



HeiterConnect, Inc.

MiniConnect Series: Virtual Teaming Fundamentals

November 3, 2004. Presented by: Kevin Micalizzi, HeiterConnect, Inc.

Defining virtual teams

We discussed what ‘virtual team’ means to us: not directly managed, not co-located, not constant teams – come together for a particular task, separated (time, geographical) and often includes language barriers. Our more formal definition is “a small group of people from the same or different organizations, who interact through interdependent tasks to achieve a common purpose.”

Differences between co-located and virtual teams

The greatest difference between co-located and virtual teams is that co-located teams share the same physical space and virtual teams are dispersed. In co-located teams, we agreed it is easier to talk and show things, communication is quicker, and you can rely on body language more for understanding. With a virtual team, there is a greater opportunity for misinterpretation of communications, less opportunity to create trust, and most meetings need to be planned in advance.

Virtual Teaming Principles

1. Make the implicit explicit

In a co-located situation, it is far easier for us to gauge our reactions and behaviors based on those around us. We learn quickly whether or not it is ok to join meetings late or multi-task during a meeting. In the virtual space, team members have fewer cues to rely on. We need to create operating agreements so everything that would be implied in our co-located teams, becomes explicit for our virtual teams.

2. Slow down to speed up

With all the pressures in today’s corporate life, it is common for us to charge forward. Slow down to speed up means taking the time up front to make sure things are set up properly. For instance if we take the time to define when status reports needs to be turned in, how they are to be sent, and what they include, we reduce the possibility of re-work being required. This creates more time for us in the end.

Critical success factors

Alignment to clear purpose; Clear, active, accessible communications; Adherence to explicit operating agreements; Ability to be independent and interdependent; Ability to give and receive feedback; Ability to be flexible and adaptive; Get people on the same page emotionally; in the same space → Are all related to **trust**.

Self-organizing systems

We briefly discussed the research from Margaret Wheatley on self-organizing systems. When we apply to our teams the same concepts that allow termites to build 20 feet tall complex mounds, we have the opportunity to increase productivity by +35%.

“If people are naturally self-organizing, then the challenge for leaders is how to create the conditions that more effectively support this capacity.” – Margaret Wheatley

The Three I's

1. Identity “the sense-making capacity”	2. Information “the medium, the nutrients”	3. Interaction “the pathways”
<ul style="list-style-type: none"> • Belief that something more is possible now that the group is together • Intentions and desires of team members • How is the world going to be different because you and I are together? • Purpose – in a chaotic world, this needs to be the most stable aspect • High alignment, high autonomy • Clarity frees people to contribute in creative and diverse ways <p>Ways to help solidify identity:</p> <ul style="list-style-type: none"> • Get together • Share information about self • Plan time for personal connections • Leverage member's expertise • “Team contract” (operating agreement) • Ground rules • Goal, vision, success factors 	<ul style="list-style-type: none"> • Only when information belongs to everyone can people organize rapidly and effectively around shifts in customers/partners, competitors and environments • When information is available everywhere, different people see different things • People need access to information that no one could predict they would want to know. They may not even know they need it • Information = fast, well-integrated, effective responses <p>Ways to increase information sharing:</p> <ul style="list-style-type: none"> • Use technology • Create project web site • Email aliases, forums, web conferences • “Brown bag” sessions for knowledge sharing • Weekly calls • Instant messenger • Outlook scheduling • Web boards 	<ul style="list-style-type: none"> • Through relationships, information is created and transformed, the organization's identity expands to include more stakeholders, and the enterprise becomes wiser • Relationships are pathways to intelligence <p>Ways to foster productive interactions in virtual teams:</p> <ul style="list-style-type: none"> • Track who participates, encourage those who are not participating • Solicit input • Have sections of the meeting organized by members of the team • Opportunities to celebrate success • Handoffs/transitions – critical points

Next Steps

Bob: Plan for virtual meetings in parallel with project

Ken: Coach leaders about virtual challenges

Jim: Build in opportunities to build trust through interaction and team building activities.

Keep in touch:

For more information or to let us know about how this information has helped you with your virtual challenges, contact us at: Kevin Micalizzi info@heiterconnect.com; 978-597-9157, or www.heiterconnect.com.

