



## Leading Virtual Project Teams – On and Off Shore

### Central Mass PMI Chapter Meeting, September 14, 2004

Presented by: Stefanie Heiter and Kevin Micalizzi, HeiterConnect, Inc.

#### But the instructions in my email were clear...

As we learned from our group activity with the paper, even though the instructions seemed clear, the end product looked very different for each of us. From our discussion we found the instructions could have been more clear and specific, in the real world our team members could have talked to each other or asked questions of us (hopefully), and it may have been more helpful to see what the deliverable should have looked like.

#### Viewing leadership challenges through the Virtual Leadership Comparison Model:

From the Virtual Leadership Comparison Model we saw that as you move into the virtual space, the complexity and volatility (the degree to which our actions or change can be sustained) increases dramatically.

### Tips for Leading Virtual Project Teams

#### Tip #1: Be Explicit

In the paper exercise, if we hadn't been given instructions not to talk, we may have asked for clarification. As project managers we want to help eliminate some of the assumptions that are made and be sure our teams know how to get clarification when they need it.

##### Make the implicit explicit in areas such as:

- Contracts
- Decision-making
- Communication plan and protocols
- Availability (hours, holidays, for what reasons)
- Sharing of Ideas
- Processes and procedures to follow
- Requirements gathering.

##### Create a communication plan:

Sometimes discussions happen and decisions are made informally at one site that don't involve remote team members who are affected. These "water cooler" conversations and decisions should be addressed through a clear communication plan – a plan for how a group or team will share information. We need to include the who, what, where, when, how, and why in our plan.

##### Your communication plan should include:

Our list of media available quickly expanded to include phone, fax, email, postal mail, instant messenger, team rooms, erooms, web conferencing, video conferencing, livemeetings. With so many mediums to choose from, our communication plan has to cover:

- When to use and not use each medium
- How to use each medium – conventions and protocols
- What information is needed by when
- Goals tracking and status updates
- Version control
- External stakeholder communications

##### Communication evolves, avoid surprises:

From the example of differing views of email (real-time vs. checking once daily) we see that communication evolves over time. Changes can occur internally or be imposed externally. If you are located with your team, it is much easier to gauge reaction by those around you. In the virtual space a communication plan helps to ensure there are no surprises, helping your team be more effective.

## **Tip #2: Create Presence**

We can use “presence” to create better relationships with key people at other sites, including those off shore. Presence is important because it fosters connections, it:

- helps create trust
- overcomes isolation from leader and others
- elevates team priorities
- keeps leader informed about contract sites
- motivates through connection
- ensures feedback
- models what you want from contractors

Think about the efficiency vs. effectiveness of your communication, build in informal time (even if it seems awkward), ask about likes/dislikes, or ask about project horror stories.

### **Behaviors that help create presence:**

Some of the behaviors that help create presence are:

- being in touch regularly – reaching out – pick up the phone, not just when you need something
- getting needed resources
- encouraging involvement
- being available – let them know your hours, how to reach you
- knowing about activities at sites—what’s the scoop? know their holidays
- knowing about people at sites
- pushing information to sites
- getting input in decisions

Building and maintaining presence in the virtual space can be more difficult, but is essential to your success. Be available to the other person and make sure they know you are available. Having presence at the remote site will help you build better relationships and connections. It will also help you understand their culture and environment.

## **Tip #3: Influence through Reciprocity**

We asked how many project managers have only dedicated resources on their team that report directly to them. The lack of hands clearly demonstrated the challenge most project managers face, how to make sure the work gets done, despite competing priorities and responsibilities.

### **The Law of Reciprocity:**

As the Law of Reciprocity states “Anyone who does something for someone else expects to receive value from the exchange—whether tangible or intangible.”

You may not control salary, hiring, or firing, but you can influence through: exchange, mutual gain, partnership, trade, barter, give & take.

### **How influence works:**

The individual who wishes to exercise influence wins the support and cooperation of others, by offering to help them satisfy their goals. An effective influencing model includes the following steps:

1. Clarify your own goals and priorities
2. Seek to understand the world of others
3. Identify something of value to exchange
4. Build equitable relationships

The best way to identify something of value to exchange is by creating presence. Talk to them. Make sure you understand them and their world. Then you are in the perfect position to identify what you have of value to them. The exchange can be as simple as giving recognition they want, providing dinner in the office, or Lindt chocolate truffles. It could involve helping them advance their career, talking to their manager about the quality of work they are doing, and what’s happening with their work on the project. It could include taking a seemingly “impossible” project and spinning it as the “project of a lifetime.”

### **Build equitable relationships:**

Whatever approach you take or value you find to exchange, make sure the exchange is equitable. You should both be comfortable with the outcome. It is important to maintain good relationships through this process.



## **Tip #4: Be Culturally Curious**

In a recent engagement with a company that off shored much of its IT work to India and the Philippines, we found at lunch people congregated with others from the same site: India, Philippines, Japan, US. The question we had to ask is, why aren't you taking the time to explore? Why aren't you taking the time to build relationships with people from other sites?

### **Style, language, and cultural differences:**

In some cultures you are expected to challenge the project manager, in others it is not considered acceptable. Be aware of style, language, cultural differences:

- Develop and adjust communications
- Adjust for English (or other) as primary language
- Understand the differing cultural values of the country, region

### **Cultural impacts:**

Culture can impact:

- How we behave
- How we interpret behaviors
- How and what we communicate
- How we give bad and good news
- How we ask and answer questions
- What "yes" means
- Our work ethic
- Quality standards
- And so much more.....

### **Typical barriers:**

Typical barriers can include: Clock (holidays); Calendar; Decision Processes; Ethics; Rewards .

### **Culture clashes:**

Sources of culture clashes

- Lack of understanding, comfort, experience with people from different cultures
- Mismatched expectations
- Fear of reduced career opportunity

We talked about "yes." It can mean: I heard you; I acknowledge that you are speaking; I will do it; it can be done, but not by me; I would like to be done with this agenda item/meeting. Remember in some cultures it is more difficult to say "no." Ask a lot of questions.

### **Indian and Filipino cultures:**

We didn't have time to discuss, but here are some critical aspects of Indian and Filipino culture.

#### Critical Aspects of Indian Culture

- Highly personal
- Generally too polite to say "no"
- Eager to please, loyal

#### Critical Aspects of Filipino Culture

- Individuals act within context of group - collective
- Highly personal
- Try to avoid conflict

### **Don't be afraid, be curious:**

Instead of being afraid of making a mistake, be curious. Ask questions in a way that is respectful. Would you be offended if someone asked you about your culture or your cultural perspective? Chances are they won't be offended either. If you don't ask, you may be judging people on one scale when they are coming from an entirely different scale.

### **Keep in touch:**

For more information or to let us know about how these tips have helped you with your virtual challenges, contact us at: Stefanie Heiter [sheiter@heiterconnect.com](mailto:sheiter@heiterconnect.com); Kevin Micalizzi [kmicalizzi@heiterconnect.com](mailto:kmicalizzi@heiterconnect.com); 978-597-9157, or [www.heiterconnect.com](http://www.heiterconnect.com).

