Chapter 5

Best Practices for Working in a Virtual Team Environment

These practices are not limited to teams that are completely virtual. This set of practices and guidelines can be applied to both completely virtual teams and blended teams. The guidelines are broken down into three main sections: organizational practices, team leadership, and team practices.

Organizational Practices

Do not choose a tool based on its shiny factor.

The most robust tool with every possible widget imaginable is not always the best choice. You may need only a simple program for the job. Choose the tool that gets the job done with as small a learning curve for your employees as possible. A smart lady once told me to never use a shotgun when a water pistol will do. Sometimes, all we need is a little water.

The larger the pool of knowledge, the greater the chance that they will have the answer.[1]

Expecting a very small group of people to build a knowledge base is not a terrible idea, but it will take longer, will require more effort, and may have some holes. When using technology for this purpose, consider ways you could use the technology to partner with others whom the knowledge may also help. For instance, are there other libraries in your area that might be willing to help create a knowledge base if the subject was local history or genealogy?

Combining tools gives a team greater flexibility in how they choose to complete their goal.

Teams that have a variety of tools to choose from and implement the tools wisely are more successful and work together better than teams that have only one tool at their disposal.[2] It is important that an organization offer its working groups a set of options that work well together. Teams that can choose what is best for them will be more empowered and will, in the end, be happier and produce better work.

Experimentation should be the rule, not the exception.

Organizations that encourage experimentation empower their employees, and this environment produces better teams and better team products.[3] Teams, in addition to having many choices, should be free to experiment and bring new tools into the organizations if the tools meet the needs of the team. Experimentation is more about trust than anything else. If employees know that their employer trusts them enough to make good decisions about the tools they use to complete the job, then their work product will show the empowerment they feel.

Early adopters should be used as models to create best practices for the rest of the organization.[4]

Once the early adopters have used a new tool, the organization can use them to teach and empower others in their working groups. Early adopters can be great cheerleaders for many changes in an organization, not just technological ones.

Encouraging early adopters to teach others empowers all the employees.

The teachers will know they are trusted, and the staff who are learning will know that employees at all levels are valued for their knowledge and experimentation. Studies

have shown that organizations in which knowledge is shared across the organization, not simply from top to bottom, have more successful virtual teams than those in which it is not.[5]

Good tech support within the organization is essential.[6]

Tech support can come in many forms. If you are unable to have a supportive in-house IT department, then knowing which of your employees can act as a knowledge base for certain tools is important. If your employees are experimenting and using different tools, the organization needs to be able to support them in their tool usage.

Team Leadership

A successful team must have a leader, but it is especially true for virtual teams.

Virtual teams need someone to be the facilitator and driving force behind the team's work.[7] Someone must be responsible for making sure that team practices are followed, team members stay engaged, and deadlines are met.

Coaching and mentoring increase a team member's ability to stay engaged and productive.

Virtual work can cause stress and isolation, but familiarity with the tools or good coaching and mentoring will increase overall satisfaction.[8] A team leader needs to be aware of the satisfaction levels of the team. A good leader will be able to encourage team members and mentor them when issues arise. A team member who is more satisfied will be more engaged and productive.

Team leaders are cheerleaders for their work group.

Groups with a strong leader who gives positive feedback and acts as the group's cheerleader are more fruitful and efficient.[9] Receiving positive feedback also helps group members to feel appreciated.

Successful group leaders consciously foster engagement because a group that has a shared group identity works together better.

A group leader can foster team identification and community through online group activities, mentoring, and goal tracking. Leaders who engage their team members as a group have an easier time keeping their teams on track and are more successful in achieving their goals.[10] Team leaders should remind the team often of what their goals are and how the team has decided to achieve those goals. Informal communication methods, such as IM, can create a relaxed environment in which team members can get to know one another in a natural way. If group members share things about themselves in the course of a normal conversation, this creates a more realistic reflection of how people learn about each other in real life. A team leader can encourage these types of interactions by allowing the team members to be personable and themselves, even during the discussion of the group's work.

A good team leader will use a variety of tools to facilitate the work of the group and to encourage its members.[11]

Not all tools work for every person. A good leader will recognize, for example, which employees respond best to a phone call, e-mail, time lines, or IM.

Team Practices

Teams should have more than superficial interactions online.

Teams that have a sense of identity and perform better have an open communication structure. High-performing online teams share less declarative and procedural info and do more synthesis.[12] Declarative and procedural information do not require much discussion or interaction. They are merely a sharing of existing facts without application. For instance, procedural information may include a description of a work flow process, but synthesis would go a step further and discuss meanings, implications, and areas for change in the process. A successful team will discuss the deeper layers of topics, do more synthesis, and are less likely to spend large amounts of time on rote information, declarative and procedural information.

This means that the online work environment of a team should be one in which the members feel comfortable engaging in challenging discussions about their work. Team members feel more satisfaction when discovery and creation occur than when information is merely exchanged.[13] Team members can foster this environment by starting conversations themselves and being open to the new ideas shared by their teammates.

Experimentation is important on all levels.

Not only is it important for organizations to encourage experimentation with technology, but teams that experiment with technology are likely to more efficient and have a better work product.[14] Teams that feel comfortable seeking out alternative solutions will be more creative and participate in more discovery-seeking behavior. Discovery-seeking behavior can be defined as behavior that is exploratory and seeks answers to questions by testing different

ideas and theories. Discovery seeking moves beyond the face value of challenges and looks into motivations of things. You could think of this as the scientific method version of group work, with a hypothesis, procedure, and outcome. A group that engages in discovery-seeking behavior will reason out theories and idea with each other until they find the right solution to their problem or challenge. This process creates an environment that is open and empowering and continually creates new ideas.

Successful teams have "routines of conversation."[15]

This means that the team members have routines that they all follow. For instance, each team member checks into the team's project management site five times a week or checks the message board every day for new conversation activity. Teams that know they can rely on each other to get the job done will have more cohesiveness and be more efficient. It might be beneficial for the team leader to express a loose set of expectations, especially at the beginning of the team's work, to help the team create good practices. These good practices will soon be routine for the team, but the team leader and team members can all help to keep each other accountable to the team's shared expectations.

Frequent check-ins with the team helps team members keep track of work progress and goals.[16]

It is essential that team members stay engaged in the process. Members who frequently check in with the team will be more committed and efficient. Frequent check-ins also increase accountability among team members.

Context is more important than the tool.

"Contextualization richness" is more important than media richness, especially when a team is performing nonroutine tasks.[17] This means, for example, that creating a webcast for your group without providing context for the information does the group little or no good. When presenting information to a group, the team member should always take into account the type of information to be shared. The context and type should drive the tool choices, not the other way around. This also supports the idea that simple tools are sometimes the best ones for the job. If a team needs to have a conversation about an issue, it may be more beneficial to use a lower-tech meeting option, such as IM, than the more sophisticated Web conferencing tools at their disposal. IM, though informal and low-tech, provides the opportunity for equal discussion between all parties involved, where a webcast is the pushing out of information from one person to the group.

Teams should always have clearly defined goals.

Virtual teams and teams that do much of their work online need to have clearly defined goals and boundaries in order to be successful.[18] Not only do goals increase group identity, but goals will also increase job efficiency. Many project management tools have built-in systems for goals and to-do items that can be assigned to specific team members. Proper utilization of these tools can help team members stay on task and accountable to their team and themselves.

Teams should encourage one another.

It is more than the leader's job to support and encourage team members. Successful teams are composed of individuals who empower one another to do great work. Team members can encourage each other by giving positive feedback, creating a supportive space for discussion, and being accountable to their group's goals and deadlines.

Notes

1. Gerardine Descanctis, Anne-Laure Fayard, Michael Roach, and Lu Jiang, "Learning in Online Forums," *European Management Journal* 21, no. 5 (October 2003):565–577.
2. Ibid.
3. Catherine M. Beise, Fred Niederman, and Herb Mattord, "IT Project Managers' Perceptions and Use of Virtual Team Technologies," *Information Resources Management Journal* 17, no. 4 (October 2004): 73–88.
4. Ibid.
5. Ibid.
6. Ibid.
7. Descanctis, Fayard, Roach, and Jiang, "Learning in Online Forums."
8. Liz Lee-Kelley. "Locus of Control and Attitudes to Working in Virtual Teams," *International Journal of Project Management* 24 (2006): 234–243.
9. Anu Sivunen, "Strengthening Identification with the Team in Virtual Teams: The Leaders' Perspective," *Group Decision and Negotiation* 15 (2006): 345–366.
10. Ibid.
11. Beise, Niederman, Herb Mattord, "IT Project Managers' Perceptions and Use of Virtual Team Technologies."
12. Descanctis, Fayard, Roach, and Jiang, "Learning in Online Forums."
13. David L. Paul, "Collaborative Activities in Virtual Settings: A Knowledge Management Perspective of Telemedicine," *Journal of Management Information Systems* 22, no. 4 (Spring 2006): 143–176.
14. Descanctis, Fayard, Roach, and Jiang, "Learning in Online Forums."
15. Ibid.

16. Ibid.
17. Ann Majchrzak, Arvind Malhorta, and Richard John, "Perceived Individual Collaboration Know-How Development Through Information Technology-Enabled Contextualization: Evidence from Distributed Teams," *Information Systems Research* 16, no. 1 (March 2005): 9–27.
18. Descanctis, Fayard, Roach, and Jiang, "Learning in Online Forums."