High Performance Teams
Organizing Your Virtual Team For Success

MMA Program

Session Three
Dr. Shawna O'Grady
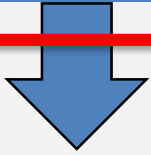
Smith | Queen's University
SCHOOL OF BUSINESS

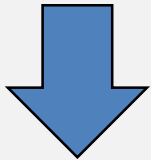# Four Steps to Building an Effective Virtual Team

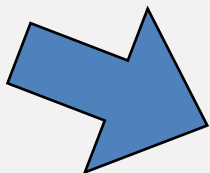**Step One: Develop Respect For the Strengths of All Team Members**

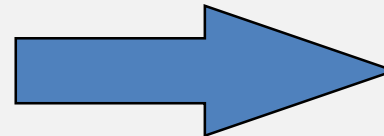**Step Two: Organize the Team: Clarify Roles and Processes**

Step Three: Create a Team Alignment Document

Step Four: Hold Each Other Accountable: Communicate and Debrief

SYNERGY

SUCCESS

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Overview

1:15 – 1:45	Teams vs. Virtual Teams
1:45 – 1:50	BREAK
1:50 – 2:40	Virtual Team Best Practices – Meetings and Roles
2:40 – 2:50	BREAK
2:50 – 3:20	Virtual Team Best Practices – Assignment Process
3:20 – 3:25	BREAK
3:25 – 3:45	Virtual Team Best Practices – Technology and Relationships

What is a Team?

A small set of people coming together, committed to a common purpose and working approach and holding each other accountable.

Virtual Teams – Two Characteristics

- Physically dispersed

- Interact primarily through electronic means

People underestimate how much information they get from chance encounters, which never happen in any mode but face-to-face.

Source: Leigh L. Thompson, *Making the Team A Guide For Managers*, New York: Pearson, 2018..

Why is Face-to-Face So Important?

1. Easier so it's more likely to occur.

2. 93% of the meaning of messages comes from nonverbals.

3. People form initial impressions from it.

4. Nonverbal behaviors are key to building rapport.

5. The degree of trust and rapport established on a team determines how quickly the team can move on its work (efficiency) and whether it achieves its goals (effectiveness)

Source: Leigh L. Thompson, *Making the Team A Guide For Managers*, New York: Pearson, 2018, p. 303.

What is the most important characteristic for a virtual team member?

Most Important Characteristic of a Virtual Team Member

Source: Leigh L. Thompson, *Making the Team A Guide For Managers*, New York: Pearson, 2018.

Virtual Team Members – 3 Important Characteristics

- Trust
    - Competence
    - Reliability
    - Caring
    - Integrity

- Attentiveness
    - Encourage participation
    - Dealing with conflict
    - Recognizing team members

- Communication
    - Tone in verbal and written
    - Look for meaning

Source: Randy Conley, "3 Characteristics of Successful Virtual Teams", September 25, 2014.

Virtual Teams – Benefits

- Tap into the best talent globally

- Reduces status differences

- Equalization of participation

- Team members can work in parallel

- Lowers costs

- Increases team member flexibility

- Create opportunities

Virtual Teams – Challenges

- Building trust is more difficult virtually
- Disinhibition and the negativity effect
- Information suppression
- Greater likelihood for conflict; less sharing of information
- Increased time to make decisions
- Task performance and decision quality

Source: Leigh L. Thompson, *Making the Team A Guide For Managers*, New York: Pearson, 2018.

The biggest mistake that organizations make with virtual teams is not getting team members together to bond, and to align expectations around roles, operating norms and team practices and procedures. If that doesn't happen at the beginning, you run into major problems down the line.

Making Virtual Teams Successful

- Invest in specific strategies to build and maintain trust

- Make sure the team is aligned around clear roles and processes

- Establish a set of unique norms and protocols

- Understand the enhanced role of the Chair and Lead

- Use a combination of technologies to enhance decision-making and cohesion

- Ensure the team is trained in conflict management and has ongoing coaching

Best Practices

Virtual Team Meetings

Virtual Team Meeting Best Practices

- Determine whether you need to meet at all

- Begin and end on time

- Plan all your meeting communication

  – Incorporate extra time for silence

  – Pay attention to non-verbal responses

  – Call team members by name

  – Agree on a phrase to exit disagreements

- Agenda for each meeting sent in advance *in writing* clarifying preparation expectations

- Add in "technological" questions to your debrief"

Two Types Meetings Required

1. Administrative Meeting (1 hour)

2. Working Session (4 - 6 hours total) – two or three meetings

- Held separately via videoconference

- Same time/same day

- Chair and Scribe for each meeting (rotation monthly)

Administrative Meeting – Main Tasks

- Emotional check-in

- Debrief the *assignments* you just submitted

- Align around Assignment Plans

- Resolve any issues you need to

- Organize and plan ahead

Working Session – Main Tasks

- To discuss/make decisions about assignments

- The Chair leads the team through the Agenda

- The Lead is responsible for leading a discussion around the content of an assignment

- Chair debriefs the *meeting process* at the end

- Choose the technology for the meeting that matches the level of collaboration required

Best Practices – Role of Chair

- Prepares agenda with team input

- Coordinates with Assignment Leads prior to team meetings to set agenda and determine team member preparation items

- Manages participation

- Acts as timekeeper

- Ensures adherence to norms (along with other team members)

- Seeks team alignment around decisions

- Facilitates debriefs of meetings, assignments, processes and roles

- Summarizes action items with Scribe

- Checks in with team members during the month

- Rotates monthly

Best Practices – Role of Scribe

- Records action items during team meetings

- Coordinates with the Chair and lists action items verbally to team at end of meeting

- Sends the written list to team within 24 hours (electronically)

- Records lessons learned from debriefs (meeting and assignment)

- Updates the "Lessons Learned" files so that any team member can access them electronically

- Rotates monthly

Team Decision

Team Decision – Selecting Your 1st Chair

- In making your decision, consider:

  – Who has "Chairing" experience within a virtual or other environment?

  – Who has the skills to effectively lead the team in this important role? (Clear communicator, good connector/willing to reach out to others, organizer, timekeeper, receives feedback well, ability to move others to decision, inclusive, knows how to cut off a discussion, tactful, etc.)

  – Who is willing to be the first Chair for the month of May?

Team Decision – Selecting Your 1st Scribe

- In making your decision, consider:

  - Who can commit to this role for the month of May?

  - Usually the first Scribe becomes the next Chair so, consider placing another individual in this role with strong Chairing skills/experience.

Please take 10 minutes to select your first Chair and your first Scribe for the month of May.

Best Practices – Role of Scheduler

- Coordinates with the Chair to set up a two-hour meeting during opening session to:

    - Set up your bi-weekly meeting schedule

    - Assign Leads and Seconds for all upcoming assignments

    - Produce a team assignment summary document with the weights, due dates and Leads/Seconds

    - Agree on technology and operating protocols

    - Agree on any project management tools the team will use

    - Complete the Skills Inventory

- Summarizes the team's decisions around assignments, schedules, protocols, tools, inventories, etc. in one location accessible for all team members

- Updates the documents on a regular basis and communicates the information to the team regularly

Team Decision – Selecting Your Scheduler

- In making your decision, consider someone with the following skills:

    - Organization skills

    - Technological skills

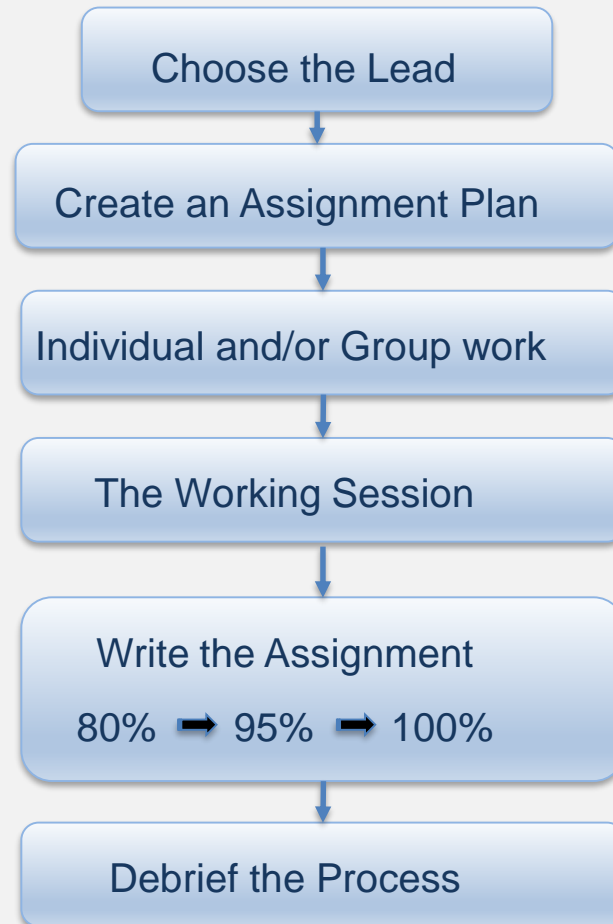   - Project management skills

    - Interpersonal skills

Assignments

Assignment Process Flow

Choose the Lead

↓

Create an Assignment Plan

↓

Individual and/or Group work

↓

The Working Session

↓

Write the Assignment

80% ➡ 95% ➡ 100%

↓

Debrief the Process

Assignment Best Practices

- Lead and Second roles scheduled well in advance

- Assignment plans for each team assignment

- Team sets the direction of the assignment

- Lead produces first draft (Second as a resource)

- Team provides feedback to Lead at 95% level

- Internal timelines are never missed

Team Exercise

Situation

Benny and Jared were the Lead and Second on the first team assignment. Benny prepared an assignment plan, gained alignment from the team around the plan and the timeline for completing it. After the team's working session to discuss the assignment and set the direction, Benny prepared a first draft of the assignment and sent it to Jared for review. Jared was very impressed with Benny's draft and thought it captured all of the team's main points. Jared provided some feedback to Benny to improve the draft to 95% complete. Benny incorporated Jared's feedback and sent it to the rest of the team for final input.

Astrid, one of the team's members, sent a note to the team chat stating, "Benny, I would like to work on this to improve the assignment. I have quite a bit of free time and think I could re-write it and do much better. Would you mind?"

Two other team members, Anik and Sing Chee responded, "I'm fine with it" and "Whatever the team thinks" respectively. The sixth member, Jay commented "Astrid, if you have time, go for it."

How would your team handle this?

Please take 10 minutes to discuss how you would like to handle this type of situation on your team.

How Would Your Team Handle This?

☐ A.   Trust Benny and Jared to fulfill their roles as Lead and Second. That's what a team is about.

☐ B.   Let Astrid take over from Benny. Better get used to it.

☐ C.   Try to press Sing Chee for her vote. She should stand for something after all. This might help make it clearer who stands on each side of this issue.

☐ D.   Wait this thing out....no point dealing with anything until we have to. Just sit on it. Something will crack.

☐ E.   Let Benny decide on his own. He's the Lead.

☐ F.   Other

Best Practices – Role of Lead*

- Takes the "Lead" in reviewing assignment requirements

- Completes an assignment plan

- Sets up time on an Administrative Meeting agenda (with the Chair) to gain alignment to the assignment plan

- Leads the team through the working session discussion of the assignment/project he/she is leading

- Checks in with team members prior to/during the working session

- Produces a first draft of the assignment (80%)

- Coordinates with Second to produce a 95% complete assignment

- Sends to team for input and incorporates where possible

- Sends 100% completed assignment to Smith and to Team

- Someone who "wants to learn" *versus* an expert already

*See the best practices document for a complete list

Best Practices – Role of Second*

- May take notes during the team meeting to organize the team's discussion in preparation for writing the draft

- May help to clarify the team's working session discussion and help the Lead structure the assignment

- Acts as a resource for the Lead as the Lead prepares the draft of the assignment/project

- Reviews 80% draft prepared by the Lead and provides feedback to improve it to 95% (this may require more than one feedback loop)

- Plays devil's advocate, provides a check and balance role, edits the draft from a content perspective

- Is often someone with experience or someone who has expertise in a subject area

*See the best practices document for a complete list
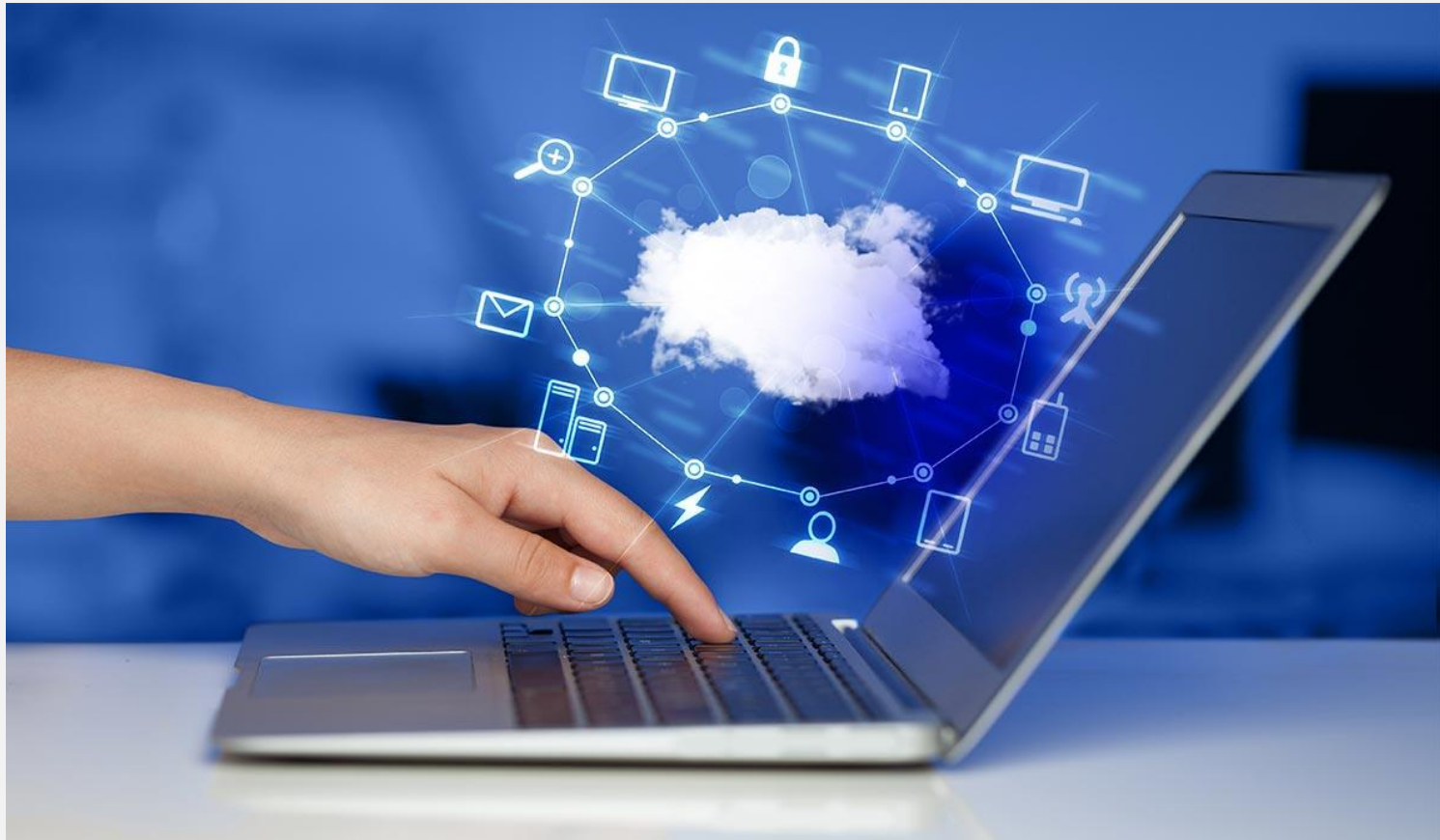
Technology

Virtual Team Best Practices – Technology

- Consider leaner communication media

- Agree on video, mute and chat protocols (i.e. video and audio "on" when speaking; no chat while using videoconferencing)

  - With more than six people, mute unless you're the person talking

- Ensure team members are comfortable with the technology

- Develop a collaboration strategy to ensure the technology chosen works

- Conduct a "technological debrief"

- Block out background noise (i.e. Krisp)

Virtual Team Best Practices – Technology

- Minimize email whenever possible

  – Schedule a conversation when collaborating on a project (i.e. Lead and Second)

  – Use quick chats or IM where possible

  – Email only the individuals necessary

  – Clearly identify the subject of the message in all email

- Re-read all communication before you send to ensure clarity in content and tone

- Use cloud-based file-sharing – find an easy way for all team members to access team docs remotely such as Google Drive or Dropbox etc.

Virtual Team Best Practices – Technology

- Provide each other with your boundaries re: work/home life balance (i.e. Pat prefers email; Karim IM and not after 10 pm; how often do you expect team members to check messages?)

- Adopt professional and positive e-mail and watercooler etiquette

- Ensure all draft versions are named in the same way across all team members (i.e. .draft80, .draft95, .draftfinal)
  - Send all team documents to a team portal
  - Ensure all document revisions are handled in the same way
  - Ensure all documents are named in a common way

When to Use Face-to-Face Meetings

- To initially build relationships and collaborations

- For complex problems

- To accurately understand each other's work

- To learn more about innovative ideas

- To renew trust on the team

- To resolve conflicts

Source: Leigh L. Thompson, *Making the Team A Guide For Managers*, New York: Pearson, 2018, p. 301.

When Not to Use Face-to-Face Meetings

- For brainstorming ideas

- For work individuals can do

- Any time people aren't prepared, have nothing important to discuss, or don't have a key decision to make

- For updates or anything informational– do this online

- For urgent messages

- For simple communication

Relationships

Relationship Best Practices

- FTF time during *and between* "opening" and "electives" sessions

- Choose technologies that reinforce rapport and cohesiveness

- Allow for spontaneous (sort of) connections

- Pair up across locations

- Establish a "Virtual Watercooler" – 4 C's

- Put all action items and work assignments in writing

- Attach your pictures to all communications

- Consider apps to help continue to build your culture (donut.com)

- Schedule a "virtual coffee break" once a week

- Make "care calls"

- Do a virtual tour

Relationship Best Practices (continued...)

- No multitasking

- Cold calling by Chair and Lead acceptable

- Celebrate everything you can

Reaching Consensus

- High performance teams rarely voted

- If a vote is necessary, high performance teams require a higher percentage of agreement than a simple majority
(e.g. five or six of seven *versus* four of seven)

Relationship Best Practices (continued…)

Conflict Management

- High performance teams deal openly, honestly and quickly with team conflicts

- High performance teams use coaching resources

Confidentiality

- High performance teams keep issues brought up in the team within the team and their Coach

Thank You!

For more information,

please feel free to contact me at:

Dr. Shawna O'Grady

Phone: 1.613.533.2328

E-mail: shawna.ogrady@queensu.ca

Website: www.teammatters.ca

 @shawna_ogrady