

Research Note 01-16

Managing Virtual Teams

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Executive Summary

A virtual team is formed when at least one of the members of the team works in a different location, time zone or culture. Virtual teams have been used for many years and a significant amount of knowledge has been built up about good practices in managing virtual teams and in particular managing virtual meetings. Over the last few years there has been a great deal of emphasis on improving collaborative working practices, and this is often the justification for investment in new technologies. Usually there is no metric of collaboration effectiveness so there is no means of knowing if the technology made a difference.

Many of the reports, papers, conferences and books on collaboration and social media seem to assume that team working only takes place between people working in the same company, the same country and speaking the same language.

This Research Note sets out the benefits and challenges of virtual teams, and focuses in particular on the management of virtual team meetings. The report sets out ten recommendations on how to make effective use of virtual teams and virtual team meetings. More information and guidance is to be found in books and research papers on the management of virtual teams which are listed in the Resources section.

Note

This is an updated and revised version of a Research Note published in 2012

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1. Introduction

At the present moment everyone seems to be writing about collaboration, offering advice technology selection and implementation, and on building business cases for purchasing the technology. One of the primary justifications for the adoption of SharePoint 2013 is often to enhance collaboration, though very rarely has there been any systematic analysis of the extent to which employees are already collaborating successfully and whether the technology barriers are real or imagined. The same is true for social businesses and social networking.

Implicit in virtually all the reports, publications, columns and blogs about collaboration is that there is a consistent business culture, employees are co-located and employees all speak read and write a common language to a common standard. Even in small companies that is unlikely to be the case as many employees will be out of the office selling and delivering products and services. In larger companies, especially those with customer and supplier relationships in more than one country, that is certainly not going to be the case.

The digital workplace vision is about providing location-independent access to information resources and to the skills and expertise of employees. A consequence of this is that working in effective virtual teams is going to be increasingly important. A virtual team exists where one or more members of the team make their contributions from a different location and/or a different time zone and/or a different national culture than other members of the team. Virtual teams have not been created by information technology. Native Americans and the Chinese have communicated over long distances using coded smoke signals for several thousand years. The danger with IT is that it may end up highlighting inadequacies in the management of virtual teams, not improving their effectiveness.

The research literature on virtual teams dates back to the initial development of Quality Circles in Japan in the mid-1960s, an approach that gathered considerable momentum in the motor industry in the 1970s and 1980s. Little of this research has been cited by the intranet community and in presentations at intranet and social media conferences is there any reference to good practices in virtual team management.

This Research Note sets out some of the issues that need to be taken into account in managing virtual teams, and highlights some of the resources that intranet managers should add to their collection.

2. Virtual teams – benefits and challenges

Probably the most comprehensive survey of virtual team adoption currently available was undertaken by the Economist Intelligence Unit in late 2009. This survey was restricted in scope to European organisations. The findings are as valid in 2012 as they were in 2009 given that virtual teams have been in operation for at least three decades longer than intranets.

The main reasons quoted in the report for establishing virtual teams were

- Improve collaboration with other business units
- Tap into a larger pool of expertise
- Improve competitiveness through a faster response to opportunities
- Cost reduction, especially travel costs and the need for internal meeting spaces
- Improve collaboration with customers, suppliers and partners

The challenges of working in virtual teams were seen as

- Misunderstandings due to differences in culture, language and an inability to read people's expressions
- Difficulty in leading teams remotely
- Difficulty in building camaraderie and trust
- Difficulty in managing the productivity of virtual teams



- Managing information overload

The success factors for managing virtual teams that emerge from both the EIU and more recent surveys by RW³ Culture Wizard are

- Setting clear, achievable goals
- Getting team members to meet each other face-to-face at least once
- Selecting the right team members
- Creating a common sense of ownership of a project or an objective
- Having an agreed code of practice for the conduct of meetings

The management of virtual teams is a wide-ranging subject. In this Research Note the focus is on the management of virtual team meetings. There are some excellent books on other aspects of virtual team management and they are listed in the Resources section on p11

Building a virtual team takes a lot of care and effort. The considerations of language, location, time and culture have to be taken into account in not only the selection of the staff concerned but also in setting up and managing each meeting. There may be potentially a key member of the virtual team who does not have good spoken language skills and it may be necessary to bring in an interpreter who themselves may not have the security clearance to be participating in the meeting.

Adding someone to the team may be required but removing someone could be very difficult. In a physical meeting situation a quiet word to a manager may be effective but in a virtual team that call has to be made by phone, and the person who is asked to leave may feel that not enough has been done to enable them to contribute to the meeting. The newcomer may also change the dynamics and levels of trust in the team.

3. Language

Most multi-national companies adopt English as a corporate language for corporate communications, but certainly companies outside of the USA are made aware every day that this is a guideline and not a command. This is especially the case in Europe where it is difficult to travel more than 500 miles from a city centre without entering a country with a different language. In some areas of the world, notably Asia using English as a language for managerial communication makes a lot of sense as learning languages such as Thai is a very considerable challenge. The situation in Central and South America is very different as with the exception of Brazil all the countries have Spanish (with some strong national variations) as their national language. It is also worth remembering that around 40 million US citizens speak Spanish as their first language.

The evidence from the Digital Workplace Trends 2012 report is that overall 10% of organisations have language and cultural issues in collaborative work. The percentage increases with the scale of the organisation, and nearly 75% of companies with more than 50,000 employees reported that they experienced these issues to some extent.

There are also some differences between English and American, some of them more subtle than using 'gas' for 'petrol'. . In the USA if you are asked to slate a meeting you know that you will need to set a date and perhaps the attendees and agenda. In the UK if you asked someone to slate a meeting they would ask you which meeting you wanted them to criticise. How can the same word have totally different meanings? The US usage is derived from a French word meaning 'to splinter', which is what slate does when it is mined. The UK social usage is derived from an Old Norse word 'sletta' meaning 'to slap'.

In meetings with attendees from different countries it is often easier for them to understand English spoken as a second (or even third) language than English spoken by a native speaker because of the use of idioms and inadvertently complex sentence constructions. An important



point that is often overlooked is that native speakers of English need to allow time between sentences to give others a chance to 'translate' concepts (rather than words) into their own language. Many non-native speakers of English experience considerable difficulty in translating the [British use of irony](#) into reality.

Whatever language is agreed for the meeting has to be adopted for all discussions. It is very disconcerting when some participants have side conversations in a different language. This is why a protocol or code of conduct for virtual team meetings is so important to develop and implement.

When planning virtual team meetings it is important to understand that there are four elements of language skills

- The ability to speak
- The ability to understand what is being said
- The ability to write
- The ability to read

There is a very good report from the [Council of Europe](#) which highlights the range of linguistic skills that need to be taken into consideration.

Individual team members may have different levels of skill in each of these four areas, and making an assumption to the contrary could lead to major problems with understanding and with decision making.

4. Location

The concept of location is also complex. Members of the virtual team could be in different floors of the same building, in different buildings, in different countries and of course not even in a building at all but in a train, plane or hotel dining room. With audio or Skype video conferences it might not be at all obvious where the attendees are actually sitting. The location may have an impact on ambient noise levels, on whether the attendee can be overheard by colleagues or strangers, and on whether it is possible for the attendee to write notes of the meeting.

This mobile location component is increasingly important as mobile technology enables people to be away from their offices on a more extended basis. Even a small company operating on a regional basis may want to include one or more of its employees with others in a virtual meeting. It is important to understand that even having one person phoning in to what otherwise would be a regular physical meeting will change the dynamics of the meeting. This is especially the case when the person leading the meeting tries to do so from a remote location, or even on vacation.

This is because another aspect of location is the distribution effect. If the majority of the participants are in one location then they will be a dominant force in the discussion, especially if the leader of the meeting is also present at that location. They will also have the benefit of being able to see the body language of their colleagues and to time their contributions to the discussion.

5. Time

Just some of the challenges of time in virtual meetings include

- Different working weeks (e.g. in the Middle East)
- Different times to start and end the working day
- Different approaches to 'lunch time'
- Different vacation periods
- Public holidays – national
- Public holidays – regional (UK, USA)
- Religious holidays (many vary in date each year)
- Other holidays (Carnival in Germany)



- Seasons re Northern/Southern Hemisphere
- Daylight saving time adjustments
- Different date formats (is 10/04/2012 10th April or 4th October?)

For any organisation with virtual teams the intranet should be an authoritative source of information on these date and time issues, but finding a mutually convenient day and time requires good diary management through team calendars and presence indicators.

Some the variations are quite subtle. For example in France when a public holiday falls on a Thursday or Tuesday, it is common practice to "make the bridge" (faire le pont) by taking off the Friday or Monday. It often comes to a surprise to US-based or US-owned companies that colleagues in Europe have much longer holiday periods and that the main vacation period for Scandinavian countries is not the same as for France, for example. There could be periods when for three months in the middle of the year it is very difficult to find dates for meetings.

We all want to manage our own diaries and feel uncomfortable when someone calls a meeting at an unsuitable time without prior consultation. Even if we can actually participate in the meeting we may do so in a less-than-constructive way. Even a small change in time, say from 09.00 to 08.30 could be very difficult for people commuting by public transport to accommodate easily. It is quite common for people to blank out periods of time when they need to work on a report or just want time to think. They may be willing to take part in a virtual meeting if they are confident that the meeting will be productive.

Just relying on a shared corporate calendar can easily result in not being able to find a mutually convenient time, and then forcing a meeting time out of desperation. Virtual teams need very good channels of communication and very high levels of trust within the team. People may then be willing to set up a meeting at a time that is perhaps inconvenient to them in the wider interests of the team and the company, but this position takes time to evolve and the trust can easily be broken, never to be given again.

6. Organisational culture and management structure

Not only may job titles and roles differ across an organisation but so does the level of authority to make decisions and commit the organisation to a course of action. Does a Senior Vice-President in the USA outrank a Divisional Director in the UK? A virtual meeting of 'Marketing Managers' across the world may end up with some members of the team having no authority to take action without reference to their manager.

Social conventions also need to be recognised. With Japanese companies junior managers in a meeting will wait for the senior manager present to take a position, and the Chinese ethos is not to criticise in an open meeting. It is also not uncommon for people in some cultures to say 'Yes' when in fact they are not supporting the decision but are saying that they understand the issue and will refer it back to a more senior manager. Another aspect of social convention is how team members wished to be addressed. This is not just a question of working out the family and given names of employees from countries such as China but also how the names (e.g. Xiaojin Zhu) should be pronounced. Initially some members of the team may wished to be addressed as 'Mr.' or 'Dr.'

7. Audio and web conferences

Probably the two dominant technologies for virtual teams are audio-conferencing (perhaps with a web channel to use for PowerPoint slides and other graphics) and video-conferencing. It is still surprising how few organisations recognise that a group of people clustered around a speaker phone is not adequate for a virtual team meeting. Audio stations are very inexpensive but are rarely available, so participants tend to shout to make sure they can be heard. This is regarded as offensive by many so they will decide not to participate.



With audio conferencing it is not what is said that is important, but what is not said. It is easy for participants to use instant messaging, social media or even e-mail to conduct side-channel conversations with others in a way that would not be possible in a physical meeting. “I’m going to say that we cannot meet the deadline. You and I know we can so don’t contradict me and we’ll both be heroes” might be a typical back-channel instruction! The lack of body-language also means that there is no indication that everyone is listening and understanding to the same level. This comes back to language issues. A momentary frown by someone at a physical meeting may cause the speaker to clarify a point, or even ask if the person has a question or comment. This is not possible over a telephone call.

Many companies insist that each participant takes part using their PC or individual speaker phone so that it is easier for all concerned to note who is in a meeting. Applications such as Go-To-Meeting will show which member of the team is speaking, and this is very useful when people forget to introduce themselves.

There are now many web conferencing applications and it can take a while to understand how to use the facilities provided. There may be an icon that participants can use to indicate they wish to speak, but that may not be immediately obvious and the participant may not be sure what the indication is to the leader of the meeting. It is important to trial out a web conferencing application ahead of an initial meeting, or when a new member joins the team. A sound understanding of band-width and availability issues is very important, and the IT teams around the world need to be aware of the conferencing requirements for their locations.

8. Video conferences

Video-conferencing does not always overcome the “human moment” issues. Tele-presence equipment is coming down in price but still requires high-bandwidth network connections that may be difficult to set up in some countries. There may just be one camera on top of the video monitor that is being used by perhaps a dozen people sitting around a table. It is quite difficult to look at the camera and the monitor screen at the same time, and as with audio and web conferencing prior practice sessions are very important. These sessions will also help team members to know more about their colleagues and to get used to the way that they speak before the team starts to work together on an important project.

9. Maintaining momentum

It is easy to focus only on the logistics and management of virtual team meetings. The greater and arguably more important challenge is to maintain the cohesion of the team between meetings. At the end of a virtual meeting it can be difficult to determine the outcomes and actions. One factor in this is that virtual meetings tend to end at a specified time rather than when the meeting has reached a natural conclusion. As a result there can be a rush to complete the agenda and agree who is taking the actions in order that attendees can move on to their next virtual meeting!

There is an assumption with virtual teams that everyone is taking their own notes of the meeting, but this can result in a meeting seemingly having different outcomes depending on the perspectives of each attendee. There is rarely time in the working day for the meeting manager to write up notes of the meetings and in any case the meeting manager will be multi-tasking to a much greater extent than in a physical meeting.

Virtual teams with members from across the organisation certainly have the benefit of bringing a wide range of expertise to the meetings but often the attendees report to a wide range of different managers. The attendees may make commitments at the meeting in good faith that they will be able to deliver on them but their manager may have a different view of priorities.

A major challenge can be agreeing where documents related to the meeting are to be stored. Organisations now have multiple storage options, which might include document management systems, SharePoint, social media, email folders and cloud-based storage. It is not uncommon for documents to be stored in a project area (for example on SharePoint) which may not be easily



accessible to other members of the team. Even if they can download documents they may not be able to edit them or upload them to the project space.

It is advisable to set out an information management policy for a virtual team that sets out policies for (as examples)

The creation of documents, including acceptable file formats and presentation standards such as page numbering, headers and footers.

- Where these documents are to be stored
- How versioning be managed, especially where team members are working on the same document
- The access rights to the documents (read only, read/edit)
- How the documents be made discoverable (folder structures, tagging, search)
- Can the documents be shared with people not on the team (including people outside of the organisation)

These are of course basic to any team but need to be more carefully considered and communicated in a virtual team setting, especially when the team extends to other countries with perhaps different approaches to document management. The use of the term 'document' in this paragraph is a convenience. Many other types of content may be created, such as the recordings of a Lync meeting.

10. Feedback from virtual team members

When members of a team are working in the same location feedback about a meeting is easy to make, perhaps over lunch in the company restaurant. This is not possible with virtual teams, and therefore much more attention needs to be paid to making sure that there are effective feedback channels, both through line-reporting but also through the personnel and training departments.

The core issues include

- How were they brought into the team?
- What were the initial impressions of the team membership?
- What are their views on team relationships?
- How well defined and supported are the processes?
- Were their training needs identified and met?
- Were the applications used appropriate?
- How well they think the team has performed?
- How they approach participating in a virtual team in the future

11. Training in virtual team participation

In view of the increasing importance of virtual teams companies should be providing training in how to manage virtual teams. However this is rarely provided, usually because managers do not appreciate the issues that need to be addressed on the basis that no one has ever commented unfavourably on how they run virtual meetings!

These include

- Understanding the skills and experience that team members need to have to be effective members of a virtual team.
- Maintaining close working relationships with the managers of team members to ensure they are aware of the organisation and office environment in which team members are operating.



- Taking additional time to prepare for a meeting so that for example all team members have the documents they need several days in advance.
- Being adept at using conferencing and social media applications to help the team achieve objectives.
- Being able to motivate team members that they have not met, and may not have chosen to be a member of the team
- Being ready to call team members by name to contribute, remembering which team members may not have spoken for a period of time.
- Accepting that it is very difficult to concentrate on leading a virtual team meeting and make notes of the discussions and actions.

A team leader who is excellent in managing physical meetings may not be equally as proficient when managing virtual team meetings. If leading or even participating in virtual teams is a core activity then their performance should be included in annual performance appraisals.

Some companies have built a certification process into virtual team participation so that employees (and managers) initially build up expertise in single country/same time zone virtual meetings and then progress to managing complex multi-national multi-cultural teams in due course.

12. A lesson from history

On 28 January 1986 the Challenger Shuttle launch ended in disaster as the booster rockers exploded. Seven astronauts died and America's space technology reputation would take years to recover. On 27 January a virtual team meeting was held. It broke all the rules of effective virtual meetings and was a major factor in the decision being taken to launch. The meeting is described in detail in the 50 pages of Chapter 8 of *The Challenger Launch Decision* by Diane Vaughan. A lesson to be learned.

13. Recommendations

Ten recommendations for getting the best out of virtual teams and virtual team meetings are

1. Recognise that virtual teams are going to be increasingly important to any organisation, and ensure that current and potential participants have access to training and mentoring on virtual team management and virtual team meetings.
2. Virtual teams should have very clear objectives so that it is possible to set the investment in the team against the outcome and also that team members bring appropriate skills, expertise and authority to take action.
3. Leadership skills that work for physical teams may not be as valuable in a virtual team environment. Other skills are needed and have to be acquired through practice, not just through reading or teaching.
4. Without good team meetings a virtual team is very unlikely to achieve its objectives and so particular care should be taken in developing guidelines for virtual meetings and for facilitating feedback.
5. Develop good profiles of each team member, taking into account local availability of technology and offices which can be used to take part in virtual meetings (especially in the case of open-plan offices) and language expertise.



6. Ideally each team should have an opportunity to meet with other members of the team at the outset of the team being set up. Where this is not possible there should be an initial virtual meeting where team members can introduce themselves and gain experience with the technology being used before the first formal meeting of the team.
7. Team dynamics of virtual teams can be quite fragile, often depending on a very high level of trust in people they may not have met before. Introducing a new team member into an existing team may mean starting the process of building trust all over again.
8. Social media applications can be of value in supporting virtual teams but may need to be tailored to specific team requirements.
9. Issues of language and culture need careful consideration but should never be an excuse not to bring specific individuals into a team.
10. Every member of a virtual team should feel that they have gained from their participation the experience that is useful to their local situation and their personal career development.

Resources

Books

[The Challenger Launch Decision](#). Diane Vaughan, University of Chicago Press. 1996

[Culture.Com. Building Corporate Culture in the Connected Workplace](#). Peg Neuhauser, Ray Bender and Kirk Stromberg. Wiley. 2000

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[Walking Through Jelly. Language Proficiency, Emotions and Disrupted Collaboration in Global Work.](#) Tsedal Beyene, Pamela J. Hinds and Catherine Durnall Crampton. Harvard Business School Working Paper 09.138.

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[Virtual information training for a global business.](#) Bonnie Ranvild Frisendahl, Business Information Review 2014, Vol. 31(4) 237–242

[102 Tips for Online Meetings.](#) GoToMeeting

[The management of virtual teams and virtual meetings.](#) Martin White. Business Information Review 2014, Vol. 31(2) 111–117

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Appendix A. The Intranet Focus one-day virtual team training workshop

This workshop has been given at conferences in the EU and the USA and to individual organisations. The agenda given below is a starting point for a discussion with clients about their specific requirements.

9.30 – 10.15	<p>Introductions</p> <p>Stories from the front line</p> <p>Objectives for the day</p> <p>The benefits and challenges of virtual teams</p> <p>The three dimensions of virtuality</p> <ul style="list-style-type: none"> • Time • Location • Culture <p>The work of Geerte Hofstede and Richard Lewis</p> <p>The similarities and differences between virtual and physical teams</p>
10.15 – 10.45	<p>Leading a virtual team</p> <p>Leadership Style Inventory for managers</p> <p>Building the membership of a virtual team</p>
10.45 – 11.00	Break
11.00 – 11.30	Creating a virtual team member profile
11.30 – 11.45	Feedback from the workshop session
11.45 – 12.15	<p>Managing the technology</p> <p>Audio conferences</p> <p>Video conferences</p> <p>Meeting management applications</p> <p>The importance of a virtual team IT policy</p> <p>Managing the documentation</p>
12.15 – 12.30	Q&A
12.30 – 13.15	Lunch
13.15 – 13.30	The afternoon agenda
13.30 – 14.15	<p>Planning a virtual team meeting</p> <p>The importance of a virtual team protocol</p> <p>Creating and introducing a virtual team protocol</p>
14.15 – 15.00	<p>Working across cultural, organisational and language boundaries</p> <p>Language</p> <p>Organisational</p> <p>Cultural</p>
15.00 – 15.15	Break
15.15 – 15.45	<p>Training for virtual team members</p> <p>Evaluation of virtual meetings</p> <p>When things go wrong</p>
15.45 – 16.00	Final Q and A

