so that they will follow the same procedure and standard. This will improve the team's efficiency and quality of work, and can also be used as training material for the members. SOPs are essential for the overall integration of LA's systems and branding.

Minutes of the Meeting (MoM) - A document describing important details of the meeting. It should include a description of the meeting, list of attendees, start/end time, important decisions made, and the actions taken. Transcript and comments will not be included (Bendoff D., 2004). A MoM should be done by a team member for every important meeting. MoMs will be stored in a shared location so everyone in the team can access and get up to date if ever they missed a meeting.

Other Documents – Aside from those previously mentioned. Other documents can include; team manifesto, organizational structure, strategic roadmap, SLAs, training records, IT systems architecture, and user guides.

VI.ii. Recognition and Rewards

Acknowledging achievements, recognizing efforts, and rewarding wins is important in a team culture because it incentivizes hard work, give motivation, and increase retention for a team/team member (Hunter T., 2020).

This team will implement the following Recognition and Rewards System.

Recognition:
- All members who successfully completed a task/output within the week will be acknowledged during the weekly meeting.
- The employee having the best overall KPI for the month will receive a certificate of recognition as the "Employee of the Month", similarly with the "Employee of the Year" but in addition a short video message will be made by the team leader to mention and give thanks to that person's achievement
- Milestones will be recognized during meetings. I.e. Project Milestones, birthdays, and work anniversaries.

Rewards:
- Members seen with potential and positive results will be offered sponsorships in upskilling and certifications.
- Gift cards/monetary compensation will be rewarded to the "Employee of the Month" and a higher amount will be rewarded to the "Employee of the Year"
- % Annual salary increase will be calculated based on an employee's scorecard/KPI performance.
- Consistent delivery of exemplary results for a minimum of 1 year can result into candidacy for promotion.
- Rewards may also be given upon hitting specific targets identified by the executive management.

VII. Final Thoughts

I structured this assessment based on the virtual team lifecycle - preparation, launch, performance management, team development, and dishandling - because it is the primary role of the team leader to facilitate and guide the team through all these phases. In order to be a good team leader, you must have the required competencies, behavioral integrity, and assertiveness. More importantly, team success is very much dependent to its members having complimentary skillsets, a positive work environment, cultural sensitivity, and respect to each another. All remaining is to apply the techniques and tools in performance management and planning. At the end of the day, A virtual team is still a team, people who work together to achieve a similar goal. Today we are privileged that technology enables us to work easier with people from around the world allowing us to explore and meet new people and culture which are definitely a part of the experience.

Finally, applying all the learnings I obtained from this module, I am confident that Team Axis will be a success!

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