

M503 Behavioral Competencies in Virtual Teams

Build a Transformation Team for the "Axis"

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1. Introduction

As the appointed Transformation Manager for Liquid Assets (LA), I'm in charge of bringing together all our different businesses around the world. This pivotal project, which is called "the Axis" among the employees, aims to bring LA's processes, products, brand, and client management into one coherent global framework.

Additionally, my role involves not only coming up with the concept, hiring, and leading a top level virtual team that represents LA's global presence but also being most effective in the emerging markets of Latin America, Asia, and Australia. The hiring of such a team not only means the matching of individuals with technical and business skills but also the creation of a space that is inclusive and collaborative, that breaks through cultural barriers. By means of good communication protocols, psychometric tests, and real project management methods, I will assure that the Axis team is prepared to perform a smooth integration, which subsequently will enable LA to be on the sustainable global growth track.

1.1 Transformation Manager: Psychometric Test Results

In my new role as a Transformation Manager at Liquid Assets (LA), I recently took psychometric tests through Crystal Knows which I found out some insights about my work personality.

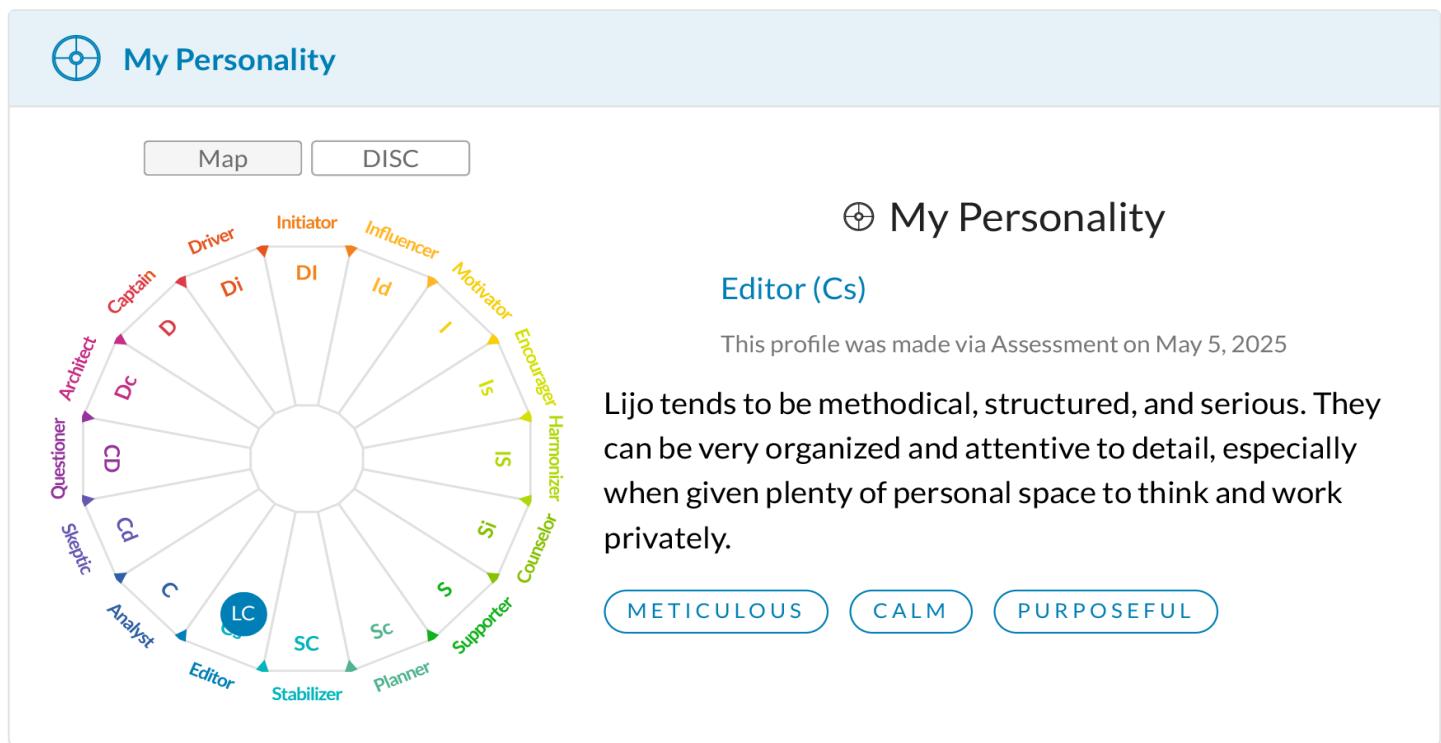


Figure-a: Disc personality test – www.crystalknows.com



Figure-b: Strength identification test – www.crystalknows.com

Assessment of my personality characteristics has indicated that I am risk averse, skeptical and pragmatic.

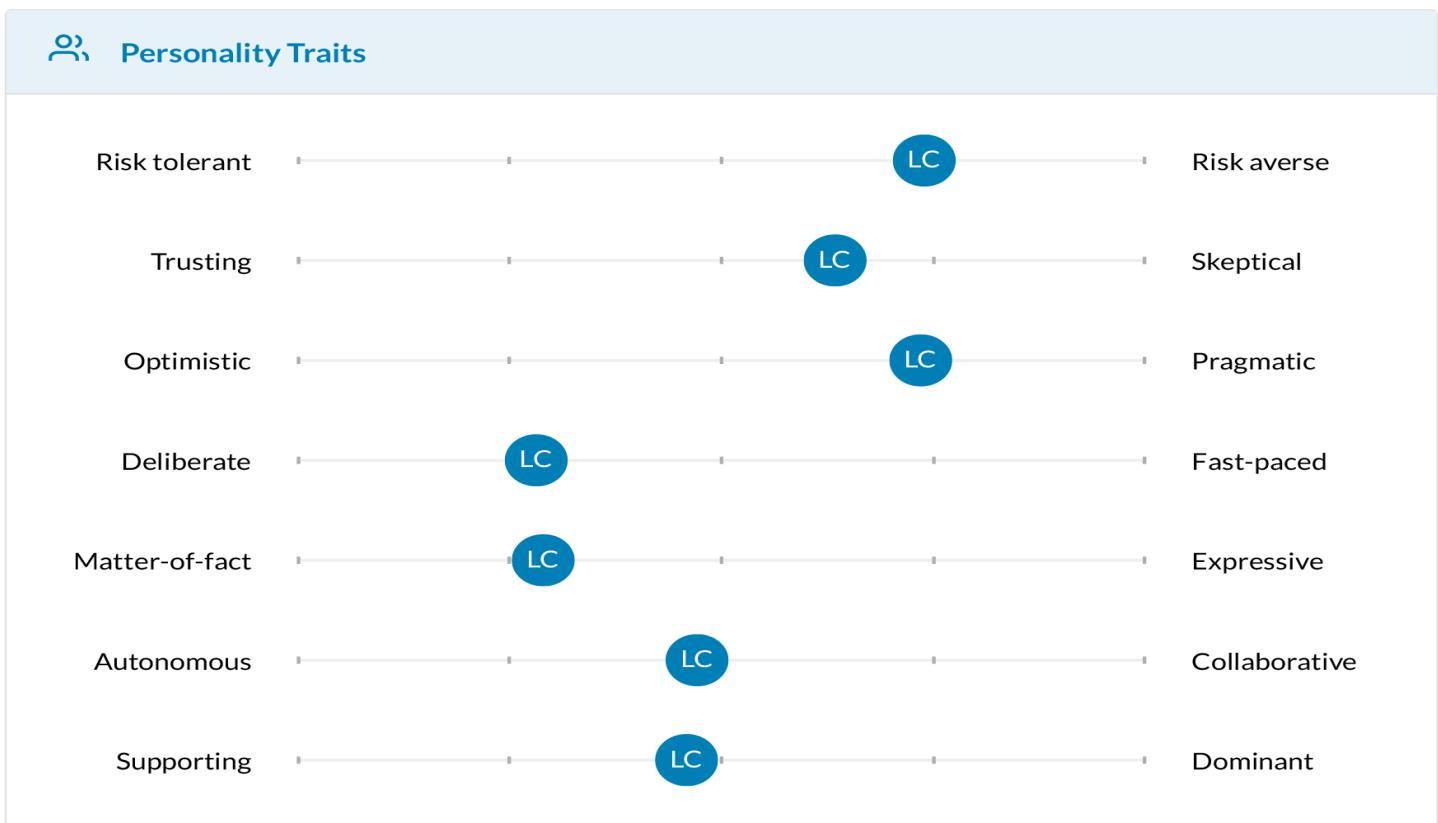


Figure-c: Personality traits test – www.crystalknows.com

The BIG 5 assessments revealed my levels of agreeableness, conscientiousness, openness and emotional stability.

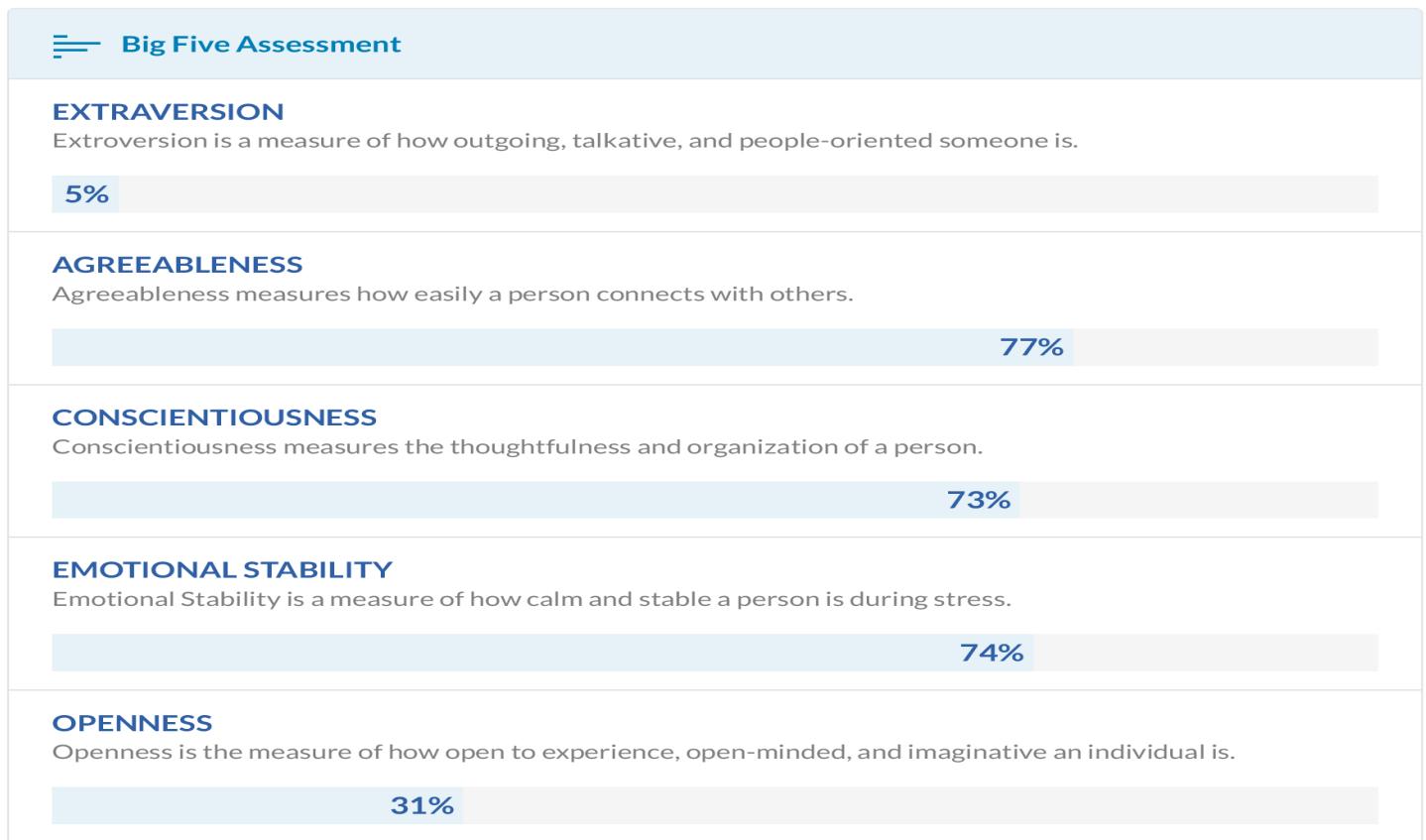


Figure-d: Big 5 assessment – www.crystalknows.com

1.2 Role and Challenges

My leadership style is most generally characterized by a perfect combination of transformational leadership, that is an energizing and motivating approach for the team members, and situational leadership, which means changing my approach according to the individual or the culture's unique needs.

Virtual teams are becoming more and more significant in implementing modern business strategies, especially for multinational companies like L.A. that operate across multiple continents and time zones. A collaboration in virtual form gives companies an opportunity to tap into the talent pool specialized in different fields without being limited geographically, reduce travel costs, and be more flexible in the constantly changing global market.

Still, the creation and leading of virtual teams that work efficiently introduce a number of problems. Gibson and Gibbs (2006) through their research revealed that virtual teams are more exposed to the risk of misunderstanding, they may be less able to align their goals, and establishing a trust relationship is more difficult compared with traditional local teams. Cultural misunderstandings can arise easily, if the very delicate levels of communication style, hierarchy, and social norms are not kept in mind, then conflicts or disengagement will occur.

Different time zones can really affect our ability to schedule meetings and make quick decisions. Further, inconsistent or inadequate communication tools can result in information silos, missed deadlines, and reduced team cohesion. Virtual teams which have not made an intentional endeavor in relationship building so that they may develop the interpersonal connections required to foster collaboration and morale, may not be able to fully realize the benefits of virtual work.

Nevertheless, organizations that give priority to communication, set proper communication protocols, implement cultural awareness programs, and conduct trust-building trainings are still able to get the uninterrupted potential of virtual teams. It is very important to build a common team identity because, if there is no such identity, members may see themselves as isolated contributors rather than integral parts of a cohesive group. High-performing virtual teams are those that establish clear roles, use reliable communication channels, and proactively manage conflicts and cultural differences.

1.3 Project Life Cycle

For the Axis initiative, a project aimed at unifying Liquid Assets' local operations and rebranding into a single entity, the programme life cycle has to be carefully crafted to deal with the issues in virtual teams. The following five phases will guide this effort:

- Initiation: Set clear goals for the project, find people representing different regions who will be involved. Essential alignment at this point is very important for confirming the commitment and understanding of the project.
- Planning: Build the team structure, announce roles, create a detailed project plan with objectives, establish communication and highlight potential risks.
- Execution: Coordinate efforts of the various regions, handle dependencies, and ensure that all tasks are fulfilled within the deadline. Regular communication and vigorous participation will be the required proper functioning of the team.
- Monitoring & Controlling: Keep on following project performance compared to KPIs, make changes to plan if required, and take care of problems like miscommunication or unexpected barriers.
- Closing: Assess project results, record issues and how they were tackled, appreciate the team, and make sure there is no trouble during the change

A disciplined adherence to these phases will enable LA to successfully integrate diverse operations, align processes, and create a consistent global brand.

2. Preparation of a Virtual Team

2.1 How to Design the Team

2.1.1 Team Composition – Forming the Organizational Structure

The Axis project team shall constitute ten purposively selected members that represent the key functions and geographic areas. Based on my ISTJ personality type I have chosen the members of the team who bring flexibility and interpersonal skills.

The organizational chart suggested is as follows:

- Transformation Manager: Overall coordination and execution.
- IT Manager (India): Overseeing systems integration, ensuring alignment with global platforms while respecting local requirements.
- IT Specialist (China): Providing technical support and guidance for region-specific IT nuances.
- Project Manager (Australia): Managing schedules, deliverables, and resource allocation.
- Business Development Manager (Brazil): Aligning regional sales efforts with global strategies and exploring new market opportunities.
- Sales Representative (Mexico): Developing and executing local sales plans.
- Finance Analyst (Hong Kong): Ensuring financial processes, compliance, and reporting are unified.
- Communications Specialist (UK): Managing internal communications, change messaging, and public relations.
- HR/Training Manager (USA): Leading talent integration, onboarding, and employee engagement programs.
- Diversity Advisor (South Africa): Promoting an inclusive work environment and developing cultural awareness initiatives.

Organizational Chart

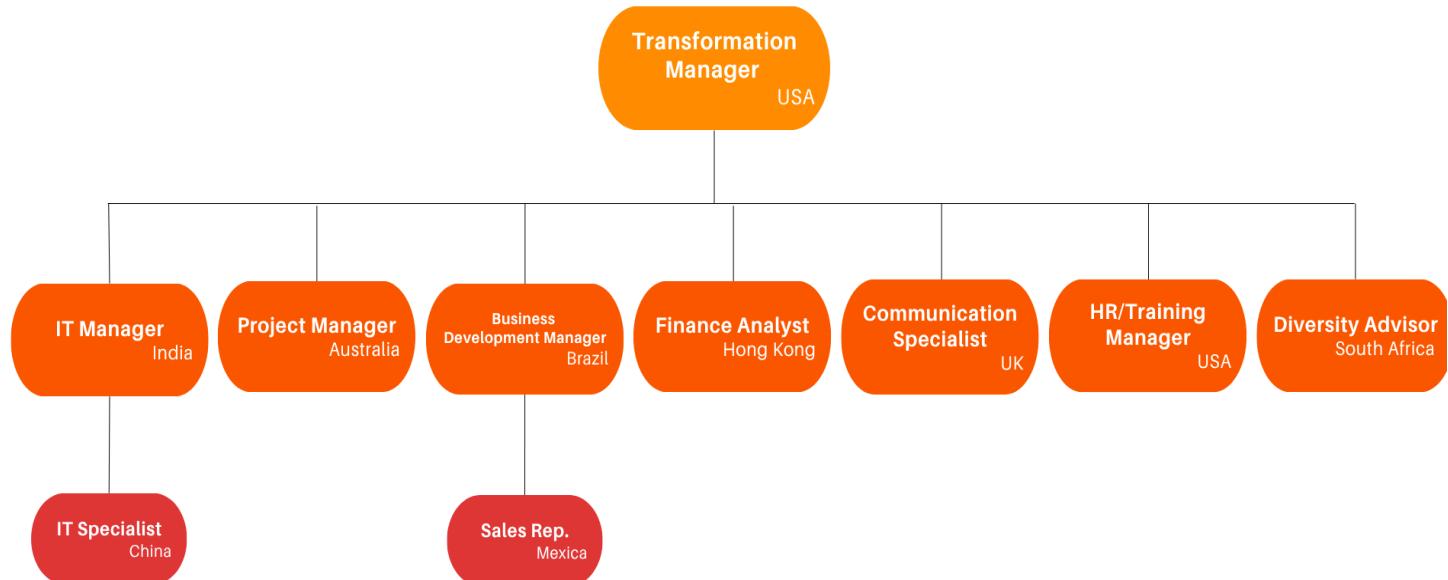


Figure-e: Organizational chart

2.1.2 Selection Process – Using Psychometric Assessments

For an effective virtual team, a rigorous selection process is definitely necessary. Job applicants will be subjected to two primary psychological tests. The SHL Occupational Personality Questionnaire (OPQ32) is a tool that measures behavioral traits and the degree of one's suitability for a particular job. The Crystal Knows Disc Assessment analyses one's communication style and how one reacts to problems, people, pace, and rules.

The selection process will focus on these core competencies:

1. Sourcing: Use internal communication channels to find candidates from each region and area of expertise.
2. Initial Screening: Go through resumes and applications to check for qualifications and experience.
3. Psychometric Testing: Carry out survey-based personality tests such as Crystal knows to get to know characters of candidate's personality traits, communicator's styles, and problem-solving skills besides teamwork.
4. Interviews: Hold planned structured behavioral interviews aimed at evaluating the candidate's skills by employing the STAR approach.
5. Panel Interview: If necessary, for those on the shortlist, the panel interview step can be added. In that case, they will meet with key stakeholders from different regions both to check if they fit culturally and to get input on the matter from various points of view.
6. Final Selection: After a thorough examination of certificates and experience, psychometric tests, the interview, and the geographical representation, choose the most suitable candidate.

2.2 Team Manifesto

The Axis Team Manifesto is the team's agreement on how they will collaborate. It expresses our common values, needs, and agreements, thus forming a psychological contract that is the basis of the team relationship. The principles that the manifesto will contain are as follows:

- Respect and Empathy: Be conscious of and accept that the world is a place full of various cultures and understanding others opinion thoroughly .
- Open Communication: Create a situation that is safe from a psychological point of view, where people feel that they can give their ideas, questions, and concerns without any fear of being judged.
- Accountability: Be trustworthy, perform your duties without delays, and always consider the impact of your actions.
- Continuous Learning: Encourage the transfer of skills and the development of interest, make use of both individual and collective skills.
- Positive Conflict Resolution: Use a constructive approach towards disagreements by focussing on issues.

2.3 Communication Protocols

2.3.1 Communication Policy

Efficient communication which is the foundation of success in virtual teamwork. To implement a clear communication policy, the Axis team will likely:

- Language: English will be the primary language used for work but it is very important that we communicate in simple and clear language to avoid any confusion.

- Response Time: The team members should respond to emails and direct messages within 24 hours on weekdays.
- Meeting Documentation: The minutes have been recorded for each meeting and stored in a central repository.
- Feedback Mechanisms: Regular one on one and team check ins will give the chance for feedback, clarification and support.
- Inclusivity: Meetings will be spread evenly across regions on a rotating basis.
- Confidentiality: The team members must use secure communication channels and comply with data protection protocols.

These protocols aim to foster clarity, trust, and accountability.

2.4 Managing Virtual Meetings

2.4.1 Agenda

Virtual meetings will be carefully planned to respect participants' time and maintain engagement.

A standard meeting agenda will include:

1. Review of previous minutes and matters.
2. A report of work in progress from all regional team members.
3. Identification and discussion of barriers and risks.
4. Allocation of new tasks and confirmation of duties.
5. Open discussion period for team feedback or ideas.
6. Summary of action taken ad follow-up.

Monthly “all-hands” meetings will maintain focus on shared goals and recognise progress, while weekly core team meetings will keep the daily activities aligned.

2.5 Objectives

The Axis initiative aims to achieve the following objectives:

- Establish unified sales and branding processes: Make sure the message, pricing, and customer experience are maintained globally.
- Integrate client administration: Consolidate customer relationship management by using one single, standardized system.
- Standardize product offerings: Ensure services and products are consistent in different regions in order to prevent duplication and confusion.
- Align financial and operational reporting: Develop the same templates, KPIs, and dashboards for performance tracking.
- Foster a shared culture: Set up common values and practices that bind the team together.

2.6 Infrastructure

A robust technological foundation is essential for virtual collaboration. The project will employ:

- Video conferencing on Microsoft Teams and Zoom.
- Slack for real time messaging, updates, and clarifications.
- Confluence for knowledge management, document editing and sharing best practices.
- SharePoint/OneDrive for secure document storage and version control.
- Jira for task management, progress and transparency.
- Doodle for scheduling meetings .

All tools will be integrated with single sign-on (SSO) to simplify access and strengthen security.

3. Risks – Challenges

3.1 Risks & Mitigations

Operating internationaly and different cultures always introduces risks. Key risks for the Axis project, along with their mitigation strategies, include:

- Time Zone Conflicts: Changing meeting times regularly and using asynchronous communication platforms will allow people to participate comfortably.
- Language Barriers: Offering communication tips and tools like training in clear business English .
- Technology Failures: Having backup platforms and ensuring that local teams have reliable internet and the necessary help .
- Resistance to Change: Local stakeholders will be involved and the advantages will clearly be communicated during change management.
- Data Security: Following all international data protection regulations including GDPR and SOC2 will make sure that exclusive information is secure

These proactive measures will reduce disruptions and build trust.

3.2 Challenges & Solutions

Several persistent challenges require ongoing attention:

- Building Trust Virtually: Intentional practices such as online team-building sessions, informal gatherings, and one on one inquiries will set up bonds and deepen connections.
- Performance Monitoring: Developing clear KPIs, accessible dashboards, and conducting regular performance reviews will help the team to be concentrated and responsible.
- Maintaining Motivation: Acknowledging achievements, publicly announcing milestones, and offering incentives that are relevant will make the morale stay at the top even in a virtual setup.
- Decision-Making Delays: Allowing regional leads with the power that has been delegated within the agreed limits to make immediate decisions will not only eliminate the places where the flow of work is blocked but also make the project more flexible.

By addressing these challenges directly, the team can operate effectively despite physical separation.

4. Behavioral Competencies

Success in a multicultural virtual environment hinges on the right behavioral competencies among team members. The Axis team will emphasize:

- Adaptability: Flexibility in response to transferring priorities, technologies, or cultural expectancies.
- Communication: Ability to express ideas in reality, pay attention actively, and adapt messaging for numerous audiences.
- Collaboration: Collaborating across cultures, acknowledging contributions and seeking consense.
- Problem-Solving: Taking initiative to identify issues and solving problems.
- Initiative: Going past assigned tasks to anitcipate needs and seize opportunities.
- Cultural Intelligence: Incorporating the cultural differences into running practices. As Earley & Ang (2003) assert, cultural intelligence is a essential determinant of success in international teams.

These competencies will be reinforced through onboarding and ongoing development programs.

5. Necessities in Project Management

5.1 Training and Creativity

Effective training will be central to preparing the team for virtual collaboration. Key elements of the Axis team's training plan include:

- Technical Onboarding: Getting to know the collaboration platforms, document management systems and task tracking tools
- Cultural Awareness Workshops: Interactive sessions designed to deepen understanding of cultural dimensions (Hofstede, 1980) and building empathy.
- Creative Thinking Techniques: Incorporating methods such as design thinking (Brown, 2008) and brainstorming to promote innovative solutions.
- Continuous Learning: Offering selected Harvard Manage Mentor modules covering topics like leading virtual teams, change management, and global strategy.

Ideally, creative thinking will be promoted through cross discipline ideas, innovation challenge and the opportunity to personalize solutions for local needs

5.2 Leadership and Management

As Team Lead, my leadership approach will focus on:

- Transformational Leadership: Leading the team with a clear vision, encouraging motivation and acknowledging the efforts to build trust.
- Task and People Balance: Referencing the Blake & Mouton Managerial Grid (1964), combining task oriented and people oriented behaviors ensures both project objectives and team well-being are prioritized.
- Situational Leadership: Using Hersey & Blanchard's (1969) model to change leadership style based on each team member's experience and capability, from directive to supportive behaviors.
- Regular Performance Reviews: Creating an opportunity to have a honest conversation about the achievements and challenges as well as developmental support for those who want to advance further.

6. Outcomes & Conclusions

Through the participation of a talented, widely dispersed, select team with varied points of view as well as complementary skill sets, the Axis program will change Liquid Assets decentralized structure to a coordinated, responsive, and powerful global voice.

Expected outcomes include:

- Streamlined Processes: Consistent processes will increase efficiency and reduce repetitive work.
- Consistent Brand Identity: A cohesive branding strategy will strengthen LA's market presence and customer trust.
- Improved Sales Performance: Coordinated sales approaches and shared market intelligence will enhance the sales pipeline
- Engaged Workforce: Boosting morale and decreasing turnover thanks to inclusive practices, cultural awareness and valuing success.
- Enhanced Growth Potential: A connected, innovative organization will be better positioned to identify and seize opportunities in growing markets.

The realization of the Axis project will depend on steadfast dedication to open dialogue, anticipatory risk handling, and following the common principles set out in the Team Manifesto. By establishing trust , drawing on individual capabilities and promoting cultural awareness, we will overcome the difficulties of collaborating online to deliver sustainable success for Liquid Assets.

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