

## The Virtual Team: Strategies to Optimize Performance

by Lisa Kimball

Health care organizations have become more distributed across service delivery areas. Relationships between people inside a hospital and those previously considered outside (customers, suppliers, managers of other services, community members) are becoming more important.

Collaboration is the new watchword as organizations combine to provide integrated services. There is a new emphasis on knowledge management--harvesting the learning of the experience of members from all parts of the organization so that it is available to everyone. As a result of these changes, the key people you need to work with may be across town, across the region or even across the country (see Five Key Ways Teams Have Changed).

Many of these new teams are considered **virtual** teams because much or all of their communication takes place outside traditional face-to-face meetings via technologies such as e-mail or video conferencing. Although the technology that supports **virtual** teams gets most of the attention, managing a productive **virtual** team requires more than access to technology. To ensure effectiveness rather than frustration, the new team needs to employ new approaches to starting, building and managing itself.

### How to support the distributed team

Leading a **virtual** team requires more than working on the team's project agenda. Teams that are unable to meet in person frequently because members are distributed geographically need additional help to support their team process so that they can act and feel like a team. Here are five strategies team leaders can use to make a significant difference in team effectiveness.

1. Make the whole visible to everyone. One of the most difficult challenges for a distributed team is maintaining an image of itself as a whole. Yet working as a whole is what makes a team more than just a loose collection of related parts.

When a team is co-located, it develops a shared image of itself through experience--sitting in a conference room, meeting in someone's office, having lunch together. A distributed team lacks these images and needs other strategies to overcome fragmentation and create a sense of the whole. Here are a few:

- Make sure there is a team photograph and that everyone has a copy (if you can't take a team photo when you are together in person, make a collage out of pictures of all the individuals).
- Put it on something people are likely to keep in view (a mouse pad, a telephone contact list, a calendar).

- Distribute a map showing where each team member is located.
- Create a graphic that shows the name of each team member "sitting" at a place around a table (this generates a feeling of the whole better than seeing the names of team members in a list).

The goal is to make the whole team present in all the individual members of the team.

2. Provide a "line of sight." One of the most difficult things for distributed team members is their inability to "see" and feel what's happening above and around them in the organization. They don't have a "line of sight" to key parts of the system and so feel disconnected, and this reduces their effectiveness.

When teams are co-located, members often sit in on briefings, company announcements and meetings of related teams. In distributed teams, it's not unusual for the team manager to be the only one in regular contact with the team sponsor or other key players in the system and, therefore, the only one with a clear view.

This problem is exacerbated when there is a critical mass of members in one location and smaller groups elsewhere who tend to feel they are missing out on the action. Sending people copies of meeting minutes isn't adequate. They need the stories, the feel, the picture, the emotional tone--that is the essence of what they are missing. They need something that will function like a periscope, which allows people in a submarine to see above the surface of the water, or opera glasses, which let people in the balcony see facial expressions of people on stage.

Try strategies like these to provide a line of sight:

- Create "journalism" style (in contrast to "minutes") reports on meetings and publish to the rest of the team (including photos where possible).
- Encourage people to acknowledge who is missing in the room at the beginning of meetings and develop conscious strategies to connect distributed members to the process.
- Create a "**virtual** water cooler," a space in the electronic communication system for informal swapping of stories and feelings about what's happening as well as task-oriented messages.

3. Catalyze rich conversations. To realize the benefits of working as an aligned, interdependent system, teams need to have conversations that are diverse and complex, dealing with everything from key routines to major strategies. Collaboration can be thought of as a network of different conversations.

In a co-located group, an informal exchange may occur in the hall where critical information is passed along on the way to lunch, or a juicy dialog might be catalyzed by reading an evocative article, or great philosophical "over dinner" conversations may happen during off-site meetings.

A common problem for distributed teams is that their conversations deteriorate to logistical details, routine reports and administrative matters except during infrequent face-to-face meetings. This just doesn't provide the "juice" needed to support the essential creative energy of teamwork because in many cases these conversations are the only shared experience the team has for long periods of time.

It's critical to consciously create time and space for the team to have multiple, rich conversations between meetings. You need to find ways to use a range of communications technologies to support these conversations. You might, for instance:

- Hold periodic team telephone conferences described as "after dinner" talks--no administrative matters allowed.
- Rotate responsibility among team members to facilitate discussion on nonroutine topics (theories of marketing, regional culture) in an online environment on the intranet.
- Invite "experts" (authors, consultants, key people from other parts of the organization) to engage with the team.

4. Amplify energy. The best team experiences occur when you can really feel the energy of the team. It feels synergistic. It's exciting.

Think of a fantastic brainstorming session where the ideas are flowing and time just seems to fly by, or those occasions when a team member runs into the room to share the excitement of a new development, or the times when the team pitches in together on a tight deadline to work overtime until it's time to celebrate the accomplishment.

When a team meets in physical space, the room itself serves as a "container" that amplifies the energy of the team. At a great creative meeting it can feel like energy is bouncing off the walls and being absorbed by members of the team.

Distributed teams experience a kind of entropy effect where energy dissipates and drains out of the system because there is no container for it. It's critical to find ways to identify energy in the distributed team and make it available to the whole so they can feel it and build on it.

Here are a few ways to blow on the distributed embers of energy to help the whole team catch fire:

- Find ways to "spotlight" individuals or parts of the team where

something interesting is happening (initiate audio and video conferences from different places to feature different parts of the team).

- Develop a team norm of sending "hot news" bulletins to the team (and a norm to respond to provide reinforcement and support).
- Create ways to celebrate accomplishments as a whole team even when you aren't together.

5. Create tracks and footprints in physical space. Virtual teams can feel very vague and abstract, and this makes it hard for both team members and others in the organization to experience the team as "real" and important.

In a co-located team, the physical space and artifacts in it serve as reminders that the team exists: the names of everyone on inboxes, the corridor where everyone has their office (what does a **virtual** corridor look like?), the bulletin board with postcards from team members on vacation, the break room with shared coffee pot, coffee mugs from a conference everyone went to.

Without these, a distributed team can disappear off the radar screens of others in the organization and team members can lose a sense of themselves as part of the team. Lacking reminders, **virtual** team members can forget to tune into various team communication channels unless there is something pressing.

Artifacts give a **virtual** team visibility in physical space. They serve as an anchor to bring the team down to earth. Catching a glimpse of the team picture out of the corner of your eye, for example, is a subliminal reminder of the team's reality. To create artifacts for a **virtual** team, try these strategies:

- Create a sign or team inbox or some other signifier of the team--even where there is only a single team member--so it's visible to everyone in that environment.
- Especially at the beginning, circulate team "output" with some kind of team- specific headings and formatting. This puts it in a team context and conveys the sense that ideas are coming from the whole team rather than a single member.

### **Get the whole team involved**

These five strategies are not the lone responsibility of the team leader. If the whole team is involved in making these things happen, that not only distributes the work but makes it more likely that opportunities to support these strategies won't be missed.

One way of involving the team is to share the list of strategies and talk about which one or two would be worthwhile to work on for the next period of time (the next quarter, say, or between now and the next face-to-face team meeting). Develop a shared understanding

and an image of what it would feel like if the team were successful in implementing the strategy. Brainstorm a list of ways to achieve goals related to the selected strategy.

Be as concrete and specific as possible in identifying actions for team members and team leaders. Who will do what, and when and how will they do it? How will we know if it's working? What will we do if it's not working?

### **Connect the team with multiple media**

In addition to these five strategies, **virtual** teams can optimize their work together by learning how to use a variety of electronic communication media strategically. Most teams figure out how to talk about and negotiate their preferences around the use of different communications media: e-mail, telephone, voice mail. These preferences are based on a range of factors including habits, previous experience, working style, talent and ease of access.

But too many teams fail to consider the key qualities of different media in their choices about when and how to use the full range of communications channels available to them. It's not enough to find a comfort zone where team preferences overlap.

Teams who diversify their communications repertoire to use different media consciously to achieve different effects at different times will have a powerful advantage over those that simply use the medium that seems comfortable or quick. Consider media differences in terms of the degree to which a medium is personal, warm/cold, urgent, novel, fast/slow.

The team needs requisite variety, change modes for refreshment and impact. So experiment and pay attention to how different media impacts team dynamics (See Using Different Media to Support Team Dynamics).

### **A case example**

The work of a military health care team provides an example of how a diverse blend of expertise and the skillful use of media can enhance teamwork. When the U.S. Department of Defense began looking at how health care delivery might change in the future, planners decided to use a scenario process to develop alternative views of service delivery through the year 2020.

Instead of the typical process where a small group of planners meets and creates scenarios and plans, they wanted to involve a much broader cross section of people in the process. Project managers felt that new ideas would be both limited and less likely to be adopted if key people in all parts of the organization weren't part of the planning

process from the beginning.

The project, called Military Health Service Systems 2020 (MHSS 2020), involved military officials from each branch of the service, people from the Department of Veterans Affairs and experts from outside the military. But for budget, time and logistical reasons, it wasn't practical to plan on having several hundred people relocate to Washington, DC to work for months at a time to develop these scenarios.

So after launching the project with a large-group meeting, participants used The Meta Network, a Web-based conferencing environment built by Caucus Systems ([www.caucussystems.com](http://www.caucussystems.com)), to engage in a series of facilitated online conversations about different aspects of the scenarios and the implications for policy and implementation. Individuals could log on at any time from any place using a standard Web browser. In addition to interacting in dialog with others in the whole group and in subgroups focused on specific issues, they could also access background papers and drafts of the scenarios.

In this case, broad-based membership and optimal use of the Web to connect members clearly served to catalyze the team's conversations and amplify its energy. "MHSS 2020 was the most challenging and exciting project I have ever been involved with," says Colonel Ed Ponatoski, a member of the management team of the project. "Defense and medical experts, consultants and other people inside and outside the government worked together online on the Web in conversations to debate and decide the future of health care in the military. Using distributed teams let us pull in expertise from wherever it was located."

### **Avoid communication gaps**

If a team is co-located, problems caused by miscommunication can be resolved easily in person. If I send you an e-mail and you don't respond, I'm usually aware if it's because you are traveling. If you're around, it doesn't feel like a big deal to ask you about it when we run into each other in the hall.

In a distributed team, when I don't get a response from you to my e-mail, I am left to imagine a whole range of reasons: You're away from your computer and haven't received it. Something went wrong technically and you didn't actually receive it. You don't understand what I was trying to say. You think my message was really stupid and don't know how to tell me. You're angry at me for some reason I don't know. You wish I would stop bothering you with what you think are trivial matters. You're totally overloaded at the moment and just haven't gotten to it yet. You didn't think the message required (or merited) a response.

The tendency in people who are already feeling tenuous about their

relationship (something that is particularly true of a new, distributed team) is to assume the worst-case explanation and to be reluctant to pursue the issue for fear of appearing insecure or silly. Making a call or sending more messages to follow up feels less casual than initiating a face-to-face conversation, so individuals are less likely to do it and misunderstandings are left to fester and undermine the feelings of trust and security necessary to good team performance.

To avoid this kind of communication gap, make some agreements among team members about norms for response in various media (e-mail, phone messages, voice mail, fax)--both how the receipt of a message will be acknowledged and what you can expect from one another in terms of a response. And develop a system for alerting one another ahead of time if you will be disappearing from the communications grid for more than a day or two so everyone else will know what to expect.

If you can't respond substantively to a message right away, at least let people know immediately that you've received the message and when they can expect a response.

When team members are separated by distance and time, you can't afford to assume that team cohesion will develop on its own. There are too many obstacles. It requires conscious thought and effort by all team members, but the results can be powerful.

The new distributed teams offer the organization advantages that traditional co-located teams cannot match. The new teams can (1) develop and spread better practices faster across organizations; (2) connect "islands of knowledge" into self-organizing, knowledge-sharing networks of professional communities; (3) foster cross-functional and cross-divisional collaboration and (4) increase employees' abilities to initiate and contribute to projects across organizational boundaries. The extra effort to create a strong sense of "teamness" in distributed teams is clearly worth it.

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