CREATING AND LEADING A
WILDLY SUCCESSFUL VIRTUAL TEAM

insync training

WHITEPAPER BY JENNIFER HOFMANN
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ABOUT THE AUTHOR – JENNIFER HOFMANN
INTRODUCTION

This paper is a case study based on a highly successful virtual team: ours! The team here at InSync Training grew organically and created its own best practices as we grew because it was the right thing to do for our customers. Our team is proud of the way we work – and that we have the most functional working relationships most of us have ever experienced. I am proud to share this story with you.

InSync Training launched as a virtual company in 2000. Back then, the concept of virtual teams (or even just working virtually) was not as accepted or expected as it is today. As a small group of training professionals all working from home offices scattered throughout the country, we did our best to hide the fact that we were not co-located in a more traditional office space.

Clearly, times have changed. Organizations much larger than InSync Training (at the time of this writing we have a team of 60 facilitators, producers, instructional designers, and training support staff) are not only allowing but encouraging individuals and teams to work virtually.
On the surface, the reasons are fairly obvious. Economic factors make the costs associated with building and maintaining additional office space prohibitive. The realities of a global workforce allow us to include the best talent in the world on our team, but don't necessarily allow us to move that talent to a centralized location.

InSync is a wonderful success because of our virtual team. Our team is high-functioning, tightly knit, and consistently performs at a high level. This paper will share our own internal practices for creating, leading, and maintaining our virtual team. It will include real examples of how a virtual team works for us which I hope you can adapt to your own very personal organizational situation.

The fact is, a virtual team can be very effective if the correct conditions are created and maintained. Creating the correct conditions is simply a matter of bringing together the right personalities, making sure they have the correct tools, and then leading that team effectively.

This paper is divided into the following sections:

1. Benefits and challenges
2. Forming a virtual team
3. Enabling a virtual team
4. Protecting a virtual team
5. Leading a virtual team
6. Maintaining and rewarding a virtual team

It’s important to keep in mind that the techniques and anecdotes I share are unique to InSync Training. We are a small training provider/training support services team, supporting clients around the world on a 24 hour schedule. Because every organization is unique, you’ll need to consider the specific advice I share with respect to your circumstances and then adapt and evolve the techniques so you can create the best virtual team for your organization.
I’ve been leading a virtual team for the last 15 years. During the same 15 years our industry, live online learning, has also evolved from a trendy learning technology to an established component of the learning mix. It was actually a great pairing; a new model of working growing up next to a new model of teaching and learning.

As the world has changed to become more global and more interdependent, with more and more online or virtual components, the question has become: What constitutes a “real relationship?” I think that this is the real issue behind some organizations’ hesitancy in implementing virtual teams. Can we truly form real relationships and functional teams in a solely virtual environment?

Obviously I believe the answer to that question is “yes,” and InSync is a prime example of a highly successful virtual team with strong relationships, even between people who have never met face-to-face.

Some benefits of virtual teams that we’ve discovered include:

- Virtual teams not only can but should include the best talent. The very nature of our socially networked environment means we are not limited by geography, time zone, or culture. Qualified team members are located everywhere.

- Members of the virtual team can start to develop work/life balance. Not constrained by a traditional “9 to 5” workday, members of the virtual team can create schedules that allow for family commitments and personal pursuits. This flexibility takes time to master and team members must learn when it is appropriate to “turn off their workday.”

- For the organization, a virtual team can result in lower costs, including office space, furniture, and other fixed operating costs associated with a centralized location.

- There is a lot of flexibility with a virtual team format. We have members of our team who work from 9 AM to 2 PM in a particular time zone and end their workday 20 minutes before their children return from school.
It is more difficult to work on and manage a virtual team during times of uncommon change and uncertainty. When an organization is stable, it seems less stressful to manage the small bumps in the road that tend to come along with any project. When an organization is experiencing change in the form of a reorganization, software implementation, or process change, it can seem more difficult to work virtually. Team members may feel left out of the loop, and managers may be concerned that virtual workers aren’t managing the change appropriately. This challenge can be managed with a strong communication plan that addresses issues such as the personal impact of the change on the virtual team or on the individual worker.

Knowing the benefits and challenges associated with working on a virtual team allows us to plan to take advantage of the benefits and mitigate the challenges.

SOME COMMON CHALLENGES FACED BY A VIRTUAL TEAM INCLUDE:

- **Connections are hard to find.** It can be disconcerting not to have body language and eye contact with other team members directly contributing to an output for which you have responsibility.

- **Learning to adapt to work in a virtual team can be difficult.** Virtual workers often either:
  - stay constantly connected to work even during scheduled time off, resulting in burnout and wiping out any potential gains in work/life balance, or
  - are constantly distracted by people and tasks that are unique to their personal environments.

- **Managing the time zones between team members can be a challenge.** How does someone living in Los Angeles collaborate comfortably with someone living in London? Sometimes it seems that you’re always waking up early or working after dinner to accommodate virtual team collaboration.

- **The silence can be deafening.** It can be hard for a new team member to integrate into a virtual team. How does one get to know your colleagues when you can’t socialize over lunch, or drop by a desk for a quick introduction? We can’t forget the importance of typical “water cooler” conversation when forming and maintaining a virtual team.
FORMING A VIRTUAL TEAM

It’s important to remember that not all virtual teams are constructed in the same way. The construction of your team will depend largely on your corporate culture. Perhaps certain team members will need to be located in a centralized location, while other team members can work remotely. It could be a function of role, customers serviced, or amount of hours worked during the week. Perhaps everyone will need to come to the office on a regular basis, or the entire team will work without ever requiring traditional face-to-face interactions.

CREATE A PROFILE

Over the years we’ve organically created a profile of a great virtual team member based on our own successes.

We look for someone who is self-motivated and proactive. To a certain extent, a member of our team needs to be a risk taker. They can’t wait for direction when trying to support a client at three o’clock in the morning!

When people think of working virtually, they often think it is a very unstructured environment. In fact the opposite is true. It takes a lot of structure and self-discipline to be successful as a virtual worker. And, most importantly, that structure needs to be self-imposed. Those who wait for the structure and direction to come from someone else are the people who don’t succeed on our team.
CLARIFY JOB ROLES AND INTERDEPENDENCIES

Since team members can’t tap their manager on the shoulder when they have a question, it’s important to clarify responsibilities very early on. This is more than a job description and more than competencies; a virtual team member needs to understand what expectations are on a daily basis including job deliverables, communication, and level of virtual interaction with the rest of the team. Of course, it’s nearly impossible to communicate everything early on. If your virtual culture works then job roles and team member interdependencies will come out naturally.

USE YOUR EXISTING TEAM TO IDENTIFY AND INTERVIEW POSSIBLE TALENT

I learned early on that the best people to select new team members are the existing team members. The virtual team needs to be tightly connected, and a new person joining the team who has already met future colleagues can go a long way towards creating strong relationships. Also, I expect team members to troubleshoot problems and arrive at solutions with their peers. It’s important that a level of trust exists between new and existing members as the team grows. A good technique is to ensure that the entire interview process takes place in a virtual environment, even if the candidate is located near the residence of the interviewer. Individuals often have a different face-to-face persona than an online persona, so it’s important to know that online personality upfront.

ENCOURAGE DIVERSITY

We do look for diversity on our virtual team, but not necessarily in the traditional sense of the word. We look for diversity in skills, language, experience, and culture. People often think it’s strange that we don’t use webcams during our interview process. We have found that not using live video allows us to focus on what a candidate is bringing to the table virtually and not what the candidate may look like. While it’s true video may help us form stronger connections later on, I find it to be a distraction in the interview process.
Enabling a virtual team is critical to the success of that team. Team members need to know what their roles are, and they need to understand how those roles intersect with the culture and vision of the team.

**SET CLEAR EXPECTATIONS AND SHARE YOUR VISION**

For example, at InSync our culture dictates that our customers have to have a great experience. That is one of our core values.

Because of that, our team managers need to constantly reinforce that individuals are empowered to make decisions about how best to serve the customer, and not worry about negative consequences later on. For example, while supporting a customer’s virtual class, the conference call service becomes unavailable. Our team knows that they can offer our internal phone service to the customer and ask about chargebacks later. What’s most important is that the team member has the opportunity to ensure that the customer’s class goes off successfully.

This is a small example. Once team members understand that they are empowered to make these types of decisions, they’ll feel more comfortable in more difficult situations.
PROVIDE THE RIGHT TOOLS

When you are completely virtual, communication needs to be intentional. We’ve all had the experience of misinterpreting the tone of an email message, or feeling left out of a conversation. There are many opportunities for this type of miscommunication in the virtual environment so it’s important to be aware of it and have strategies in place to mitigate it.

To help minimize the stress that comes with miscommunication, it’s important to have a strong communication toolset available, and to create guidelines on how to implement those tools. We need to be intentional about how to select the tools we use – don’t just pick one, and don’t just pick the easiest tool at your disposal without thought as to how it’s going to be used.

CONVERSATIONS – We use Skype for instant and ongoing communication. We created multiple conversations that continue, and add new people to the conversations as they join the team. Some have very intentional business purposes. We have a conversation that focuses on troubleshooting client technical concerns in the moment. (“Is anyone having trouble with voice over IP in WebEx today? Any suggestions on where I go for help?”) We have a “water cooler” for light conversation and relationship building. There are probably half a dozen other continuing conversations among sub-teams that support individual clients, or around social activities such as fitness and book clubs.

EMAIL – Email is used for scheduling, documenting client concerns, and issues that cannot be managed “in the moment.” We have guidelines on subject lines and email lengths, and team members are encouraged to give feedback on how to make email more usable and less intrusive.

VIRTUAL CLASSROOMS – We use WebEx Training Center and Adobe Connect when we want to have a work meeting, take notes, or rehearse presentations.

VIDEOCONFERENCING – We have many tools that can provide live video interaction. We use live video when the conversation is more about people than it is about process or product.

SHARED WORKSPACE – We make sure there is a shared workspace for files accessible from virtual offices, and that everyone knows how to use it!

It’s important to set up ground rules for using these various tools. For example, if you send a question in Skype and don’t get a response within one minute, resend the question through email and let the person know in the Skype conversation that they should check their email for more information.
CREATE A FORMAL “WELCOME” PLAN

Just because you’re on a virtual team doesn’t mean everything should be informal. Welcoming someone to the team should be thoughtful and deliberate. We start with virtual introductions in all of the relevant Skype conversations. The new team member then gets a technology tour by the operations manager to ensure that he/she knows how to track hours, manage their calendar, and use all of the tools available. Then, a mentor is assigned to provide guidance on how best to perform the job.
A virtual team can be fragile. Without the immediate physical support of colleagues, it is easy to feel isolated and to take offense at unintended (or sometimes intended) slights. Without the typical office chatter, an individual might feel hesitant to share concerns, illnesses, or even personal celebrations because he or she might not be confident they will be heard.

Because of this we need to protect our virtual teams by creating and promoting a safe environment. Some of the things that we do to accomplish this are:

HAVE A PERSON WITH HIS/HER “EAR TO THE GROUND.”
Not everyone wants to share with the “boss.” One of the most important team members is the person who knows who’s having a baby, who is struggling with the overnight hours, and who has concerns with other team members. This person is trusted by everyone to share the appropriate amount of information, and nothing more.

BE PROACTIVE ABOUT LOOKING FOR POTENTIAL ISSUES.
Look for body language in the bandwidth. Has someone suddenly dropped out of the virtual conversations? Have you heard a negative report? These are the times when you need to determine if there is an actual issue. And it’s the time for a phone call, not a text-based conversation. Listen to the voices of your team, let them know you care about them as individuals, and at the same time watch out for the well-being of the entire team.
EXTEND THE VIRTUAL WATER COOLER TO OTHER VIRTUAL (AND REAL!) EVENTS.
There’s a reason people get together for a drink after work, or lunch on a weekend. We spend a large percentage of our life working, and there is a level of comfort in making those connections. This doesn’t need to go away with the virtual team. Friday afternoon happy hours (rolling happy hour times to accommodate the different time zones), or coordinated virtual events can help to connect and protect a virtual team.

CREATE FORMALIZED OPPORTUNITIES FOR TEAM MEMBERS TO SHARE FEEDBACK.
Individuals are often hesitant to provide critical feedback even in comfortable environments. On a virtual team, when it is difficult to gauge reactions, these difficult conversations may never happen. Create those opportunities by implementing regular 360 degree evaluations to provide structured feedback between team members, and opportunities to build relationships and trust.

SHARE THE CREDIT, CLAIM THE BLAME.
My personal philosophy has always been that when things go well it’s due to the talent of the team. When an error is made, or a customer is dissatisfied in any way, the fault lies with the team leadership. No matter what happens behind the scenes, individual contributors need to know that they have the support of their leadership, even if they don’t have a personal face-to-face relationship with that leadership. Kudos are shared with everyone; concerns and reprimands are kept private.
LEADING A VIRTUAL TEAM

Any team is only as strong as its leadership. From the CEO to individual project managers, the vision of the team needs to be constantly reinforced and the values of the team need to be modeled. There are many organizations and books that can teach you about leadership skills, and that information is important to understand as background, but I think we all need to find our own way in leading our virtual teams. The following techniques have worked for me.

CREATE OPPORTUNITIES FOR RESPONSIBILITY.

No matter your personal management style, it’s very difficult to micromanage a virtual team. It’s almost impossible to watch over someone’s shoulder. This by itself is a reason for a virtual team leader to learn the art of delegation. We hire people for certain roles, but we need to allow individuals not only to evolve in their current role, but sometimes we need to redefine that role into something that makes more sense both for the virtual business model and for that individual. Creating opportunities for responsibility even for seemingly small but important tasks, is a way to both empower the individuals on your team and allow the people working more closely with your customers to determine what the best decisions are. I find that the people doing the front-line work often know the best way to get a job done, and allowing them to implement changes that they see without having to justify them fits perfectly with the concept of a virtual team approach.
MAKE YOUR VISION A COMMON VISION.
The vision and values of the team need to be shared. If team members truly understand that they are empowered to do good work, they will have a higher level of commitment to the rest of the team. Knowing that they have common goals, and not passive membership, inbues a vested interest in supporting one another because they can trust in the shared values.

BE THE LEADER.
A leader doesn’t just delegate. A virtual team leader supports, suggests, and provides guidance on how to best implement visions and values. It’s easy, on a virtual team, to sit back and forget about the individuals performing the day-to-day work. Find ways to regularly check in so your managers and team members know they are constantly supported. Be a leader they can be proud of.
Once the team is established, you need to create and maintain strong working relationships. You have already ensured that you’ve hired self-motivated and self-managing individuals. Now, these independent people need to learn to rely on one another. We call this quality “independent and interdependent.” This is a hard balance. Often, the people that are the most independent are the people least likely to trust an interdependent relationship. If they are managing a project with a global impact, they need to believe that all shifts will be covered without constant supervision.

How do you maintain the energy and interest of a very independent worker, while insisting they remain interdependent on their team members? If an individual doesn’t understand why it’s worth their effort to invest in these relationships, they will tend to become very inwardly focused on their own tasks. Some suggestions that we have found to be successful are:

**HIGHLIGHT INDIVIDUAL AND TEAM SUCCESSES.**

It’s very easy in this networked world to share successes. We maintain a private Facebook page in which we post every piece of positive feedback from a customer, no matter how small. Team members are also encouraged to share the successes of their colleagues. As the team leader, I try to keep track of individuals that aren’t in a position to receive public accolades (often members of the administrative and support staff) and make a point of publicly sharing their successes as well. This starts to create a feedback loop in which people are willing to share other people’s successes because they know the next time it will be their turn to be celebrated. This is easy. It’s not expensive. And it provides a history of all things positive.
PROVIDE PHYSICAL REWARDS.
Sometimes something more tangible is a more appropriate way of expressing appreciation. Small tokens, like challenge coins or thank you notes, received in the mail can be very reinforcing. Some kind of desk item can help to remind individuals that they are part of a larger team, perhaps give them something to be proud of. If your team or organization wins an award, find some way to commemorate that award and send something tangible to each individual to remind them that they contributed to that success.

BRING PEOPLE TOGETHER.
All of this virtual stuff is great, but sometimes it’s worth the investment in time and money to bring people together. Every two years we arrange a four-day retreat that is a true celebration and vacation. No work gets done on this retreat; rather we participate in meaningful activities to help us build our working relationships. We found that this helps build trust and it can repair relationships that may have not started in the most positive way. We also encourage people to meet regionally, or to let us know when they’re traveling to different parts of the country so we can connect them with colleagues they may not have met before. It’s heartening to see how excited people are to build on their already strong relationships, and to see them start to consider these virtual team members as true trusted colleagues.
CONCLUSION

I hope you find these tips and techniques helpful as you explore creating and managing your own virtual team. For us here at InSync, the benefits definitely outweigh the challenges and we wouldn’t do it any other way. The most personally rewarding thing I’ve ever done is lead InSync’s virtual team. From a team of two, to a team of 60, this group of people is exceptionally competent, extremely reliable, and totally laser-focused on providing the best customer experience possible.

And we did it before it was cool.

VIRTUAL TEAM RESOURCES

“Virtual Teamwork: Mastering the Art and Practice of Online Learning and Corporate Collaboration”, Robert Ubell (Ed.)

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Jennifer Hofmann, mastermind behind virtual classroom best practices and blended learning pioneer, is Founder and President of InSync Training. Her entirely virtual consulting firm specializes in the design and delivery of engaging, innovative, and effective modern blended learning. Under Jennifer’s expert leadership, Inc. 500|5000 named InSync Training the 10th Fastest Growing Education Company in the U.S. in 2013, the 20th Fastest Growing Education Company in 2014, and to their Inc. 5000 list for four consecutive years. Dell Women’s Entrepreneur Network, Forbes Most Powerful Women Issue, The NativeAdVantage, and Goldman Sachs 10000 Small Businesses have all recognized her entrepreneurial drive.

Jennifer has written, and contributed to, a number of well-received and highly-regarded books including: The Synchronous Trainer’s Survival Guide: Facilitating Successful Live Online Courses, Meetings, and Events, Live and Online!: Tips, Techniques, and Ready to Use Activities for the Virtual Classroom, and Tailored Learning: Designing the Blend That Fits with Dr. Nanette Miner. In 2018, The Association for Talent Development (ATD) released her newest blended learning title Blended Learning: What Works.

Jennifer frequently presents in-person and online for leading learning organizations including Training Magazine, The Association for Talent Development (ATD), eLearning Guild, Training Industry, and Training Mag Network. Subscribe to Jennifer’s blog Getting InSync and connect with her on LinkedIn for new content and timely insight.