



Managing Global/Virtual Account Teams

Driving top performance in teams separated by time, space and culture

This Project Management Matters includes techniques and approaches that will help you to manage your global/virtual account teams in a way that ensures consistent campaign execution, margin enhancement and client satisfaction.

It covers five important aspects of global/virtual teams:

- 1. What's the Difference: The challenges that come with global vs. traditional teams*
- 2. On/Off/Broken: Ensuring the right task/technology fit*
- 3. Rules of the Road: Establishing global team processes and ground rules*
- 4. Parts and the Whole: Ensuring virtual team and leader effectiveness*
- 5. Here vs. There: Avoiding problems due to cultural disconnects*

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1. What's the Difference: Challenges that Come with Global vs. Traditional Teams

There are three types of teams that come into play on agency initiatives, and in most global organizations, account teams can fall into one or more of these categories:

- Traditional teams are made up of groups working together in the same location. Regular face-to-face meetings are a key characteristic of these teams.
- Virtual teams are made up of members in multiple locations who rarely or never meet face-to-face.
- Global teams are virtual AND multicultural.

Global/Virtual teams vs. Traditional Teams are differentiated along three dimensions:

- *Complexity:* Traditional teams tend to be more homogenous with more opportunities for "same time/same place" interactions. Global/virtual teams tend to be more heterogeneous, and they can come with additional challenges associated with multiple time zones, technology differences, different cultures and multiple languages. In general, the more complex the team, the more "over-communication" needs to be emphasized in your communication protocols.
- *Communication:* Traditional teams allow more opportunity for face-to-face interaction (including all the non-verbals, body language, etc., that go with it). They also allow more informal interaction (e.g., one-to-one and small groups) and true collaboration

that comes with the give-and-take of real-time communication. Global/virtual teams rely mostly on electronic communication (e.g., e-mail, texting, data repositories, Web meetings, etc.). The predominance of e-mail as a communication medium means a time lag between sender and receiver along with more threaded discussions.

- *Interaction Flexibility:* Traditional teams can easily combine various classes of interaction (e.g., one-to-one, one-to-some, one-to-all, some-some, etc.). With global/virtual teams, different classes are not easily combined in a single setting. As an example, think about the “meeting before the meeting” where people interact just before the formal meeting. Think about all the ways that communication occurs before, during and after a traditional (face-to-face) team meeting, for example:
 - Agreements made informally while waiting for the meeting to begin
 - Opportunities to enhance buy-in from key stakeholders
 - Discussion of concerns and risks that might be too sensitive to surface with the entire group.

Taken together, these three differentiators result in some very predictable (and potentially costly) global/virtual team risks:

- More invalid assumptions made (and untested) about intent, needs and expectations
- Greater technology dependence results in delays, miscommunication and conflict
- Conflict and “disconnects” between members take longer to surface and resolve
- Hand-offs between members are more prone to error
- Developing trust takes longer due to less personal interaction
- Fewer opportunities to do what makes teams successful (e.g., collaboration, problem solving, brainstorming).

What follows are a number of ways to address these challenges in a way that will enhance the performance of your global/virtual teams.

Stop and Think... Assumptions

Assumptions are a necessary part of every project. They cause trouble when they are not surfaced or tested until after they become problems.

The Assumption Challenge: Think about something a colleague needs from you. List assumptions you have about the need or request, and use the following categories to identify and think about how you might test those assumptions.

Assumption Categories	Your Assumptions	How Will You Test Them?
1. People (e.g., availability, willingness, ability, commitment, etc.)		
2. Material Resources (e.g., hardware, equipment, tools, technology, etc.)		
3. Information (e.g., accuracy, availability, currency, format, etc.)		
4. Time (e.g., schedule, time zone, deadlines, etc.)		
5. Money (e.g., budget, planned vs. actual, exchange rate, timing of release, etc.)		

2. On/Off/Broken: Ensuring the Right Task/Technology Fit

The “Time-Place” Continuum is what causes global/virtual teams to depend so heavily on technology. Whether they are synchronous (same time) or asynchronous (different time), the “different place” part of the equation is where the big challenge lies.

When planning communication for your global/virtual team, think about where you need to be in terms of level of interaction. Consider the Virtual Interaction Continuum:

Level of Interaction Required		
Low	Moderate	High
<ul style="list-style-type: none"> Information Sharing/ Confirmation 	<ul style="list-style-type: none"> Status meetings/ Brainstorming 	<ul style="list-style-type: none"> Collaboration/Negotiation
<ul style="list-style-type: none"> Voice mail e-mail 	<ul style="list-style-type: none"> Electronic bulletin board/chat rooms Video conference Audio conference 	<ul style="list-style-type: none"> Electronic meeting system with audio/video White boards with audio/video link

Regardless of which type of technology you choose, be sure to address the questions associated with these technology considerations:

- Available at all participating locations?
- Reliable? (what’s the track record?)
- Supportable (who will you call for help?)
- Easy to use?

Rules of the Road: Establishing Global Team Processes and Ground Rules

With team members from many locations and cultures, it stands to reason that they may have different ways of getting things done. This can present a challenge if the different approaches don't mesh well together. For any global/virtual team, it's a good idea to establish norms for:

- Work/project management
- Communication (formal vs. informal)
- Interaction/meeting management
- Hand-off management.

A key consideration in work/project management occurs at the very beginning. When initiating projects, agreement should be reached on key, fundamental aspects to ensure the project's success:

- How project goals will be developed and communicated
- Who will be involved
- How the plan, schedule and budget will be determined
- How hand-offs will be managed
- Applicable project metrics
- How communication will occur
- How risks will be managed

And to provide some further context to this discussion, in addressing "How communication will occur", consider the best use of formal vs. informal communication methods; i.e. e-mail vs. telephone, and group vs. one-on-ones. Formal communication may be used to:

- Share official information in a targeted or global manner
- Create an audit trail or historical record
- Confirm agreements made informally.

While you might use informal communication to:

- Gather input
- Seek agreement
- Test understanding
- Share information selectively
- Build relationships
- Test messages prior to formal communication.

Regardless of the approach and technology you use for communication, remember the importance of these four communication steps: hear, understand, interpret and respond. For all methods, don't jump from "hear" to "respond" without making sure you "understand".

How much time should you invest in setting up your ground rules? The answer depends on how much time you're losing due to their absence. Take this quick survey to decide the value of your investment in developing "rules of the road."

Cause of time lost	Minutes lost per week
Poorly worded e-mails (where clarification must be requested)	
Time waiting for a response from someone in a remote location	
Technology problems (e.g., couldn't download the attachment, Web site down, etc.)	
They misunderstood what you wanted, so you needed to repeat the cycle	
Stuck in an unproductive meeting	
Total minutes lost in a typical week	
Estimated time lost in a typical year (Total above X 50 weeks)	

Beyond these challenges, virtual meetings are a big source of wasted time on virtual teams. Typical meeting killers include no goals, roles and processes too long, too many topics, long-winded participants, over and under-contributors, they deteriorate into complaint sessions, technology malfunctions, etc. The list is endless.

Remember these “virtual meeting musts”

- Clear goal/purpose and agenda (distributed ahead of time)
- Specific start and stop times
- Clear roles (e.g., owner, participant, facilitator, timekeeper, action scribe, etc.)
- Parking lot to collect important (but off-topic) items
- Action list developed along the way; distributed immediately after.

Hand-off risks are one of the biggest causes of problems on any project, but even more so on global/virtual teams. What causes failed hand-offs?

- Unclear/incomplete requirements
- Language disconnects
- Assumptions about effort/time required
- Relationship/cultural issues
- Unexpected approvals required.

Setting the stage for successful hand-offs can be done by setting up some simple “rules of the road” at the beginning of the project. Sample ground rules for hand-off management:

- Both supplier and customer in each transaction are responsible:
 - Supplier is responsible for executing the hand-off
 - Customer is responsible for communicating requirements
- Supplier confirms hand-off with customer.

After you commit stay in touch on longer assignments; and provide status updates, deliver on time, and always follow-up to make sure they got it.

3. *Parts and the Whole: Ensuring Virtual Team and Leader Effectiveness*

The assumption with any project team is that, if it's run properly, the whole will be greater than the sum of the parts, resulting in synergy. Even traditional teams, with the built-in advantage of many more opportunities for face-to-face interaction, have difficulties with team effectiveness. Add all of the additional barriers that come with global/virtual teams, and challenges can sometimes seem insurmountable.

The following characteristics of effective teams are relevant for any team, but they are particularly important when it comes to global/virtual teams:

- *Common purpose/shared goals*: it's critical to get everyone pointed in the same direction.
- *Involvement leads to commitment*: the essence of all power lies in your ability to get others to engage. At every opportunity, involve others in any and every aspect of the project.
- *Unity doesn't require unanimity*: right from the beginning, make sure everyone understands that "you won't always get your way". Sometimes, you just need to move past the issue in order to reach the finish line.
- *Conflict is a tool, not a weapon*: on effective teams, conflict is okay. People are encouraged to challenge ideas, with the idea of coming up with better ideas and solutions. Their goal is to determine "what's right" rather than "who's right".
- *Have fun*: the best teams take their work very seriously; but they don't take themselves seriously. They look for opportunities to get together informally, and get to know each other. These positive relationships tend to pay off when things aren't going well, and a little extra support is needed from others on the team.
- *Clear understanding/management of dependencies*: make sure everyone knows how their part fits into the whole; and who's dependent on whom. They make sure people are talking to each other so that hand-offs between stakeholders are successful.

Relationship building on virtual teams can be quite challenging. With limited opportunities to interact face-to-face, you need to be creative and flexible. Here are a few ways to help global/virtual team members to get to know each other:

- Encourage teams to share brief bios
- Be sensitive to cultural differences: more on that below
- Create a strong team (and sub-team) identity
- Make friends (e.g., connect off-line): Use the phone (rather than e-mail) at every opportunity
- Look for opportunities to socialize (e.g., virtual parties, etc.)
- Build trust and rapport: always make good on commitments, and look for areas of common interest

- Use surveys for temperature taking: Periodic “how’s it going?” surveys will give you a heads-up on potential team issues
- Inter-team competitions (combined with “virtual parties”) using:
 - Local facts, trivia, etc.
 - True/False questions about team members.

4. Here vs. There: Avoiding problems Due to Cultural Disconnects

The cost of cultural disconnects can be high. Cultural misunderstandings can be a significant cause for delays and cost over-runs. More significantly, the inability to understand and leverage cultural differences is a major reason for failed global projects

Why does cultural acumen matter? First, appreciation for different (and seemingly inappropriate) customs/ norms helps to head off needless conflict. Second, being “open to” rather than “tolerant of” different ways of doing things promotes more powerful team performance. Finally, understanding of cultural differences can be a competitive advantage.

Your ability to learn about and work with cultural differences as they exist on your team (or in your organization), can have a significant impact on the value of the outcomes you achieve. Equally important, it will contribute to a workforce that is more understanding and tolerant of differences, and thus more willing to make things work when the chips are down. Make sure you understand some very real differences in a number of areas:

- *Time orientation:* Variations in how people understand and use time; everything from perceptions of punctuality to the meaning of “hard deadlines.” In one culture a 10 AM meeting starts at exactly 10 AM, while in another, it will start “around” 10 AM.
- *The context of communication:* The way people communicate with each other – some are very direct and to the point, while others are very indirect and rely heavily on context, history and social standing. In low-context cultures, it’s acceptable (and expected) that we get right down to business, while in high-context cultures, time is spent on relationship building prior to discussing the business at hand.
- *Individualism vs. collectivism:* The extent to which the welfare of the individual or that of the group is more valued in a society. While individual accomplishment is celebrated in some cultures, it is considered inappropriate in others where credit is almost always shared with all involved.
- *Differences in value orientation or “cultural baggage”, learned beliefs, biases, etc.:* The collection of all the values, beliefs, concepts, and behaviors that you learned as a child that will have a great effect on the way you see the world. Your cultural baggage is unique and will most certainly differ from that carried by members of your host culture. While “cultural norms” give us an idea as to how many or most people from a particular culture will behave, there are infinite behavioral variations that will be encountered on any given project.

Cultural Tips

- *Build your cultural knowledge:* Build a network of people (and resources) with multi-cultural expertise. Learn the do's and don'ts for each culture you're working with.
- *Test messages for cultural clarity:* Before sending important messages, have someone you trust look it over to ensure cultural congruity.
- *Treat people as individuals:* Just as you wouldn't want someone to paint everyone in your culture "with a broom," you should do your best to treat everyone as unique, while respecting cultural norms.
- *Withhold assumptions:* Try to look at each situation and person through an international rather than a local lens.
- *Listen actively:* Even in single-culture interactions, it often takes a couple rounds of back-and-forth to ensure understanding. Expect this to be the case in multicultural situations. Ask questions and test for understanding.

About the Author

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