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Effectively Managing a Virtual Workforce

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EFFECTIVELY MANAGING A
VIRTUAL WORKFORCE

by

Kirsten N. Suazo

A Research Project Presented in Partial Fulfillment
of the Requirement for the Degree
Master of Arts
Instructional Design

REGIS UNIVERSITY

May, 2006

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VIRTUAL WORKFORCE

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ABSTRACT

Effectively Managing a Remote Workforce

In today's fast paced, ever changing organizational environment, there is an elevated need for versatility and productivity in virtually every situation. With advanced technology, fluctuating customer needs, and volatile industry trends, an organization can find itself left behind the competition if it does not work smarter, faster, and leaner than others in the marketplace. In order to keep up with these demands, many organizations have abandoned the concept of traditional, on-site, office environments for those of virtual configuration, as they allow companies to operate with lower overhead costs, capitalize on geographically dispersed talent and provide flexibility in the services they offer.

The purpose of this project was to identify and evaluate a variety of leadership skills and techniques related to managing in a virtual environment in order to develop a training program that would assist managers and supervisors improve the effectiveness of their virtual teams and ultimately increase team performance, which positively impacts business results. Four fundamental categories of performance were explored: (1) building trust, (2) incorporating effective communication, (3) navigating cultural diversity, and (4) managing performance and accountability.

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Chapter 1

INTRODUCTION

Statement of the Problem

The purpose of this project was to identify and evaluate a variety of leadership skills and techniques related to managing in a virtual environment in order to develop a training program to assist managers and supervisors improve the effectiveness of their virtual teams in order to increase team performance, and ultimately, positively impact business results.

Subproblems

The First Subproblem

The first subproblem was to identify activities to aid in the development of trust between team leaders and team members despite the limitations of a virtual environment.

The Second Subproblem

The second subproblem was to develop strategies for implementing effective communication techniques among virtual team leaders and team members.

The Third Subproblem

The third subproblem was to construct effective practices for navigating the inherent cultural diversity of a virtual team on both a personal and professional level.

The Fourth Subproblem

The fourth subproblem was to establish methods for effectively managing the performance of virtual team members to ensure they are held accountable for their actions despite the absence of an on-site manager or supervisor.

Overview of the Problem

In today's fast paced, ever changing organizational environment, there is an elevated need for versatility and productivity in virtually every situation. With advanced technology, fluctuating customer needs, and volatile industry trends, an organization can find itself left behind the competition if it does not work smarter, faster, and leaner than others in the marketplace. In order to keep up with these demands, many organizations have abandoned the concept of traditional, on-site, office environments for those of virtual configuration.

Virtual teams allow companies to operate with lower overhead costs, capitalize on geographically dispersed talent and provide flexibility in the services they offer. One source estimates that 20 percent of the world's workforce will be working virtually by 2005 (Burtha, Connaughton, 2005) and The Gartner Group estimates that by 2008, 41 million employees will be working virtually at least one day per week, and nearly 100 million will do so at least one day per month (Right Management Group, 2005).

The audience for this project, a fast-paced, high volume telecommunication company, was no exception to the expanding list of organizations adopting the virtual workforce phenomenon. Unlike many companies who strategically incorporated the use of virtual teaming, however, the majority of those formed in this example occurred out of necessity, not out of desire, as a result of a merger between two distinct business entities.

Consequently, employees of the former adversarial, telecommunication companies were charged with unifying two distinct company philosophies and diverse collections of business methods and procedures in order to operate as one business unit. Shortly following the announcement, therefore, a massive corporate realignment and

reorganization commenced. This process, although still incomplete as of the date of this project, resulted in a large number of employees reporting to leadership who resided in various regions of the country and hence, virtual teams were formed. In many cases, this was the first exposure to virtual teaming for both the employee and the leader.

Several months beyond the onset of the merger process, business owners and corporate executives found that along with the many advantages of virtual teaming, came many disadvantages. It became apparent that in order to sustain an effective virtual team, that team also needed effective virtual leadership. Although many of the individuals who found themselves at the helm of a virtual team were experienced managers, they found that virtual leadership requires skills different than those needed to manage a conventional team. Lack of face-to-face interaction and interpersonal connection, varying cultural norms and diverse communication styles all contribute to the challenges of a virtual environment.

As team leaders across the country began to encounter the challenges associated with their new business environment, multiple requests for assistance surfaced. The purpose of this project, therefore, was to develop a training program to address some of the most common challenges being faced by the managers and supervisors of recently formed virtual teams and provide them with some proven tools and techniques to help lead those teams to an increase in performance and effectiveness.

Purpose of the Project

Needs Analysis

The request for training on virtual teaming was articulated as a *felt* need by multiple managers and supervisors within the organization. In order to confirm the need

and identify specific gaps in performance, a questionnaire on Virtual Leadership was distributed to a sample of employees who were currently functioning in a virtual leadership role. A copy of the questionnaire can be viewed in Appendix A.

The survey was distributed to 88 virtual leaders within the training organization of the target audience. Each of the recipients of the survey was confirmed, through the use of organizational charts posted in the company directory, to be functioning in a virtual leadership position during the time in which the survey was conducted. The survey was created using an online, interactive tool and distributed via e-mail. The responses were kept anonymous, and recipients were asked to participate on a voluntary basis. The response rate for the survey was 64%.

Of the 54 respondents, 40% had over ten years of leadership experience, yet only 6% had an equal amount of *virtual* leadership experience. The majority of the respondents, 31%, reported a virtual leadership experience range of 3-5 years; 17% reported a 1-3 year range; and 21% reported a range of less than one year. The size of the virtual team varied among respondents: the majority, 46%, reported a virtual team of 5-10 members; 37% reported 1-5 team members; 4% reported 10-15 team members; and 13% reported 15 or more team members.

Virtual leadership was deemed to be somewhat more challenging than leading a conventional team by 44% of respondents, while another 29% deem it to be much more challenging to do so. Additionally, 54% of respondents consider it critical to enhance the performance of their virtual team and another 40% consider it to be somewhat critical to do so. This confirmed the accuracy of the *felt* need for a training intervention related to virtual leadership.

The survey questions were written around the four major categories that the research on virtual leadership (e.g. Lipnack and Stamps, 1997; Fisher and Fisher, 1998; Bellingham, 2001; Right Management Consultants, 2005; Soles and Zeisler, 2005) has identified as being essential to achieving high performance and effectiveness in a virtual team environment: building trust, incorporating effective communication, navigating cultural diversity and managing performance and accountability. When asked to rank the level of challenge associated with each of the four identified categories from most challenging to least challenging, results were as follows:

1. Trust was rated as the most challenging by 36% of respondents
2. Navigating cultural differences was rated the second to most challenging by 40% of respondents
3. Managing performance and accountability was rated the third most challenging by 45% of respondents
4. Incorporating effective communication was rated fourth most challenging by 24% of respondents

The remaining survey results substantiate this order of ranking, with datum such as the following:

- 46% of respondents reported that their team had never participated in a structured team building session, an activity proven to be invaluable when establishing trust among virtual team members. Another 33% of respondents reported participating in only 1 structured team building session with their virtual teams.
- 46% of respondents reported meeting face-to-face with their virtual team members only once every 3-6 months while another 6% reported meeting with their virtual team members less than once per year. Furthermore, 40% of the written comments at the end of the survey indicated a lack of resources to initiate face-to-face meetings with virtual team members, which has presented a significant challenge in developing trust.
- 33% of respondents reported that they believe cultural issues within their virtual teams make it difficult for all team members to work together, and another 8%

strongly agreed to that being true, indicating that there is some difficulty with effectively navigating cultural diversity.

- Only 18% of respondents strongly agreed that they have specific strategies and methods for navigating cultural diversity among their team members, additionally, 20% disagreed to the statement and 6% strong disagreed, indicating there is an opportunity to increase effectiveness in the area of navigating cultural diversity.
- Only 19% of respondents reported that they receive very high levels of performance from their virtual team members, 60% reported high level of performance, and 21% reported average performance.
- When presented with the following statement: “I have been provided with the tools and techniques I need in order to effectively manage virtual team members who require corrective action” 41% of respondents reported disagreement while another 2% strongly disagreed with the statement, indicating there is an opportunity for an increased skill set in this area.
- 42% of respondents were either not sure, somewhat disagreed, or strongly disagreed that they have receive all of the support and/or tools they need in order to effectively lead their teams to high performance.
- 61% of respondents reported feeling that they share an above average or excellent amount of communication with their virtual teams.
- 73% of respondents report using e-mail as their primary mode of daily communication, indicating there is an opportunity to diversify communication methods.

Overall, the survey results confirmed the need for training in the realm of virtual leadership. The majority of the concern among respondents resided in the arena of building trust within a virtual team, which was in direct alignment with what other researchers found to be true among virtual leaders. Furthermore, many researchers (e.g. Lipnack and Stamps, 1997; Fisher and Fisher, 1998; Bellingham, 2001; Right Management Consultants, 2005; Soles and Zeisler, 2005) concluded that some of the concerns related to navigating cultural diversity and effectively managing performance

and accountability, which were revealed in this survey, could be effectively managed by establishing a foundation of trust within the team.

While respondents identified integrating effective communication skills as the area of least challenge, the survey results still indicated a gap in some aspects of the communication process. Specific examples of opportunity included the daily incorporation of a variety of communication methods and supplementing the lack of face-to-face interaction among team members with a more personal communication style than e-mail. Furthermore, 46% of respondents rated the amount of communication received from their virtual teams to be only sufficient and another 10% reported it as lacking. This indicated that while the majority of respondents perceived themselves to be above average in giving communication, there was a lack of two-way communication occurring.

Therefore, analysis of the survey has led to the conclusion that a training need did exist within the realm of increasing the effectiveness of virtual leadership. As a result, the recommendation was to move forward in an effort to identify the most appropriate intervention selection. A full report of the Virtual Leadership Questionnaire results can be viewed in Appendix B.

Goal Analysis

Aim

To increase the performance of virtual teams by providing managers and supervisors with the tools and techniques required to exhibit effective leadership skills in a virtual environment.

Goals

Goal number one. Managers and supervisors will be able to implement activities to engender trust with their teams despite the limitations of a virtual environment.

Goal number two. Virtual leaders will utilize effective communication techniques with their teams in order to increase effectiveness.

Goal number three. Virtual leaders will effectively identify cultural issues within their teams, and execute effective practices for navigating those differences on both a personal and professional level.

Goal number four. Managers and supervisors will incorporate methods for effectively managing the performance of their virtual team members to ensure they are held accountable for their actions despite the absence of on-site leadership.

Learner Analysis

Audience Definition

The audience for this project was the leadership staff of a fast-paced, high volume telecommunication company which is highly focused on accomplishing the corporate goal of delivering exceptional customer service, providing strong shareholder benefits and ensuring investor confidence.

The primary audience was composed supervisory and managerial professionals, ranging in age from the mid twenties to late fifties. The audience included male and female, multi-cultural and multi-lingual leaders of professional-level and above employees. The audience was geographically dispersed across the United States.

A secondary audience for this program was comprised of call center supervisors who manage non-exempt, technical and customer service center employees functioning

in a telecommuting work arrangement out of their homes. In this situation, the supervisor is responsible for managing 10-15 conventional, co-located team members along with 1-5 telecommuters, depending on the team specifications.

Specific Educational or Training Requirements

Prerequisites for attending the course on virtual leadership included: employment in a position that managed one or more direct reports, virtually; successful completion of the appropriate Initial Training Program(s) determined by the department in which the participant was employed; successful completion of the mandatory leadership development curriculum provided through the leadership program within the company's training organization.

Contextual Analysis

Orienting Context. The instruction needed to be job-specific and immediately applicable. Additionally, there was a need for the material to be championed by upper-management so that the participants had an avenue through which requests for assistance and support could be directed as the new tools and techniques were implemented.

Instructional Context. A soft-skills training room or conference room was required for the facilitation of the program. Ideally, the training environment should consist of three to four table pods and enough space for the participants to be able to move freely around the room while engaged in experiential, accelerated learning activities. In order to make use of appropriate visual aids, the room must be equipped with a desk-top computer, or lap-top connection capabilities, an in-Focus machine, and video screen.

Transfer Context. The instruction was designed so that participants are provided with multiple opportunities to practice the training tools and techniques and discuss on-the-job application in the training environment. This is accomplished through the incorporation of experiential learning activities, structured and spontaneous group discussion, and action planning and reflection assignments.

Subsequently, a request was made through the upper-management team to provide participants with an opportunity to apply newly acquired knowledge in a live environment immediately following the training. In addition to the use of the participant's direct supervisor as a support system, class time is dedicated to disseminate the contact information of the other course participants to all members of the class to be used as a newly formed network of virtual leaders.

Delimitations

The project did not address effective or ineffective behaviors for leading conventional, co-located teams.

The project did not attempt to define corrective action and/or disciplinary action techniques for managing sub-par employee performance in a virtual environment.

The project did not intend to be an all-inclusive portrayal of what makes an effective virtual leader. Rather, it identified a sampling of tools, techniques, and best-practices that applied specifically to the identified audience.

The project did not attempt to predict the success of the virtual leaders who attended the training program.

List of Definitions

Virtual Team. A virtual team is a group of people, including an established leader, who are geographically, culturally, and/or functionally diverse, do not frequently meet face-to-face, and rely primarily or exclusively on electronic forms of communication in order to work interdependently and collaboratively in an effort to reach a common set of goals.

Conventional Team. A conventional, or co-located, team is a group of people, including an established leader, who are within physical proximity and are organized to work together in order to accomplish a common task or goal.

Chapter 2

REVIEW OF LITERATURE

As modern corporations labor to keep up with the competition and to create a workplace that facilitates both quantity and quality, much focus has been placed on the development of leaders within the organizational structure. Because leaders are in a unique position to be able to influence both the performance of his or her employees and the decisions made by the organization, it is commonly believed that it is in the best interest of an organization to dedicate time toward the development of its leadership team. As a result, countless articles, books, seminars and educational programs have been published on the subject.

One specific cross-section of leaders that has received little consideration in the aforementioned publications yet has become increasingly prominent in recent years is that of virtual teams. Although the study of virtual leadership is relatively new in terms of leadership and management development, several trends for pursuing success and increasing performance can be identified. This chapter presents a review of related literature regarding the most commonly referenced theories, behaviors and practices for increasing one's effectiveness as the leader of a high-performance virtual team.

To place the project within the context of the relevant literature, the chapter begins with a succinct definition of a virtual team. This is followed by a review of those factors that contribute to a virtual team achieving high-performance. The next section will identify four fundamental categories of performance that, when implemented, create an environment for effective virtual leadership. The four topics are: (1) building trust, (2) incorporating effective communication, (3) navigating cultural diversity, and (4)

managing performance and accountability. Each topic contains its own set of related subtopics, which will be discussed as they present themselves within the appropriate area of the literature review. The chapter concludes with a summary of the topics discussed.

Definition of a Virtual Team

In order to truly understand the concept of a virtual team, it is critical to define what constitutes a team and what makes it virtual. Many of the definitions, such as those proposed by Gould (1997) and Soles and Zeisler (2005), identify geographic dispersion of team members as the key differentiator between a conventional, co-located team and a virtual one. According to Right Management Consultants (2005), the broad distribution of team members across cultures, or functional categories and the infrequent use of face-to-face meetings are also contributing factors. Bellingham (2001) goes on to state that virtual teams might also be comprised of team members from different disciplines, departments, or even different organizations.

Another essential aspect of virtual teams is their ability to make use of the features of an electronic environment. Burtha and Connaughton (2004) reference several methods of communication for use in virtual teams including, but not limited to: Web sites where team leaders and members can post “lessons learned”, internal electronic bulletin boards to be used as a medium for asking and answering questions as well as receiving suggestions from each other, and conference calls, e-mail, and videoconferencing tools to deliver both written and verbal communication which helps to satisfy the specific communication needs of each individual on the team.

These characteristics help to establish a group as virtual; however, they do not, necessarily constitute a team. In order to pinpoint the team aspect of the definition, there

must first be a clear delineation between a work team, and a work group. In the context of a corporate hierarchy, it is not uncommon for a group of employees to share the same leadership staff, be labeled as a team, and yet operate in an asynchronous manner. When this occurs, the geographic dispersion of team members is extraneous to the effectiveness of the team, and therefore, work groups that fall into this category must be eliminated from the classification of an authentic virtual team.

Hoefling (2001) identifies four basic criteria that a work group must meet to be considered a team: the group must have some charter for working together; they must be interdependent; committed to working together; and accountable as a unit to someone or something in the larger organization. Bellingham (2001) supports this position by proposing the following four criterion of a team: a common goal, team identity, interdependence, and a common set of norms.

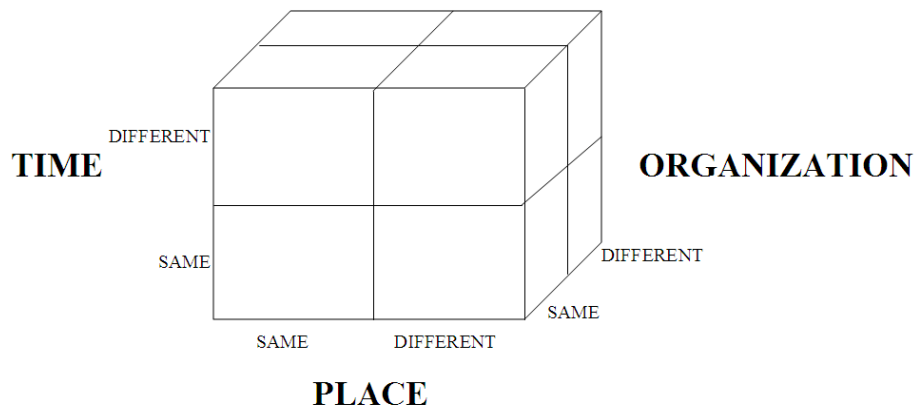
Therefore, in order to be categorized as a virtual team within the context of this project, the group must meet the abovementioned criteria in conjunction with a broad dispersion of geographic locations, cultural norms, functional diversity, etc. To help guide a manager's decision as to whether or not a work group should operate as a team, Hoefling (2001) offers the following questions as a guide:

- Can more than one person cooperating together do the work better?
- Are the members naturally interdependent? How interdependent?
- Can results and/or evaluation be group driven?
- Is the final output a combination of group and individual contributions?

Even with this criterion in place, virtual teams encompass a large variety of logistical and functional categories. In an effort to classify the most probable virtual

situations, Kimble, Li, and Barlow (2000) propose the following scheme based on eight possible scenarios (see Figure 2.1). In the first four scenarios team members work for the same organization, and in the other four they work for different organizations. Further classifications can be made on physical proximity and others are determined by work-cycle synchronicity.

Figure 2.1: A Classification of Virtual Teams



Stough, Eom, and Buckenmyer (2000), contend that, increasingly, data reveals that productivity, quality and morale improves when teaming is integrated into an organizational structure. They refer to Maier's (1967) study to provide a classic listing of the positive outcomes achieved by teams. Among these benefits are:

- Teams produce a greater quantity of ideas and information than individuals acting alone.
- Teams improve understanding and acceptance among individuals involved in the process.
- Teams create higher motivation and performance levels than individuals acting alone.
- Teams offset personal biases and blind spots that hinder the decision process
- Teams sponsor more innovative and risk-taking decision making.

In summary, a virtual team can be recapitulated as a group of people who are geographically, culturally, and/or functionally diverse and rely primarily or exclusively on electronic forms of communication in order to work interdependently and collaboratively in an effort to reach a common set of goals. With a working definition established, is important to next identify what constitutes a high-performance virtual team.

High-Performance Virtual Teams

According to Zeisler (Gordon, 2005), technology is neither the cause nor a solution for the problems faced by virtual teams. He states that for many reasons, one of which being stringent business demands caused by the 24-7 environment in which we live, attention to the process side of teamwork has been neglected. He maintains that in a virtual environment, people often lose sight of the fact that good work output depends on good work-process. Consequently, Soles and Zeisler (2005) maintain that a team's ability to perform at high levels hinges on how effective the group is at working through the classic stages of team development proposed by Bruce Tuckman (1965).

Tuckman's research reveals that groups go through four stages or progressions as they develop and mature as a team. These stages are: forming, storming, norming and performing (see Table 2.1). He proposed the model as a conceptualization of changes in group behavior, in both social and task realms and across all group settings over time. In other words, teams are formed to successfully complete a task, however, while they are working, they are simultaneously, and often through the same behaviors, relating to one another interpersonally (Tuckman, 1965). Therefore, in order to be effective, a team must

establish good work processes as recommended earlier by Zeisler (Gordon, 2005) in order to obtain high levels of performance in their work outputs.

Each stage of team development includes a variety of challenges for team members and their leaders, each of which must be dealt with successfully if the team will be capable of moving on to higher levels of performance. A summary of each stage follows:

Table 2.1: Stages of Group Development

	Group Structure The pattern of interpersonal relationships; the way members act and relate to one another.	Task Activity The content of interaction as related to the task at hand.
Forming Orientation, testing and dependence	Testing and dependence	Orientation to the task
Storming Resistance to group influence and task requirements	Intragroup conflict	Emotional response to task demands
Norming Openness to other group members	In-group feeling and cohesiveness develop; new standards evolve and new roles are adopted	Open exchange of relevant interpretations; intimate, personal opinions are expressed
Performing Constructive action	Roles become flexible and functional; structural issues have been resolved; structure can support task performance	Interpersonal structure becomes the tool of task activities; group energy is channeled into the task; solutions can emerge

The norming stage of team development produces an output that is vital to the success of a team from an interpersonal perspective, commitment. Numerous sources identify commitment to the organization and to individual team members as being critical to the satisfaction, success and high-performance of a team in a virtual environment.

Hoefling (2001) maintains that in order to become a virtual team in more than name only,

team members have to find synergies and effective communication methodologies. Research conducted for the Society of Human Resource Management Foundation concluded that a team's degree of task interdependence closely correlates with the degree of organizational commitment among team members. Therefore, in a virtual environment, the infrastructure should support frequent and ongoing interaction, collaboration and cooperation (Hoefling, 2001; Bishop & Scott, 1997).

Lipnack and Stamps (1997) corroborate these findings by asserting that there are three elements of virtual teams which allow them to effectively achieve their purpose: cooperative goals, interdependent tasks and concrete results. Their application of systems theory to virtual teams provides an effective framework for understanding the functions of working in a virtual environment. In this framework (see Table 2.2), *people* make up the virtual team, *purpose* is the task that holds the team together and *links* are the interactions and channels that connect and orchestrate them.

Table 2.2: Virtual Team System of Principles

	Inputs	Processes	Produced Outputs
People	Independent Members	Shared Leadership	Integrated Levels
Purpose	Cooperative Goals	Interdependent Tasks	Concrete Results
Links	Multiple Media	Boundary-crossing interactions	Trusting Relationships

As Table 2.2 illustrates, the inputs needed to develop virtual teams include independent members, cooperative goals, and multiple media. Throughout the development process, the members share leadership and engage in interdependent tasks, which involve boundary-crossing interactions. The generated outputs include integrated

levels of organizations, concrete results and trusting relationships (Lipnack and Stamps, 1997).

A 2005 study of over 200 virtual workers conducted by Right Management Consultants indicates that effective development and management of interpersonal accountability, communication, and cultural diversity are key differentiators between high and medium or low performance levels on virtual teams. The first of the seven conclusions drawn from the study is that attention to people can balance “virtualness.” Researcher’s analysis of the survey found that virtual teams need to compensate for the inherent lack of human contact in virtual teaming, finding appropriate ways to support team spirit, trust, and productivity (Right Management Consultants, 2005).

From the perspective of the individual contributors on a team, research has found that collectively oriented team members have very different impact on performance than egocentric team members. Collectively oriented individuals are more likely than their egocentric counterparts to improve their own performance and to enhance the performance of their teammates (Driskell and Salas, 1992; LaFasto & Larson, 2001). Commitment to the organization and to the other members of the team creates this environment of collectivity. Lack of commitment, therefore, leads to decreased levels of performance.

By and large, the research reviewed indicates that the primary differentiating factors between high-performance and average to low-performance teams is the group’s and leader’s ability to effectively develop and manage the interpersonal aspects of teaming. Bellingham (2001) supports this theory and proposes that high-performance teams:

- Clearly understand and are committed to a common goal
- Are creative, innovative and flexible
- Share an enthusiasm for working together
- Find that the group energy adds to the individual energy
- Are results-oriented
- Have clearly defined roles with good, clear communication
- Recognize the diversity and individual strengths of its members and utilize them to a positive advantage
- Are supportive of one another
- Deal with conflict through open communication based on mutual trust and respect
- Share leadership
- Evaluate the team performance to refine and make changes as needed

The remaining sections of this literature review will focus on the four fundamental categories of performance which have been identified as most crucial to the success of a team in a virtual environment: building trust, incorporating effective communication, navigating cultural diversity, and managing performance and accountability. The first three topics address matters in a social/interpersonal realm while the fourth addresses the task realm.

Four Fundamental Categories of Performance

Building Trust

The Importance of Trust in Teams

LaFasto and Larson (2001) propose that trust is essential to all levels of social transaction. Their 1989 study, which consisted of a three year examination of teams that achieved high performance and teams that proved unsuccessful, found trust to be

indispensable to success in a team environment. They observed trust to be the bond that allowed any kind of significant relationship to exist between people and noted that once broken it was not easily, if ever, recovered (LaFasto & Larson, 2001; 1989).

From the time of the aforementioned study, LaFasto and Larson have assessed more than 600 teams, the results of which have emphasized a close correlation between building trust and the need for team members to spend time together. This interaction, which occurs in the *forming* stage of team development includes time to come to know one another as people, to appreciate each other's capabilities, to understand the underlying motivations that might influence how decisions are made, to develop a common perspective on how problems should be approached, and how difficulties should be handled (LaFasto & Larson, 2001).

On a conventional team, this interaction is significantly supported by the physical proximity of the team members. In a virtual environment, however, opportunities for team members to get to know one another on and off the job, to see and read facial expressions and subtleties of body language, to observe the dynamics of the group, to understand and appreciate elements of cultural diversity among team members, and to develop communication skills that reflect and integrate all of these factors rarely, if ever, exist. Because these aspects of development and building trust contribute to a team's capacity to discuss and process ideas, surface solutions, settle disputes, make decisions, and get work done, they take on heightened relevance to the performance and success of teams in a virtual environment (Right Management Consultants, 2005).

Kimble et al. (2000) note that issues of trust and identify are crucial for the effective formation and functioning of virtual teams, stating that it is an important enabler

of cooperative human action. They go on to purport that without trust the management of a virtual organization cannot be conceived.

Trust is the heart of the matter. That seems obvious and trite yet most of our organizations tend to be arranged on the assumption that people cannot be trusted or relied on even in tiny matters . . . If we are to enjoy the efficiencies and other benefits of the virtual organization we will have to rediscover how to run organizations based more on trust than on control. Virtuality requires trust to make it work: Technology on its own is not enough (Handy, 1995).

Strategies to Engender Trust in a Virtual Environment

Build trust on both interpersonal and task levels. The Right Management

Consultants virtual leadership survey datum implicate that in a virtual environment, trust is likely to develop more readily at a task level than at an interpersonal level. This reaffirms other well-known research on the subject, such as the aforementioned work done by Bruce Tuckman (1965) which identified variances in team development on social/interpersonal and task realms. The study points out that both task accountability and interpersonal processes help to build trust on teams, and notes that the most successful teams and leaders work to cultivate both.

In other words, it is easier for most members of a virtual team to trust that a team member wants to get the job done and will do his or her part to complete the task than it is to trust the same team member to keep a confidence, treat others with respect, and value the diverse cultural perspectives of the team. The research, interviews, and focus groups conducted by Right Management Consultants indicate that a team's ability to build trust on an interpersonal level is most likely to develop when the following conditions exist on the team:

- Communication is truly open
- Teams meet face-to-face at least once

- Members feel empowered to make and act on decisions
- Conflicts are managed and not avoided
- The team leader models and reinforces these positive behaviors

Incorporate face-to-face events. Burtha and Connaughton (2004) maintain that despite the existence of mediated communication technologies, face-to-face communication is still critically important to achieving organizational outcomes, as it helps to build “environments”. As a result, they recommend that distanced leaders make conscious and strategic choices about initiating face-to-face-interaction and indicate that it is critically important to do so when the group is initially building the relationship.

The Right Management Consultants (2005) survey results suggests that any team with a long-term role and responsibility to the organization should consider at least an initial, if not periodic, use of face-to-face team meetings. Fifty-five percent of the survey respondents reported that they meet face-to-face with their team members one to two times a year, while thirty-six percent reported they had never met face-to-face. Analysis of the data revealed that those who did meet face-to-face performed better in several areas than those who did not. The areas of increased performance included the following: effective team leadership, managing multicultural diversity, and creative ideas and approaches.

It has been found that the very limitations of proximity and communication that characterize virtual teaming make it all the more critical for those teams to invest in face-to-face team building activities to strengthen performance and productivity. These sessions help team members get to know each other personally, strengthen working relationships, bridge culture gaps, and create team spirit and momentum that can greatly

enhance the effectiveness of the regularly scheduled virtual meetings (Right Management Consultants, 2005).

Encourage openness and supportiveness. Bellingham (2001) proposes that openness, acceptance and security create trust. He goes on to state that each member of a team has the ability to enhance or create barriers to trust within a group. In order to accomplish this in a virtual environment, he recommends that members of the group foster the following characteristics of the acronym TRUST in themselves and others:

- T** **Tolerance** – Accept the ideas of others with minimal criticism. If you disagree, keep your critique focused on the idea, not the person.
- R** **Responsibility** – Keep commitments and don't make promises you can't keep.
- U** **Understanding** – Allow for differences in others. Communicate clearly to ensure that others can understand your ideas. Be open to feedback and give support when needed.
- S** **Share ideas** – Be honest in your communication and include others.
- T** **Togetherness** – Don't create hidden agendas or cliques within the group. Spend time with team members when possible.

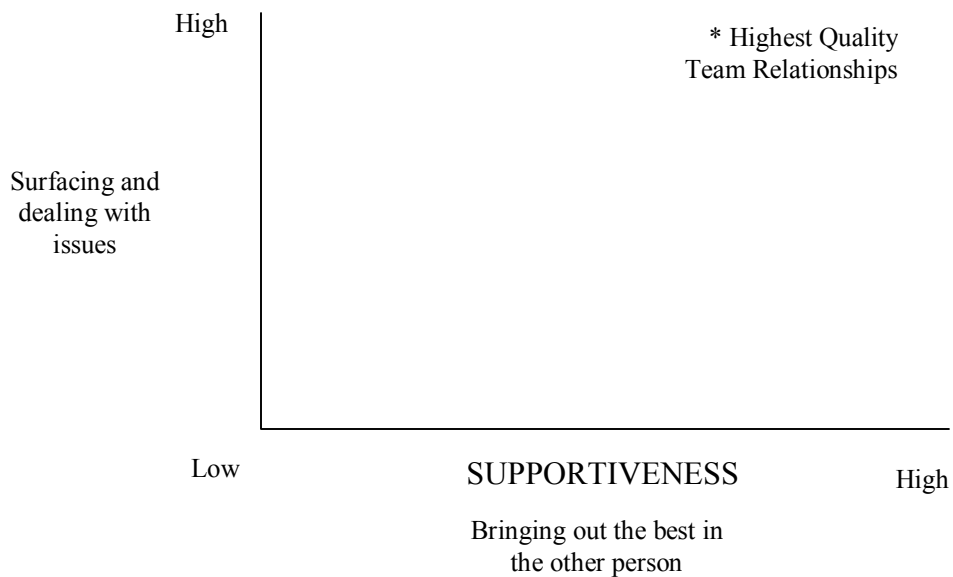
LaFasto and Larson (2001) performed a meta-analysis of empirical studies conducted during the past 20 years that measured quality, performance, or both in all types of relationships. The results of their meta-analysis identified two factors, openness and supportiveness, as being critical to the success of any relationship as measured by satisfaction with the relationship, accomplishment of the relationship's objectives, or both. These findings defend Bellingham's (2001) claim that openness, acceptance and security create trust.

In some of the studies in LaFasto and Larson's meta-analysis, openness is referred to as a willingness to communicate, some studies as communication frequency, and in

others as the ability to raise an issue. Some of the studies in the meta-analysis refer to supportiveness as acceptance of other people, other studies as the confirmation of the worth and value of others and, still others, as showing affection toward others. Despite the description, the meaning always focused on the deliberate attempt to treat other positively, to make them feel confident about themselves and to try to bring out the best in their abilities (LaFasto & Larson, 2001).

The two most important behaviors, according to these findings, for building and sustaining a collaborative team relationship are the synchronous presence of openness and supportiveness which can be illustrated by Figure 2.2.

Figure 2.2: Two Factors of Collaboration and Trust in a Team Environment



Release control and share leadership. In order for a leader to create an environment of trust within a virtual team, old paradigms of control and organizational structure must be relinquished. Virtual teams rely on employee empowerment rather than management control and direction (Geisler, 2002). Legnini (1999) asserts that virtual leaders cannot expect to solve all of a team's problems by themselves. In order to be

effective, they must realize that no one person can deal with the emerging and colliding tyrannies of speed, quality, customer satisfaction, innovation, diversity, and technology. They must surrender their egos, become confident enough in their vision to delegate responsibility and learn to effectively model the values they espouse.

This decline in traditional corporate hierarchical structure and the perceived loss of control in the eyes of many leaders of conventional teams contribute to the complexity of successfully leading a virtual team. As Lynn Newman, an associate professor of organizational studies at the California School of Professional Psychology in Los Angeles denotes, managers of a virtual environment have to trust that people will perform in the absence of direct supervision and team members have to develop trust using an assortment of media as a substitute for face-to-face interaction (Solomon, 2001). This is a clear paradigm shift on both accounts.

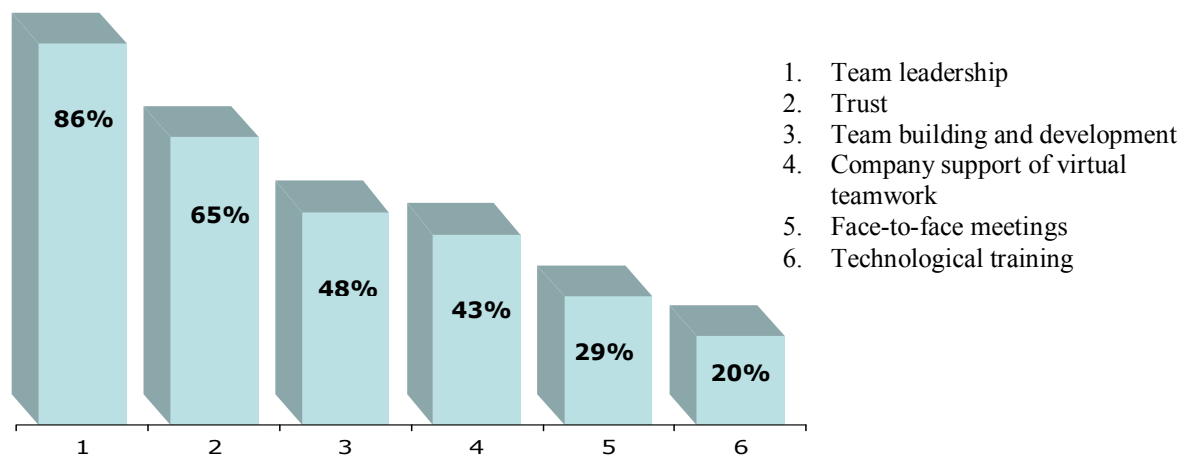
Warren Bennis contends that trust is the center of a successful virtual team leader and states that “Whips and chains are no longer an alternative. Leaders must learn how to change the nature of power and how it’s employed. . . If they don’t, technology will. . . Virtual leadership is about keeping everyone focused as old structures, including old hierarchies, crumble” (cited in Gould, 1997).

The item “New leadership talent emerges as necessary” was the leadership question included in the Right Management Consultants virtual leadership study that most related to distinguishing medium from low level performance in a virtual environment (Right Management Consultants, 2005). They go on to state that the designation of a single, permanent leader of a team may not always be the most effective leadership strategy in a virtual environment.

On the contrary, they conclude that the effective management of interpersonal, cultural and communication issues through the collective efforts and talents of the group might, in fact, increase the team's performance and contribute to the success of the team. The recommendation, therefore, is that of a rotational approach to the leadership position, a strategy they maintain is likely to add value to the team's performance (Right Management Consultants, 2005). Furthermore, self-managing teams are said to be the key to leaner and more flexible organizations capable of adjusting rapidly to changes in the environment and technology (Fisher & Fisher, 1998).

Conclusion. Trust has consistently emerged as one of the essential factors that impact virtual team performance. Right Management Consultant's 2005 online survey regarding the dimensions of team activity resulted in the prioritization (see Figure 2.3) of the factors that the respondents believed impacted virtual team performance and were essential to virtual team success.

Figure 2.3: Essential Factors to Virtual Team Success



Jarvenpa, Knoll & Leidner (cited in Platt & Page, 2001) summarize the significant variables that describe virtual teams who have developed trust as team members who:

- Volunteer for roles
- Exhibit individual initiative
- Deal decisively with free-riders
- Focus on results
- Shower other team members with encouragement and support
- Rotate leadership
- Spend considerable time discussing goals and time constraints
- Give substantial feedback toward improving content of colleague's work
- Exhibit empathetic task behavior

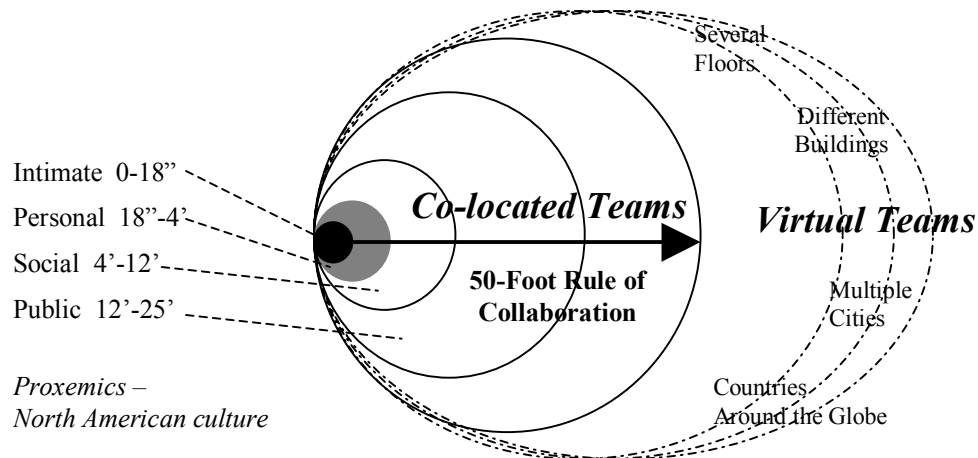
Incorporating Effective Communication

In the 1970's, MIT researcher Tom Allen conducted a study among groups of engineers which analyzed the probability of spontaneous communication between co-workers based on the distance between their workstations. He concluded that there was a dramatic decline in communication after about 50 feet of distance. Beyond that, Allen found that there was little difference in communication between team members who were on different floors of the same building and those who resided in different states, noting that the team members who worked in the same building were not significantly more likely to collaborate spontaneously despite physical proximity (Gordon, 2005).

When distances of 50 feet have this kind of impact (see Figure 2.4), the implications of managing communication ineffectively in a virtual environment where teams rarely, if ever, meet face-to-face is paramount. According to Hoefling (2001), virtual leaders have a responsibility to model and teach communication using the most appropriate media and forum for the situation. In order to be effective, she asserts that

virtual leaders match the medium and forum to the intention of the communication, noting that how people interact (how deeply, thoroughly, honestly, thoughtfully, quickly, slowly, patiently, individually, or collectively) is greatly influenced by medium, forum, and the audience involved in the communication.

Figure 2.4: Co-located to Virtual Distance



Furthermore, the informational access needs of co-located teams are very different than what virtual teams need in order to accomplish the same work. In other words, time and distance tend to put more emphasis on codification (Burtha & Connaughton, 2004). Therefore, it is critical in a virtual environment to establish and utilize effective communication which includes setting and clarifying goals, establishing agreed upon norms, balancing the frequency of communication, and selecting the appropriate technology.

Providing Clear Direction

Clarify goals. The first stage of team development, known as forming according to Tuckman's stages of group development model, deals largely with the socialization process. During this stage, orientation is accomplished through testing, which helps team members identify the boundaries of both interpersonal and task behaviors (Tuckman,

1965). The result of such testing and orientation results in the establishment of group goals and objectives which enables the group to gain clarity on what they are to do and how they will accomplish it. If they are successful in this stage of team development, Tuckman holds, they are more likely to reach high levels of performance in the areas of customer satisfaction, production and profitability (Soles & Zeisler, 2005).

Therefore, it is essential to the success of the team to clearly communicate the team goals during the forming stage, especially in a virtual environment where much of the natural testing and orienting processes are inhibited as a result of lack of face-to-face interaction. Whether they are referred to as missions, visions, strategies, objectives, etc., goals are a team's reason for existence and should be unmistakably and enthusiastically communicated. LaFasto and Larson (2001) maintain that goal clarity is critical for team members to have confidence in their direction and to be committed to making it happen. Clarity also drives alignment in team activities and trust in the team leader's ability to lead.

Fisher and Fisher (1998) support the prerequisite of goal clarity to virtual team success, stating that goals provide a clear focus for the day-to-day activities and serve as a practical arbitrator for the inevitable conflicts, trade-offs, and resource compromises the team is likely to encounter. Furthermore, an additional benefit to establishing clear goals in a virtual environment lies in the ability to use them as a substitute for hierarchy, allowing virtual teams to become self-directed if that structure is appropriate to the task.

Goal articulation and team support were two dimensions of leadership that revealed relatively high margins of difference between high and average performance teams in a 1996 study conducted by Judith Kolb. Both factors are mentioned, repeatedly,

in publications related to managing virtual teams (e.g., Fisher & Fisher, 1998; Lipnack & Stamps, 1997; Soles & Zeisler, 2005). The author of one such source recommends that in order to be effective, a team should establish five to seven *SMART* goals that will help establish direction and gauge productivity. *SMART* goals can be defined as: specific, measurable, achievable, realistic and timed (Bellingham, 2001).

As a final submission, Lipnack and Stamps (cited in Platt & Page, 2001) suggest that virtual employees and teams clearly identify the reason for their existence and translate their purpose into action steps that can then become the basis for the work they do together. Platt and Page (2001) go on to state that this activity will foster the team's ability to succinctly define their value-add to the organization, in view of the fact that cooperation, interdependence and concrete results are expected outcomes for virtual teams. Overall, the best predictor of virtual team success is the clarity of its purpose and the participatory process by which the group achieves it (Lipnack and Stamps, 1997).

Establish team norms. In order to effectively mediate potential conflicts and grievances, it is important for virtual team members to develop an established set of norms that will assist in the communication process. Recommendations for such norms include: collaboratively establishing ground rules for all methods of communication, creating specific protocol for meetings, e-mail systems, document maintenance, etc. and establishing processes and procedures to create visibility for key work components and documents in a project team work space or Web site (Burtha & Connaughton, 2004). By setting these expectations up front, virtual leaders are more likely to keep all members of his or her team on the same page, and as a result, limit feelings of isolation and neglect.

Bellingham (2001) describes norms as the accepted and rewarded behaviors of the team that help put values into action. He notes that norms are often referred to as “the way we do things around here.” Many sources (e.g. Parrish, 2003; Gordon, 2005; Burtha & Connaughton, 2004; Bellingham, 2001) reference frequently utilized norms which have proven to be effective for increasing communication effectiveness in a virtual environment. A partial list follows:

- Each communication must clarify whether the topic is for debate/decision or simply for information.
- An acceptable timeframe for response must be established for all modes of communication. For example: e-mail will be responded to within 24 hours, even if only to let team members know that the request is being worked on.
- Team databases should be checked and/or updated weekly.
- Team members must be aware of “upgrading” and “downgrading” communication. For example, responding to a phone call with an e-mail is regarded as downgrading the communication.
- Team members should be cognizant of the appropriate time to change communication methods. For example, knowing when it is time to place a phone call instead of sending another e-mail, etc.
- Communication should be open, honest, and direct.
- Each member should give and receive on-going feedback that helps to improve performance.
- Team members consider the recipient before communicating, including the other member’s location, time zone, ease of access to e-mail, cultural and personal sensitivities, etc. and to always assume positive intent.

In addition to an established set of norms, a virtual team must also engage in the creation of a communication infrastructure (Hoefling, 2001). The infrastructure should address issues related to how updates will be done, what information should be passed on, and what decisions should involve everyone. This tool can aid in maintaining rapport

and prevent trust from breaking down due to unintentional misunderstandings. The sample communication infrastructure in Table 2.3 outlines the recommended criteria of an effective plan. Regardless of the format employed, Hoefling (2001) cautions that communication should be: standardized, organized, timely, and easy.

Table 2.3: Virtual Communication Infrastructure

Who	Needs to Talk to/ Respond to Whom	About What	For What Purpose	Through What Medium/ Forum	In What Time Frame	How Often	Who Else Needs to Be Informed
	Manager						
	Team						
	Individual Team Members						
	Strategic Partners						
	Customers						
	Support Functions						
	Other Teams						
	Other Stakeholder						

Modes and Frequency of Communication

Frequency. While technological advances in communication open up previously unknown channels for sharing information and knowledge, they also pose the threat of unhelpful or unnecessary information clogging the system. What we have gained in our ability to transmit information, we have often lost in our capacity to receive and act on it (Fisher & Fisher, 1998). Parrish (2003) offers the following rule regarding a virtual manager's frequency and variation of communication methods: attempt to make one phone call per every ten e-mails, and one face-to-face meeting for every ten phone calls.

Gould (1997) recommends the following tips to help alleviate potential communication pitfalls in a virtual environment: include face-to-face time if at all possible to help establish ties and relationships among team members; provide members with a sense of how the overall project is going by e-mailing progress reports or posting updates on a team Web site, providing the big picture to all of the involved members; establish a code of conduct for responding to requests so that members do not feel as though they have been forgotten; don't let team members vanish by establishing a community calendar system to keep track of travel plans and vacation schedules; augment text-only communication with visual sources such as charts, pictures, or diagrams; and, finally, develop interpersonal and task based trust among members.

Furthermore, the number and frequency of one-on-one communication attempts from a virtual team leader, as opposed to "one-to-many" communication attempts such as chain e-mails, Web site posts, conference calls, videoconferences, etc. can influence a team member's perception regarding his or her importance within the team and level of respect earned from the virtual leader (Parrish, 2003).

Use of Technology. Managers of virtual teams have a huge array of technological tools at their disposal to create an integrated collaborative environment, including but not limited to: telephone calls, conference calls, e-mail, internet forums, Web sites, document sharing databases, communities of practice, videoconferencing, online net meetings, Webcasts, and virtual classrooms. How and when technology is utilized, however, can largely determine the success or failure of a virtual team. Managing the communication continuum is a critical aspect of managing the virtual team process. Knowing when the team needs to meet in person versus when the technology can be used to the greatest

advantage is the challenge for team leaders. Incorporation of voice, text, and audio into a team's regular communication patterns can help a virtual leader overcome the barriers of time, distance, and culture (Solomon, 2001).

Bellingham (2001) cautions that while technology enables communication in a virtual environment, there is still a need to balance the use of the technology with face-to-face communication. It is also important for virtual leaders to select the most appropriate technology for the intent of the communication, as too much technology can become cumbersome to maintain, resulting in what Hoefling (2001) refers to as "information obesity". This occurs largely due to the tendency of virtual team members to over-report as a strategy to feel connected and noticed. This is especially true, Hoefling notes, if trust is mediocre or when there is insufficient interaction among team members or between team members and the virtual leader.

Ultimately, the purpose of technology, as a means of communication in a virtual teaming environment, is to share ideas, transfer information, and build relationships in an effort to accomplish the task charged to the team. Michael Schrage states that "The real basic structure of the workplace is the relationship. Each relationship is itself part of a larger network of relationships. These relationships can be measured along all kinds of dimensions – from political to professional expertise. The fact is that work gets done through relationships" (cited in Kimball, 1997).

Lipnack and Stamps (1997) point out that while the team's purpose flows from abstract vision to concrete results, communication flows in the opposite direction, from the concrete tangibility of connections to the abstract intangibility of human bonds. They go on to state that the team's day-to-day, moment-to-moment interactions (processes) lie

between the physical connections (media) and human relationships, as is illustrated in table 2.4.

Table 2.4: Communication Links

Media	Interactions	Relationships
Technology		People
Medium	Process	Patterns
Physical	Observable	Experience
Data	Behavior	Learning
Nervous System	Thinking	Knowledge

In this premise, *media*, or technology provides a communication channel, not communication itself. It is passive in nature, exists separately from people or what they want to communicate and offers only the potential for communication. *Interactions*, alternatively, are processes of actual communication and cannot be separated from the people involved and how they interpret the experience. They are what make up the dynamics of groups and teams. Finally, *relationships* represent the cumulative effects of interactions and are the patterns that simplify the complexity of human interactions, the learning and emotions retained from the intensity of direct experience and fed back into future interactions.

Over time, relationships develop among people in a group because of their interactions with one another, eventually enabling them to become a team. In other words, according to Lipnack and Stamps (1997), *links* are the physical media, or technologies, that enable *interactions* which, in turn, spawn and maintain relationships. Therefore, it is critical for a virtual leader to select the most appropriate media, or

technology, to engender relationship building as it is, as previously discussed, what will ultimately ensure the team is productive and effective.

Conclusion

Bellingham (2001) holds that when effective communication is practiced within a team, trust levels go up, the members involve others in decision making, they demonstrate support of one another, they seek out multiple perspectives to aid in problem solving, and engage in giving and receiving constructive feedback. These qualities enhance collaboration which, subsequently, increases productivity and effectiveness on any team, but are particularly critical for virtual teams.

Navigating Cultural Diversity

Culture is all that which makes us who we are. It is created partially by genetic traits, nationality, ethnicity, morals, values, and those things intrinsic to an individual that establishes personality and influences behavior. Additionally, from a professional perspective, it includes communication norms, levels of formality, directness, status and the effects generated by the work environment. It is important to note that cultural diversity does not only apply to international, multi-cultural diversity, but also exists based on differences in team members who are separated on a state to state, city to city, building to building, department to department or individual to individual basis.

Culture is all encompassing and inseparable from one's being, therefore, it is impossible to ignore the impact it has on the dynamics of a team. Each of the aforementioned conditions will significantly affect relationship building, communication, levels of responsiveness (to both familiar and unfamiliar situations) and the way one chooses to cope with his or her surroundings in a team setting. A virtual environment

often heightens the challenges associated with cross-cultural differences due to the limited amount of face-to-face interaction and non-verbal communication which can help bring about intercultural sensitivity.

London (2002) points out that a diverse employee body is valuable for many reasons. It reflects the population, in which the company operates, provides better sensitivity to customers and suppliers, helps generate a diversity of ideas and perspectives, and aids in keeping the organization fresh and responsive. A lack of intercultural sensitivity, therefore, can be a significant barrier to taking advantage of the opportunities diversity presents, and can contribute to the inability of a team to achieve productivity and effectiveness.

Albert (1996) and London and Sessa (1999) propose that intercultural sensitivity is a multi-dimensional concept consisting of eight dimensions (cited in London, 2002): comfort with other cultures, positively evaluating other cultures, understanding cultural differences, feeling empathy for people in other cultures (being able to put oneself in their place) and valuing cultural differences, being open-minded, sharing cultural differences with others, seeking feedback about how one is received in other cultures, and adaptability. In order to cultivate an effective virtual team, therefore, a virtual leader must establish strategies for integrating cross-cultural appreciation and among his or her team members.

Cultural Appreciation

According to St. Amant (2001), in many cases of intercultural interaction, there is a sense of suspicion associated with “outsiders.” Therefore, he proposes that a virtual leader establish good working relations among intercultural team members early on in the

formation of the relationship by displaying an understanding of and an appreciation for the cultures with which he or she is dealing. Displaying appreciation for other team member's culture is important on two key levels. First, it creates a positive first impression regarding the climate of the new team, showing that the leader is willing to take responsibility and initiative as it relates to multi-cultural issues and displays objectivity by implying that he or she is open to working with individuals from other cultures. Second, it indicates a degree of commitment to the overall relationship by recognizing the value of cross-cultural perspectives on the team (St. Amant, 2001).

One practice suggested by Burtha and Connaughton (2004) to help virtual leaders initiate this first step is to actively take steps to make diverse team members feel comfortable and "at home" by learning the cultural norms of each team member. For international teams, this may involve learning about religious observances and national holidays, whereas, for team members that live in different areas of the same country, it might mean learning about common pastimes, culinary specialties, and other interests that are specific to that region. Further, for team members that reside in the same city, but in different office buildings, there may be different norms regarding dress codes, levels of formality, methods of socialization, communication, etc. that can provide insight to the way in which those individual prefer to be treated. By learning about things of this nature, a virtual leader not only has the ability to personalize his or her interaction with each member of the team, but also develops a better sense for the perspective from which each team member will approach a situation.

Many other sources (e.g. Bellingham, 2001; Soles and Zeisler, 2005; Parrish, 2003) suggest incorporating "getting to know one another sessions" during the *forming*

stage of virtual teams in order to allow for cultural exploration, which subsequently enable and foster appreciation of other cultural perspectives. These sessions are suggested to be more effective when done in a face-to-face environment, reinforcing, once again that any team with a long-term role and responsibility should consider at least an initial, if not periodic face-to-face team meeting (Right Management Consultants, 2005).

When dealing with cross-cultural individuals in a team setting, each member must make every effort to reach a balance between his or her own individuality and group orientation. Lipnack and Stamps (1997) point out that as a member of a team, people must simultaneously be “me,” an independent individual, and “we,” an interdependent part of a group. As a result, team members often struggle with an inevitable and continuous tension between the need to differentiate, or enhance their individuality, and simultaneously, the need to integrate, or bond into groups.

Therefore, while cultural sensitivity and appreciation on an individual basis must exist within the group, the team must also endeavor to generate its own collective, group culture which may ultimately supersede the cultural needs of the individual. Lipnack and Stamps (1997) denote that to be part of a team is to continuously work a dynamic tension deep in the heart of the human being.

Cross-Cultural Communication

The purpose of business communication is to exchange information. However, the way in which that information is presented can vary greatly between cultures, and such variations can cause confusion and frustration. One of the most prevalent problems related to intercultural information exchange involves directness or explicitness (St. Amant, 2001). For example, while some cultures prefer to get to the point quickly and

directly state the purpose of a message, others practice a more indirect, rhetorical approach in which the main point is slowly and perhaps never directly stated (Murdick, 1999 as cited in St. Amant, 2001). These differences can cause significant conflict among teams, causing suspicion among some team members, and possibly offending others.

Therefore, an understanding of how different cultures perceive and use directness and indirectness is essential to effective communication in the virtual office, and the areas in which such differences can cause the greatest problems (saying “no” and publicly expressing displeasure) both relate to the preservation of “face” or external public image. In cultures where directly saying “no” can result in the speaker or the recipient having a poor public image, “no” is often expressed indirectly. According to St. Amant (2001) this causes two kinds of intercultural communication problems. First, the recipient of the indirect response might not realize that such an answer means “no” and thus, might continue to wait for an answer that never comes, or mistakenly assume that a “yes” answer as given. Second, an individual from a more indirect culture might misinterpret an answer from a direct individual such as “I will have to get back to you” as meaning “no”.

Another source of intercultural misinterpretations surrounds the expression of displeasure or dissatisfaction. In an indirect culture, displeasure is often expressed through omission, whereas, a more direct culture will attack the situation in a somewhat confrontational manner (St. Amant, 2001). The latter, in many cases, becomes offensive to the indirect culture while the omission of displeasure often results in repeat offenses, creating a perception of intentional malevolence by the direct culture.

Another equally confusing and sometimes frustrating variance in cultural communication surrounds the aspect of formality. Ricard (1993) notes that an

individual's preferred level of formality can be recognized through his or her private and public behavior, patterns of dress, and use of social courtesies. An individual's use of directness, or indirectness might also be influenced by his or her culture's level of formality. For example, a culture's informality can be observed when its members address unfamiliar people by first name, wear jeans to the office, or overtly question people in positions of authority. While these behaviors are readily accepted in some cultures, others may be uncomfortable with them, and yet others might not be willing to tolerate them at all.

Ricard (1993) notes that it is important in cross-cultural environments for individuals to attempt to remain objective regarding the observable differences of team members, stating that they are often the focus of difficult intercultural interactions because they appear to be the "problem" when the "problem" is more frequently related to the attitude of the observer, not the action of the other team member.

In order to effectively manage situations of this nature, the need for cross-cultural communication sensitivity should be included in the creation of the team's norms and communication infrastructures. Understanding context-based differences can help individual team members avoid presenting too little or too much information and prevent incorrect assumptions about co-workers from other cultures.

Conclusion

Soles and Zeisler (2005) assert that diverse teams have been found to have a greater ability to solve problems and discover new solutions in order to succeed if they can find a way to harmonize and leverage their differences in perspectives, knowledge, and ideas without high degrees of conflict and breakdown. Ricard (1993) suggests the

following formula for balancing the cross-cultural communication process: attitudes help us decide to do something; having knowledge helps us know what to do; and having skills helps us do whatever we decide to do. Therefore, in a virtual team, members must be able to recognize their attitudes about the differences of his or her teammates, know, from the other person's cultural perspective what needs to be done about the difference, and then be equipped with the appropriate skills to effectively handle the situation. In other words, the key to achieving high performance in diverse teams is to move beyond a tolerance for differences and discover value in diversity (Soles and Zeisler, 2005).

Managing Performance and Accountability

In a conventional, co-located team environment, supervising and monitoring performance is often accomplished by walking around and personally checking on the activities of each team member. As Platt and Page (2001) indicate, however, for managers of virtual teams, "management by walking around" involves traveling to different buildings, cities, states, or perhaps even different countries in order to accomplish the same task.

Virtual team managers do not have the ability to be "everywhere at once," an ability the first-hand observation of far-flung team member's day-to-day operations would necessitate. Furthermore, project deadlines, limited resources, conflicting schedules, and budget restraints are but a few examples of common obstacles that hinder frequent on-site visits. Therefore, in order to be effective, virtual leaders must look to alternative methods of managing performance, disbanding the hierarchical interdependencies of conventional teams in order to enable them to evolve and learn to manage themselves (Platt and Page, 2001).

Defining Team Roles

Bellingham (2001) suggests that clearly defining the roles and responsibilities of each individual enables a team to know exactly what each member is expected to do in order to achieve their goals and objectives. By delineating roles, team members are also better equipped to provide appropriate levels of support to one another throughout the course of a project or task. Additionally, by sharing information and negotiating expectations, conflict can be reduced, or more easily resolved when differences in perception occur, making the performance management process more accurate and fair.

Lipnack and Stamps (1997) propose that to a significant degree, virtual teams are self-managing. To be successful in virtual groups, therefore, people must have much more independence and decision-making capability than people typically do in bureaucracies. People who form teams that cross boundaries need to know more, decide more, and do more. This is made possible by clear purpose and personal commitments together with open, accessible, comprehensive information environments.

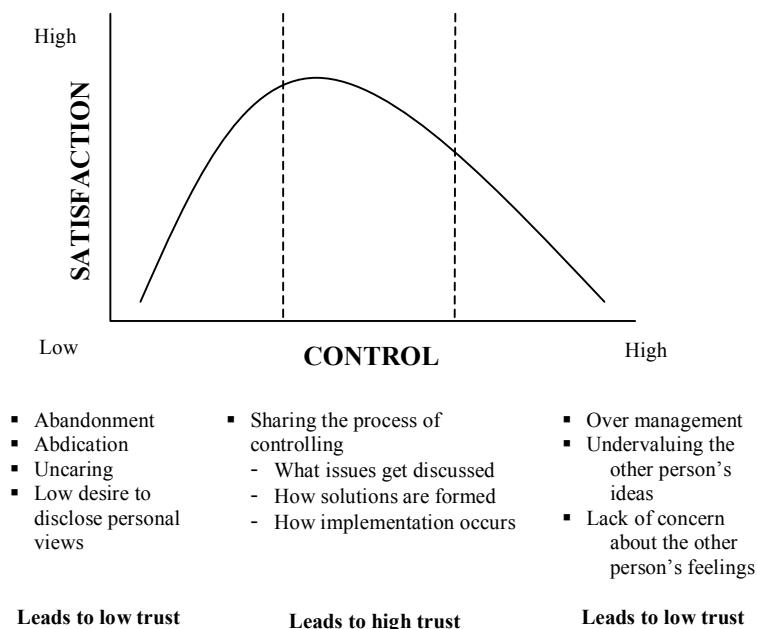
Crossman and Kelley (2004) contend that overlapping or ill-defined work roles within a virtual organization contribute to any perceived injustice by individual team members as it relates to management decisions, risk distribution and resource access. Furthermore, research conducted on team member participation in decision-making has indicated that perceived involvement in critical decisions, affects a worker's judgment of fairness, commitment to decision(s), and their sense of belonging (Amason 1993; Lind and Tyler 1988; Thibault and Walker 1975 cited in Crossman and Kelley, 2004).

It is a team leader's job, therefore, to clarify team roles and responsibilities in order to create coherence, align behaviors with rewards and recognitions, and identify

actual, perceived and potential conflicts in how team members might be asked to allocate their time. Maintaining ongoing contact is critical as the perceived priorities and responsibilities are likely to change with an evolving business environment (Burtha and Connaughton, 2004). Fisher and Fisher (1998) suggest team structures that involve rotated, shared, or distributed leadership responsibilities in order to create an environment of collaboration among virtual teams.

A virtual leader, therefore, should focus on balancing and sharing the control within their team because too little or too much control can lead to the same outcome, low satisfaction, as illustrated in Figure 2.4. On one extreme, demonstrating no desire to influence a decision can be perceived as abandonment, or lack of interest. Conversely, exerting too much control can be construed as over-managing, not caring what team members think, and not valuing the ideas of others (LaFasto and Larson, 2001).

Figure 2.4: Control and Relationship Satisfaction



Managing Conflict

While group processes and collaborative efforts are productive to team success, history, past practices, and competing organizational cultures, coupled with a fast-paced, ever-changing environment yields an atmosphere full of opportunities for team conflict. Fisher and Fisher (1998) point out that although conflict usually involves a certain amount of struggle, that struggle, if managed effectively, can be a source of strength and creativity for the team. They propose that conflict defines; it forces teams to examine their assumptions, ideas and solutions. However, if left unmanaged, or unresolved, conflict can become destructive, eroding the confidence and trust that are crucial to a team's ability to work together effectively.

According to Tuckman's research, the second stage of team development, after *norming*, is characterized by conflict and polarization around interpersonal issues with concomitant emotional responding in the task sphere. These behaviors serve as resistance to group influence and task requirements and may be labeled as *storming* (Tuckman, 1965). The model reveals, however, that it is a necessary and natural stage for team to go through if they are to ultimately achieve at higher levels.

Therefore, the challenge for managers is to anticipate the storming stage that will arise and plan ways to identify and resolve the conflicts so that they do not impede the development or performance of the team. Bellingham (2001) proposes that in order to manage and resolve conflict, team members must share a common set of agreements about working together on the issue, including the ability to:

- Listen openly
- Focus on the problem, not the individual

- Define the problem
- Allow anger to be expressed in an appropriate way
- Look at their contribution to the problem
- Change their behavior
- Commit to resolution

Soles and Zeisler (2005) claim that most managers and employees shy away from constructively dealing with conflict, hoping that it will resolve on its own. They go on to state that it is even easier to pretend conflict does not exist in a virtual environment due to the fact that body language clues are absent. Therefore, it is critical for a virtual leader to plan time in the early stage of team formation to discuss conflict and how the team will handle it when it arises in order to ensure healthy team development.

When conflict does arise, Soles and Zeisler (2005) offer the following discussion points to help drive conflict resolution in a collaborative manner among virtual team members:

- How is the team defining conflict? Is the conflict over a task or a relationship?
- What else does the team need to consider about contributing factors in conflict e.g., culture, personality, gender?
- What in the team's ground rules can help when conflict arises?
- Is the team using this help? Why? Why not? What are/have been the outcomes?
- What else can the team do to resolve disagreements?
- What can the team gain from resolving conflict/disagreements? Where else in the team's business practices can the ideas be applied?

Feedback

Feedback is valuable for a multitude of reasons. London (2002) points out that it: directs, motivates, rewards behavior, is the basis for development and career planning, contributes to building effective interpersonal relationships, is an important element in learning, conveys information about behaviors, provides insight about individuals and about the way the environment affects the stability and direction of career behavior, contributes to increased self-awareness and willingness to engage in self-assessment, and improves the organization's service quality and customer responsiveness.

According to LaFasto and Larson (2001), however, feedback is threatening. They contend that it is difficult to give well, and is hard to receive objectively. According to their research, the ability to give and receive feedback constructively is the greatest deficiency in relationships. This is disconcerting when one considers the importance of feedback in working relationships and the aforesaid benefits it can generate. Chaiken adds that good feedback is associated with a heightened sense of personal accountability, a wide range of worker satisfaction factors, and enhanced performance, especially in groups whose goals demand extensive interpersonal relationships (cited in LaFasto and Larson, 2001).

Giving feedback in a virtual environment is often thought to be a higher risk activity than in a conventional, co-located environment due to the fact that communication is primarily in writing. As a result, it is permanent and public which increases personal accountability because whatever is said is subject to greater scrutiny (Bellingham, 2001). Additionally, virtual team members must provide feedback with sensitivity to the fact that their written communication could be read out of context or

misinterpreted. Therefore, it is recommended that all feedback be given candidly for the sake of clarity, as opposed to in a sarcastic or facetious manner.

London (2002) proposes that in order for feedback to have a positive effect, it should be clear, specific, easily understood, and given frequently. Moreover, it should refer to elements of performance that contribute to task success and that are under the recipient's control, should be from a credible source, and accompanied by explanation so the recipient understands the source of the feedback and how it can be applied to improve task performance.

Fisher and Fisher (1998) suggest that there are three important points to consider when preparing to provide feedback: purpose, timing and place. First, they maintain that feedback has one of three purposes: *feedback to correct*, which helps a team member fix a problem or change behavior; *feedback to develop*, which is used when things are going well but there is potential for getting even better; and *feedback to reinforce*, which recognizes positive behavior or performance and encourages it to continue.

The second point is timing. As a general rule, they suggest that feedback is most effective when it is as immediate as possible, unless one or more of the people involved are angry or preoccupied with other issues, problems, or projects that might prevent them from focusing on the feedback, in which case, it is better to wait until a more appropriate time. Three good questions to ask when determining the proper time for providing feedback are:

- Will the person be receptive to my feedback?
- Do I have all the information I need?
- Is there still time for the person to act on my feedback?

The third point to consider when preparing to provide feedback is place, which largely depends on the nature of the feedback itself. If the purpose of the feedback is to correct or develop, it is best done in private in order to protect the esteem of the other individual and the confidentiality of the situation. Depending on the situation and the preference of the individuals involved, feedback to reinforce is sometimes appropriately done in public as is celebrating team and individual accomplishments as a means to reinforce behavior.

Fisher and Fisher (1998) go on to remind team members that feedback is a two-way process and, just as individuals have a responsibility to provide feedback to one another, they need to be skilled in receiving feedback from others. Lawrence and Wiswell (1995) identify three elements of two-way feedback that can streamline and optimize an otherwise distressing situation.

First, two-way feedback can be differentiated from one-way feedback through the occurrence of interaction within the exchange. They contend that in order to be effective, feedback must have specific goals and outcomes established and must engage the recipient in a dialogue to allow ideas and opinions to be expressed. It is only through this type of exchange that learning and perhaps a commitment to change can occur. Through their research, Lawrence and Wiswell identified three skills which they recommend for use in providing feedback: specificity, empathy, and inquiry.

Specificity involves one's ability to keep the feedback task or problem oriented. It should include details about the recipient's actions or behaviors and must include an explanation of the desired, or expected, action or behavior. Empathy reflects the human side of the process and allows the individual to view the situation from another's point of

view, thereby adding a dimension of trust to the exchange. Finally, and most importantly, is inquiry. Inquiry is the dimension that asks the receiver for his or her thoughts regarding the feedback that was given. It is this skill that begins the exchange of thoughts and feelings and is the point where learning and possibly a commitment for change can occur (Lawrence and Wiswell, 1995).

Conclusion

All tasks must be assigned and, subsequently effectively managed in the context of any team. In a virtual team, however, the following unique challenges presented by Bellingham (2001) may be associated with this responsibility:

- Evaluation is difficult because day-to-day performance is not observed.
- The person who leads the team may not be the boss.
- A person's role in a cross-functional team may not be the same as their job description.
- One person may be on five different teams at the same time.
- When a person has multiple bosses, all bosses tend to assume they have the person 100 percent.

Nonetheless, leaders must find strategies to manage performance accurately, fairly, equitably and consistently. Furthermore, team members must be held accountable for the tasks they have been assigned. Dziak (2001) recommends the following tips creating an effective virtual work environment:

- Establish the ground rules
- Be prepared to enforce the policy
- Practice effective meeting management
- Provide effective support

- Manage all direct reports by results

He goes on to suggest that managers break employee work into objectives, projects, tasks, and action items. Assigning, tracking, evaluating, and rewarding work outputs using these specifics dramatically improve a manager's knowledge of work activities, consistency in establishing expectations, and ability to objectively determine whether those expectations are being met.

Conclusion

In the coming decades, most people will work in virtual teams for at least some part of their jobs. Human beings have always functioned in face-to-face group settings. While the use of teams is on the rise, the face-to-face aspect of normal working relationships is changing dramatically. Electronic communication and digital technologies give people a historically unprecedented ability to work together at a distance, resulting in a powerful trend to team across organizational boundaries (Lipnack and Stamps, 1997).

Therefore, developing teams and teamwork will continue to be a major thrust for all organizations over a future planning horizon. Learning how to foster effective team processes, team roles, team leadership and good relationships among team members (as well as with management, clients, and suppliers) will continue to be a major organization management topic for some time (Stough et al., 2000).

Chapter 3

METHODOLOGY

The field of instructional design is associated with analyzing human performance problems systematically, identifying the root causes of those problems, considering various solutions to address the root causes, and implementing the solutions in ways designed to minimize the unintended consequences of corrective action (Rothwell, & Kazanas 1998). This chapter provides an overview of the instructional design methodology that will be used to implement this applied research project.

The first section of the chapter presents a rationale for the selection of a training intervention, as opposed to a non-instructional intervention alternative. This is followed by an overview of the design established for the project, including the instructional objectives and presentation strategies. Next, the instructional plan is described through a description of the intended delivery system and instructional strategies. The strategies selected for motivating adult learners is proposed next, and finally, the methods of evaluation are defined.

Intervention Selection

The intervention selection process was conducted through the use of the Human Performance Technology (HPT) model as described by Van Tiem, Moseley, and Dessinger (2004). Applying such a model to problem solving is the foundation of instructional design, as it is intended to provide labels to key factors involved in performance and clues to pinpointing underlying causes of human performance problems (Rothwell & Kazanas, 1998).

The first step of the model, identification of a performance gap, was initiated through a series of *felt* needs which were communicated to the training department by various representatives within the business. These felt needs were validated through a survey that was administered to all 88 of the virtual leaders within the company's training organization.

The training organization was selected as the sample audience to complete the survey for several reasons. First, the majority of teams within the organization meet the criterion of a virtual team discussed in chapter two. Next, the audience was easily accessible due to the researcher's employment within the organization. Finally, the organization is committed to performance improvement and as a result, a high response rate was expected.

A cause analysis, the second step of the HPT model, was completed using the Behavior Engineering Model Adaptation (see Table 3.1) presented by Van Tiem et al. (2004).

Table 3.1: Behavior Engineering Model Adaptation

Performance Drivers (or Causes)	Performance Questions	Performance Deficiency Examples
Data, information, feedback	How well are people given data, information and feedback to perform when they are needed?	<ul style="list-style-type: none"> ▪ Information not given on a timely basis ▪ Lack of feedback mechanisms ▪ Little documentation ▪ Performance standards are nonexistent ▪ Is data tied to performance?
Environment support, resources, tools	How well are people supported with resources, tool and equipment?	<ul style="list-style-type: none"> ▪ Ergonomic deficiencies ▪ Inadequate working conditions ▪ Tools unavailable or not optimally arranged ▪ Insufficient time to get things done

Consequences, incentives, rewards	How well do performers see the results or consequences of what they do? How well are they rewarded or provided with incentives?	<ul style="list-style-type: none"> ▪ Work unrelated to organization's mission and needs ▪ Rewards not performance-based ▪ Competing incentives ▪ Poor performance rewarded
Skills and knowledge	How well do performers' knowledge and skills match performance requirements?	<ul style="list-style-type: none"> ▪ Lack of knowledge, skills, training and education
Individual capacity	How well can people perform?	<ul style="list-style-type: none"> ▪ Lack of aptitude, ability, physical or manual dexterity ▪ Inadequate job analysis
Motivation and expectation	How well are people motivated to perform? Are expectations realistic?	<ul style="list-style-type: none"> ▪ Boring and punishing performance system ▪ Unrealistic payoffs


According to Gilbert's (1978) Behavior Engineering Model (see Table 3.2), the first three performance drivers, or causes, are rooted in the environment. As a result, data, instruments and incentives were ruled out as possible causes for this problem since sufficient evidence was available to prove that the environment did, in fact, support the practice of effective virtual leadership. The resources and tools needed to be effective were readily available throughout the organization, the consequences, incentives and rewards were in place to support performance, and multiple examples of effective virtual leaders within the parent organization could be identified.


Therefore, it was established that the cause resided in the latter three performance drivers, which according to Gilbert (1978) are rooted in the individual worker (see Table 3.2). It was quickly established that the target audience retained the capacity to perform in this function, as they were all experienced leaders of conventional teams. Furthermore, it was apparent through the analysis of survey results that the audience was motivated to

succeed. With virtual teaming emerging as a critical element to the success of their job functions, the individuals expressed a desire to increase the effectiveness of these skills. Therefore, it was determined that there was a lack of knowledge and skills in the realm of virtual leadership. It was confirmed through the company's catalog of training courses that virtual leadership skills were not included as a topic of training within the leadership development curriculum.

Table 3.2: Gilbert's Behavior Engineering Model

<i>Information</i>	<i>Instrumentation</i>	<i>Motivation</i>
<i>Data</i>	<i>Instruments</i>	<i>Incentives</i>
<ul style="list-style-type: none"> ▪ Relevant and frequent feedback ▪ Performance descriptions ▪ Clear and relevant guides to performance 	<ul style="list-style-type: none"> ▪ Tools and materials of work to match human factors 	<ul style="list-style-type: none"> ▪ Financial incentives ▪ Non-monetary incentives ▪ Career development opportunities
<i>Knowledge</i>	<i>Capacity</i>	<i>Motives</i>
<ul style="list-style-type: none"> ▪ Scientifically designed training 	<ul style="list-style-type: none"> ▪ Flexible scheduling of performance ▪ Prosthesis ▪ Physical shaping ▪ Adaptation ▪ Selection 	<ul style="list-style-type: none"> ▪ Assessment of motives to work ▪ Recruitment of the right people

 *Rooted in the Environment*

 *Rooted in the Individual Worker*

According to Van Tiem et al. (2004), instructional performance support interventions are appropriate when the problem is identified as a lack of knowledge or skill. They recommend the following list as possible options for instructional performance interventions: learning organizations, action learning, self-directed learning,

training, knowledge capture and management, education, and the interactive technologies of distance learning, telecommunication, and satellite technology.

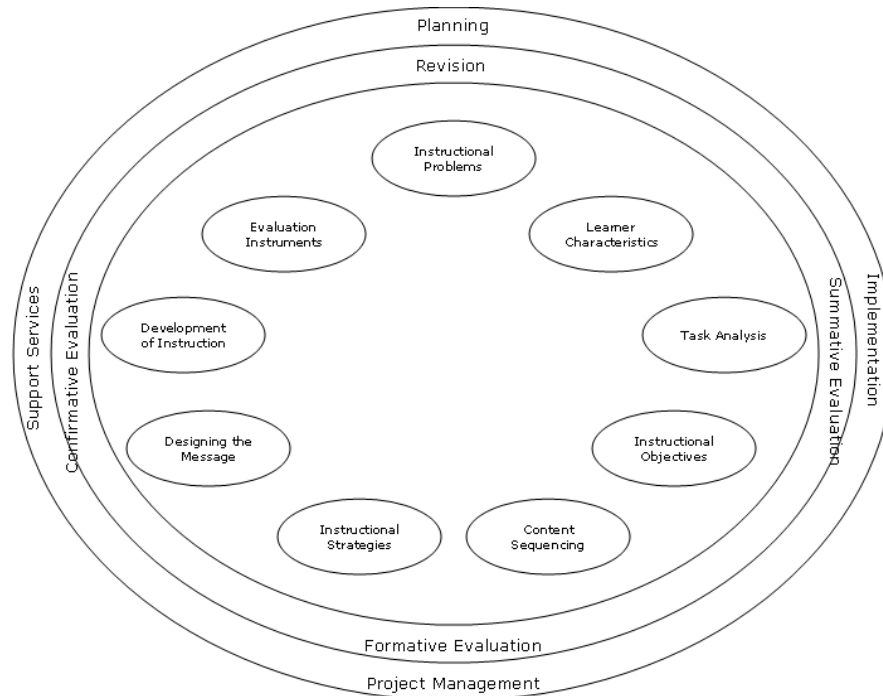
Training was selected as the most appropriate, timely, and cost-effective intervention for this project due to the potential impact the performance gap could have on the overall success of the business. Van Tiem et al. (2004) describe training as instructional experiences provided by employers for employees which are expected to be applied on the job immediately or soon after the training episode. Moreover, training sessions deal with what employees need to know and/or what they need to do to perform a job function with a high degree of competency and typically address attitudes as well as behaviors.

In order to develop a training program on the topic of virtual leadership, the instructional design model developed by Morrison, Ross, and Kemp (2004) will be utilized (see Figure 3.1). Morrison et al. propose that there are nine elements in a comprehensive instructional design plan. They maintain that an instructional designer must:

1. Identify instructional problems and specify goals for designing an instructional program.
2. Examine learner characteristics that will influence instructional decisions.
3. Identify subject content, and analyze task components related to stated goals and purposes.
4. Specify the instructional objectives.
5. Sequence content within each instructional unit for logical learning.
6. Design instructional strategies so that each learner can master the objectives.
7. Plan the instructional message and develop the instruction.

8. Develop evaluation instruments to assess objectives.
9. Select resources to support instruction and learning activities.

Figure 3.1: Morrison, Ross, and Kemp Instructional Design Model



The remaining sections of this chapter will outline the processes of this model that were implemented to develop an instructor led training course on the aspects of increasing one's ability to effectively lead a virtual team.

Instructional Objectives and Presentation Strategies

Objective One - Concept-Application

The participants will be able to identify a number of the common challenges and frustrations associated with the virtual teaming and virtual leadership processes.

Initial Presentation. The participants will be divided into groups of five and be given the opportunity to participate in an experiential learning activity that simulates working in a virtual environment.

Generative Strategy. The objective of the activity is for the group to work together as a team in order to build a paper airplane. The groups are geographically dispersed throughout the activity and each team member has strategically been given very limited information to contribute to the process. In order to be successful, they must develop strategies to work effectively in a virtual environment and accomplish the task within the specified timeframes.

Assessment Strategy. Upon completion of the activity, the participants will be brought back together to present their finished products. In order to be considered successful, the team's airplane must be built according to the specifications included in the instruction packet.

Once each team's work has been presented, the activity will be discussed with debrief questions designed to address both the task and interpersonal levels of the interaction. The participant's responses will be captured on chart paper, producing a list of challenges and frustrations associated with the virtual teaming process.

Objective Two - Fact-Recall

By participating in class lecture and discussion, the participants will be able to accurately define a virtual team and effectively differentiate between virtual and conventional teams, as well as between work teams and work groups.

Initial Presentation. The facilitator will lead a class tutorial which will succinctly define a virtual team.

Generative Strategy. Throughout the tutorial, the participants will be encouraged to offer their opinions, insights, and relevant experiences. Upon completion of the tutorial, the participants will be given the opportunity to assess their own work groups to

determine if it meets the criterion of a virtual team. A discussion among table group members about this evaluation process will ensue.

Assessment Strategy. As the participants are working, the facilitator will walk around to each table group to take note of the conversations, answer questions, provide insight, and course correct as necessary.

Objective Three - Concept Application

By completing a virtual leadership readiness self-assessment, the participants will be able to assess their current capabilities as an effective virtual leader.

Initial Presentation. The facilitator will provide each participant with a virtual leadership readiness self-assessment and will walk-through the directions needed to complete the assessment.

Generative Strategy. The participants will be given time to work, individually, to complete the virtual leadership readiness self-assessment. Upon completion of the assessment, the facilitator will lead a discussion regarding the interpretation of the assessment results.

Assessment Strategy. The participants will be given an opportunity to discuss the results of the self-assessment with the other members of their table groups and to create an action plan documenting what he or she will begin doing, or stop doing as a result of the insight gained from the assessment.

Objective Four - Fact-Recall

By participating in a class lecture and large group activity the participants will be able to list and describe the four fundamental categories of challenge most commonly related to virtual leadership.

Initial Presentation. The facilitator will present and explain the four fundamental categories of virtual leadership challenges.

Generative Strategy. Upon participating in the class tutorial and asking questions to clarify understanding, the participants will be divided into four groups, one for each challenge, and be given the opportunity to work together to categorize the challenges they listed on chart paper at the beginning of class into the appropriate category of virtual leadership challenge.

Assessment Strategy. Once the groups have categorized all of the challenges from the chart paper, a representative from each group will present their list to the larger group and explain why that particular challenge was placed into their category. If the same challenge appears on more than one chart, the facilitator will lead a large group discussion to determine where the challenge belongs, or, to discuss why the challenge is appropriate in more than one category.

Objective Five - Procedure Application

Upon completion of the class, participants will be able to implement a number of appropriate tools and techniques that will increase their effectiveness as a virtual leader and aid in their ability to increase the performance of their virtual teams.

Initial Presentation. Through a series of lecturates and group activities, the facilitator will present a battery of tools and techniques that will aid in the participant's ability to increase their effectiveness as a virtual leader.

Generative Strategy. The participants will participate in a number of individual and group activities which will illustrate the use of the tools and techniques presented in the class.

Assessment Strategy. Throughout the individual and group work sessions, the facilitator will walk around to each table group to observe the participant's work, answer questions, and course correct as necessary. At the completion of each activity, the participant will be given an opportunity to action plan and document best practices that can be utilized back on the job.

Instructional Plan

Instructional Delivery System

The delivery was designed in an instructor-led, classroom format which engenders an accelerated learning environment. Accelerated Learning (A.L.) is an integrated philosophy of learning that de-mechanizes and re-humanizes learning and puts the learner, not the teacher, the materials or presentations, at the center of the learning process. It is founded on the following guiding principles (Meier, 2000):

- Learning involves the whole mind and body.
- Learning is creation, not consumption.
- Collaboration aids learning.
- Learning takes place on many levels simultaneously.
- Learning comes from doing the work itself (with feedback).
- Positive emotions greatly improve learning.
- The image brain absorbs information instantly and automatically.

With these principles in mind, the learning environment for this course was developed as one of collaboration and participation. The activities were strategically created to invoke learning on all levels, a concept effectively described through Meier's (2000) acronym for SAVI learning:

1. Somatic: Learning by moving and doing
2. Auditory: Learning by talking and hearing
3. Visual: Learning by observing and picturing
4. Intellectual: Learning by problem solving and reflecting

Careful consideration was given to the selection of activities in an effort to strike a balance between active and passive learning approaches. For example, whenever possible, an auditory presentation is immediately followed by a somatic or intellectual activity that allows the participants to take action, move around the classroom, reflect and share experiences with other class members in order to more effectively comprehend the content.

Senior Training Specialists who are qualified to teach leadership and development courses are the intended facilitators for the course. The course is an instructor-led classroom-based course which can be supplemented by face-to-face and electronic networks of resources outside of the class.

Instructional Strategies

Behavioral objectives have been used at the beginning of each module to succinctly describe what the learner will be able to demonstrate at the completion of the course. The objective statements are clear, concise and limited in number to reduce the strain on the participant's working memory.

A short overview has been included at the beginning of each module to give the participant a high level view of what material will be covered in the module. The overview introduces the module and tells the participant how the content will help increase effectiveness in their daily job performance.

The material is sequenced according to a *concept-related* scheme which, according to Posner and Strike (1976), is a manner consistent with how we organize the world conceptually or logically (Morrison, et al., 2004). First, *propositional relations* were considered which prescribes teaching the relationship between propositions before teaching the proposition. In this course, concepts of virtual teaming will be set within the context of the theories associated with leading a conventional team as the participants of the course already have experience in this realm of leadership. As a result, the learner can progress from the “known” to the “unknown” and make the appropriate links between the two.

Second, the material has been sequenced according to *content sophistication* which examines the continuums of concrete to abstract and simple to complex (Morrison, et al., 2004). This prescription permits the content to start with tangible, straightforward and precise concepts and then proceeds to more theoretical, intricate, and imprecise concepts associated with leading teams in a virtual environment. For example, a discussion regarding trust building in a face-to-face environment will occur before discussing strategies to build the same level of interpersonal trust using only technological avenues.

Strategies for Motivating Learners

Creating an environment in which participants can be intrinsically motivated to learn is essential to the success of any training program. In fact, it has been observed that when two people of identical ability are given the identical opportunity and conditions to achieve, a motivated person will surpass an unmotivated person in performance and outcome. Therefore, an effort must be made to foster motivation at every stage of

instruction by including motivational conditions of inclusion, attitude, meaning, and competence (Wlodkowski, 1999).

Several elements from Wlodkowski's (1999) Motivational Strategies were incorporated into the instruction of this training course. The experiential learning activity at the beginning of the course has been designed to engender an awareness and feeling of connection, as well as to create a climate of respect among the learners. It provides an opportunity for the participants to use collaborative and cooperative learning (Strategy 5), provides an opportunity for multidimensional sharing (Strategy 2), and emphasizes the purpose of what is being learned and its relationship to the participant's personal situations (Strategy 7).

In an effort to help the participant's build a positive attitude toward the subject matter, the facilitator will encourage the sharing of past knowledge and experience regarding virtual leadership in order to eliminate or minimize negative conditions surrounding the subject matter (Strategy 14). This also provides an opportunity to confront erroneous beliefs, expectations and assumptions that may underlie a negative learner attitude (Strategy 16). Furthermore, throughout the session, the benefits of learning the material will be emphasized to the participants, which will help solidify the value of the material (Strategy 37).

In order to enhance meaning and maintain the learner's attention, relevant and intriguing problems will be introduced through the use of job-specific case studies in order to facilitate learning (Strategies 43, 44, and 46). Throughout course discussion, especially as it relates to past experiences, the facilitator will insert humor when appropriate, and use critical questions to stimulate learner engagement and challenge

(Strategies 38 and 42). These questions also stimulate learner's recall of prior knowledge. By providing realistic case study scenarios, the participants have an opportunity to enhance their critical thinking skills as it relates to leading teams in a virtual environment.

The virtual leadership readiness self-assessment is used to provide the learners with the opportunity to construct relevant insights and connections to their current situations (Strategy 54), and the use of action planning sessions within the classroom allows the participants to know that they can proficiently apply what they are learning to their real life situations (Strategy 51).

Motivating participants upfront is a very important part of making an instructional plan work (Wlodkowski, 1998). In order for the content of instruction to impact business results, however, the participants must also be capable of applying what has been learned back on the job. Caffarella (2002) identifies four key transfer-of-learning or application strategies: (1) use active learning techniques that enhance transfer (for example, critical reflection, developing action or learning plans); (2) incorporate having learners try out their new skills in either their own or similar settings; (3) provide learners opportunities to develop specific application plans; and (4) ensure assistance is given for learning transfer (for example, coaching, refresher courses, mentoring).

Each of these aspects of *far transfer* (the successful application of learning to a more remote context or a novel situation) has been incorporated into the instructional design in an effort to make the course as effective as possible. By embracing and applying the content learned in this course, the participants will be equipped to enhance

their effectiveness as virtual leaders and, as a result, increase the likelihood of higher team performance.

Chapter 4

RESULTS

Participant Guide

The Participant Guide was designed in a workbook format to be used in an interactive manner throughout the course. While some text is presented in order to guide the learning activities and help accurately capture some of the more specific details of the content, the majority of the pages have been formatted with lines and spaces in which the participants can capture their own opinions, ideas, and action plans as they relate to the topic being discussed. By allowing the participants to capture this information in their own words, and identify examples that are relevant to their own jobs, they are more likely to transfer the content back to the workplace.

A brief overview is used at the beginning of each new topic in order to introduce the participants to the central themes included in that section. A comparative advanced organizer schema had been used throughout the course, as the participants are experienced leaders and, therefore, the new content can be effectively compared with what the learners already know. As a result, many of the activities, which are described in detail in the Facilitator Guide, focus on sharing existing knowledge and creating situations in which new knowledge can be created within the large and small group interactions.

Two levels of headings have been used to organize the material in the Participant Guide. The first heading level introduces a main topic, such as: Fundamental Organizational Dynamics for Effective Virtual Teams. The second level introduces the subtopics that are discussed within the main heading, such as: Building Trust,

Incorporating Effective Communication, etc. This creates an explicit signal, one that Meyer (1985 as cited in Van Tiem et. al., 2004) refers to as *pointer words*, which alerts the participant as to what can be expected from the section.

Simultaneously, these headers provide typographical signals that assist in structuring the content so as not to put too much strain on the learner's working memory. In this guide, the first level headings have been created in 16 point, bold font, while the second level headings have been created in 14 point, bold font. For the purpose of reducing disorder, not all second level headings have been included in the table of contents.

Pictures and graphic representations of models and theoretical frameworks have been used intermittently throughout the participant guide. Great care was given to incorporate pictures with a variety of different functions, based on Levin's (1981 as cited in Van Tiem et. al., 2004) list of the five different learning functions that pictures can provide in text. Some of the pictures used were incorporated to serve simply as *decoration*. They have been strategically arranged in order to balance, or, in some cases, break up the page, as a full page of text can be threatening to the reader. While these pictures may have no direct connection to the text, often times, they can serve as a source of motivation for the reader.

A number of the graphics were included as *representational*, as they illustrate a portion of the significant textual information. Still others have been used for the purposes providing an *interpretation* of the material, which adds comprehensibility of the content by providing a visual interpretation. Finally, one of the graphics was selected to serve as

a mnemonic learning aid, performing a *transformation* function. This type of visual aide can assist the learner in recalling the steps, or details, of an otherwise abstract idea.

Overall, the participant guide was designed in an effort to reduce the extraneous cognitive load imposed on the learner. Based on the high level of interactivity between the elements of the modules, the material lends itself to high levels of cognitive load which can negatively impact the learning process. In order to minimize this load, topics were arranged in a simple-to-complex sequence, which not only reduces, but optimizes cognitive load since the activities are challenging, but yet, exciting, relevant and not overly demanding on cognitive capacities.

Effectively Managing a Virtual Workforce

Participant Guide

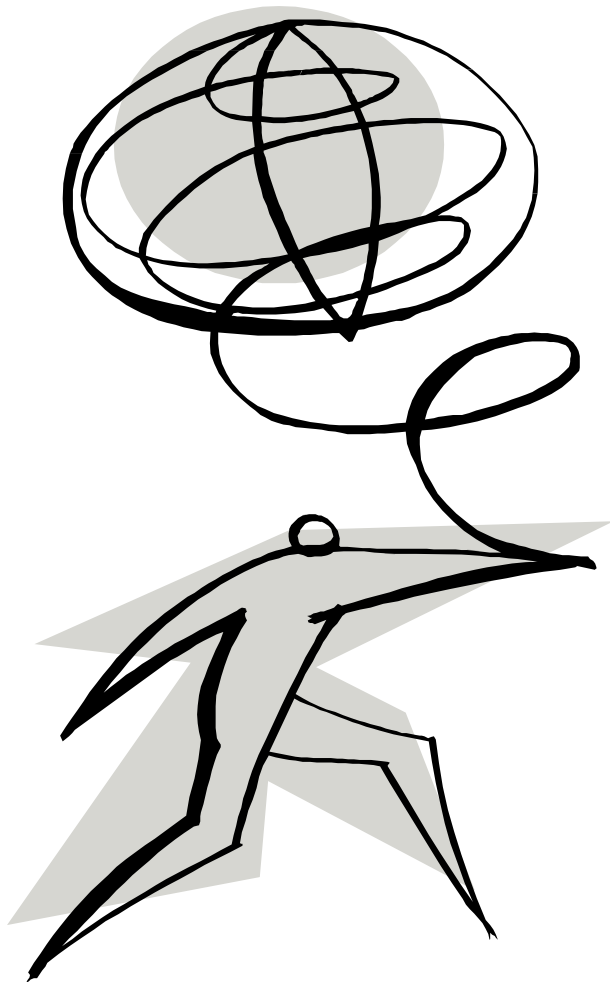


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Activity – ABC Aerospace Corporation

How well do you perform in a virtual environment? What are some of the challenges and frustrations associated with working on a virtual team, or as a virtual leader?

Think about the ABC Aerospace Corporation activity and record your feelings about the process.

Things That Worked Well	Things That Could Have Been Improved

Course Introduction

Outcome

Effectively Managing a Virtual Workforce is an introductory course that will assist you in increasing the effectiveness of your virtual team through the implementation of proven virtual leadership skills.

The outcome of this course is to address some of the most common challenges being faced by managers and supervisors of virtual teams and provide some proven tools and techniques to help lead those teams to an increase in performance and effectiveness which will ultimately impact and improve business results.

Objectives

By the completion of this course, you will be able to:

- Identify some common challenges and frustrations associated with the virtual teaming and virtual leadership processes.
- Accurately define a virtual team as well as effectively differentiate between virtual and conventional teams, and between work teams and work groups.
- Assess your current capabilities as an effective virtual leader by completing a virtual leadership readiness self-assessment.
- List and describe the four fundamental categories of challenge most commonly related to virtual leadership.
- Implement a number of appropriate tools and techniques that will increase effectiveness as a virtual leader and aid in your ability to increase the performance of your virtual teams.

Virtual Team Assessment

What does virtual mean?

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

What constitutes a team?

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

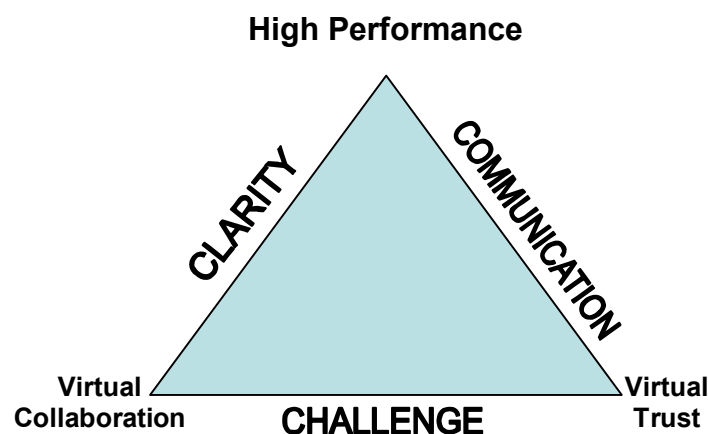
A Working Definition

A virtual team is a group of people who are geographically, culturally, and/or functionally diverse, who rely primarily or exclusively on electronic forms of communication in order to work interdependently and collaboratively in an effort to reach a common set of goals.

Team Assessment

As a first step toward leading your team to high performance in a virtual environment, it is important to assess the current state of the group. In order to focus your evaluation, ask yourself the following questions:

- What are the strengths and weaknesses of your team?
- How virtual is your team?
- How close are you to a high performing team?



To get a sense of your team's strengths and weaknesses, complete the assessments on the following pages, using the table below for your ratings:

Score	Strength	Importance to the business	Direction
5	Strongly agree	Critical	Getting much better
4	Agree	Very important	Getting better
3	Somewhat agree	Important	About the same
2	Disagree	Somewhat important	Getting worse
1	Strongly disagree	Not important	Getting much worse

Team Effectiveness Profile ¹

You will know your work group has evolved into a high performing team when there is uniformly high commitment, there is adequate capacity to do the job, and there is a team culture in which accountability, personal development and success are highly valued.

The Team Effectiveness Profile summarizes specific norms from the literature on team development into three categories: commitment, capacity, and culture. Using the table on the previous page, write down the numeric score that best matches what is true for you for each of the three columns on each question.

	Strength	Importance	Direction
Commitment			
We have a shared vision of what is possible for our team.			
We have a common purpose.			
We have challenging performance goals.			
We have opportunities for personal development.			
We receive constructive feedback.			
We are rewarded fairly for our contributions.			
We are rewarded as a team.			
Roles and responsibilities are clear.			
The organization is concerned about our well being.			
Capacity			
We have the skills we need to meet our requirements.			
We have complementary skills.			
We have complementary styles.			
We have the resources and tools we need to meet our requirements.			

¹ Bellingham, R., *Virtual Teams*

Team members demonstrate excellence in their work habits.			
Culture			
We are accountable for our performance.			
There is a high level of trust in our team.			
We have open, honest, direct communication.			
People think interdependently on the team.			
We seek ways to support each other.			
We are involved in decisions that affect us.			
We strive to perform at the highest possible quality.			
We are innovative.			
We have fun.			
We are empowered to do our jobs.			
We encourage multiple perspectives when accomplishing tasks.			
Successes and failures are shared collectively.			
We respect each other.			

Virtuality Assessment ²

For each of the statements below, circle one number on the continuum scale that best represents your team's characteristics. The 1 represents the statement on the left and 5 represents the statement on the right.

My team has the following characteristics:

We're in the same physical work space.	1	2	3	4	5	We're in many workplace locations.
We're in the same time zone with the same work hours.	1	2	3	4	5	We're in many time zones with flexible work hours.
We're at the same level within the organization.	1	2	3	4	5	We're from many levels within the organization.
We're in the same department.	1	2	3	4	5	We're from many departments.
We're in the same organization.	1	2	3	4	5	We're from many organizations.
We live and work in the same culture.	1	2	3	4	5	We're from many diverse cultures.

² Bellingham, R., *Virtual Teams*

Development Assessment ³

Answer the following questions to get a snapshot assessment of the way in which your team is functioning right now. For each of the questions below, circle the number on the scale that best represents your team's characteristics.

Orientation

We are unsure of why we are part of the group.

1	2	3	4	5
---	---	---	---	---

We feel a sense of belonging to the group.

Trust Building

We do not feel comfortable expressing our opinions.

1	2	3	4	5
---	---	---	---	---

We have revealed our true agenda for being part of the group.

Goal Clarification

We are struggling over conflicting objectives.

1	2	3	4	5
---	---	---	---	---

We understand what we're trying to accomplish.

Decision Making

Our roles conflict and overlap with one another.

1	2	3	4	5
---	---	---	---	---

We are clear about roles and tasks. We are now ready to focus on getting to work.

Implementation

We do not know the specific work that needs to be done.

1	2	3	4	5
---	---	---	---	---

It is clear who does what, when, and where, and we are productive.

High Performance

We are overwhelmed by the amount of work that needs to be done.

1	2	3	4	5
---	---	---	---	---

There is true synergy in the group. The group together is greater than the sum total of the individuals.

Renewal

We feel burned out, defeated and irritable. We are not interested in continuing.

1	2	3	4	5
---	---	---	---	---

We re-evaluate our vision and goals at the end of each major task. We build back lessons learned into how we do our work.

³ Bellingham, R., *Virtual Teams*

Virtual Leadership Self-Assessment ⁴

The following assessment will help define your current level of readiness to operate as a virtual leader and identify areas of focus for your action plan.

	Disagree	Agree	Strongly Agree
I am able to schedule and utilize my resources (people, equipment, etc.) effectively to create a product/service without having to oversee the project at all times.			
I am familiar with my team members' performance and trust them to do the job.			
My team supports virtual work.			
I support virtual work.			
I have the skills needed to manage my team's performance from a distance and for results.			
Each virtual employee and I know how to organize his/her work effectively in order to meet performance expectations, including organizing between virtual and on-site workstations.			
Systems are in place about how and when virtual workers need to inform those they work with and for.			
The job descriptions I manage are partially or fully "virtually workable."			
I manage my in-house team well, but would like assistance in developing my distance management skills.			
I have clear communication systems and feedback mechanisms in place.			
I am familiar with each of my team members' performance.			
I trust my team members.			
I coach my team members to develop to their fullest potential.			
I have contingency plans for delays and other project interruptions or changes.			
I delegate responsibility and authority effectively.			
I provide clear direction to my team, enabling them to work without constant supervision.			
I manage for results, and can clearly communicate my performance expectations.			
I can scout for career opportunities for my remote team members and provide virtual access to those opportunities.			

⁴ Hoefling, T., *Working Virtually*

Team Areas of Strength

- _____
- _____
- _____
- _____
- _____
- _____

Team Areas of Opportunity

- _____
- _____
- _____
- _____
- _____
- _____

Possible Action Items

- _____
- _____
- _____
- _____
- _____
- _____

The Four Stages of Team Development ⁵

In 1965, Bruce Tuckman introduced a model for group development that holds true for both conventional, co-located teams as well as those that are virtual in nature. The model describes four stages or progressions that a group must go through in order to develop and mature into a productive, high-performing team and maintains that if a group is not successful during one stage, it will not be capable of progressing to the next.

The four stages of team development are:

Forming

Storming

Norming

Performing



⁵ Tuckman, B. W., *Developmental Sequence in Small Groups*

The Leader's Role

Forming

Leader's Role: _____

Questions for the team to answer:

- _____
- _____
- _____
- _____

Storming

Leader's Role: _____

Questions for the team to answer:

- _____
- _____
- _____
- _____

Norming

Leader's Role: _____

Questions for the team to answer:

- _____
- _____
- _____
- _____

Performing

Leader's Role: _____

Questions for the team to answer:

- _____
- _____
- _____
- _____

Fundamental Organizational Dynamics for Effective Virtual Teams

Research done on virtual teaming has resulted in the identification of four fundamental categories of leadership performance that, when implemented, create an environment for high levels of employee satisfaction, performance, and productivity.

These organizational dynamics include: establishing trust among team members, incorporating effective communication methods, implementing strategies to navigate cultural diversity, and effectively managing collective and individual performance and accountability.



While these concepts are indisputably valuable in all team environments, they are critical in a virtual environment due to the lack of face-to-face interaction that helps to facilitate these dynamics.

Building Trust

There are two levels of trust that can exist among team members: **task-based** trust and **interpersonal** trust. Task-based trust is a team member's ability to predict a peers' behavior based on past experience. Interpersonal trust refers to the confidence among team members that their peers' intentions are good, and that there is no reason to be protective or careful around the group.

Openness, acceptance and security create trust. Each member of a team has the ability to enhance or create barriers to trust within the group. In order to establish high levels of trust in a *virtual* environment, the group should take great care to foster the characteristics represented in the acronym TRUST⁶ in themselves and others:

- T** **Tolerance** – Accept the ideas of others with minimal criticism. If you disagree, keep your critique focused on the idea, not the person.
- R** **Responsibility** – Keep commitments and don't make promises you can't keep.
- U** **Understanding** – Allow for differences in others. Communicate clearly to ensure that others can understand your ideas. Be open to feedback and give support when needed.
- S** **Sharing of ideas** – Be honest in your communication and include others.
- T** **Togetherness** – Don't create hidden agendas or cliques within the group. Spend time with other team members whenever possible.

These characteristics are most likely to develop when the following conditions exist on the team:

- Communication is truly open
- Teams meet face-to-face at least once
- Members feel empowered to make and act on decisions
- Conflicts are managed and not avoided
- The team leader models and reinforces these positive behaviors

⁶ Bellingham, R., *Virtual Teams*

The Challenge

What happens when trust is not present in a relationship?

What are the challenges of establishing high levels of trust among team members?

What are the barriers to establishing high levels of trust among team members?

Incorporating Effective Communication

Effective communication is a combination of attitudes, behaviors and skills. When a group practices effective, open communication, trust levels go up and as a result, people begin to think interdependently, involve others in decision making, look for ways to support one another, seek out multiple perspectives and give constructive feedback.

When asked about communication in a virtual environment, people often focus on the technological means to communication and neglect the essence of the process.

The Communication Links⁷ model provides a more holistic view:

Media	Interactions	Relationships
Technology		People
Medium	Process	Patterns
Physical	Observable	Experience
Data	Behavior	Learning
Nervous System	Thinking	Knowledge

Media such as e-mail, telephones, Web sites, etc., provide the channel, or means, for communication but are independent from the people or what they want to communicate.

Interactions are the processes that ensue between individuals. They are the behaviors that generate the dynamics of a group.

Relationships are the cumulative effects of interactions. They are the patterns that simplify the complexity of interactions along with the learning and emotions that result from the experience.

Relationships develop among people in a group over time and as a result of their interactions. If they are positive and productive, the group becomes capable of developing into a team.

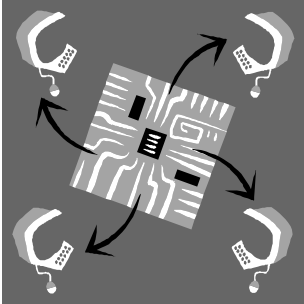
⁷ Lipnack, J & Stamps, J., *Virtual Teams: Reaching Across Space, Time, and Organizations with Technology*

The Challenge

Communicating in a virtual environment greatly diminishes the rich subtext of information we receive from body language and verbal cues. Participating in online meetings requires more risk-taking and more thoughtful presentation of ideas in order to be effective. Managing multiple sources of information (team Web sites, Communities of Practice, Intranet sites, e-mail, etc.) can be intimidating and difficult to stay on top of.

As a result, it is important for team leaders to monitor individual participation and help team members overcome any challenge and/or resistance they might have toward effective team communication.

Tips for Effective Communication in a Virtual Environment:



What Can I Do?

A virtual team should engage in the creation of an agreed upon communication infrastructure, which addresses issues related to how updates will be done, what information should be passed on, and what decisions should involve everyone.

Although each team should use the format that works best for their needs, all communication infrastructures should be:

- Standardized
- Organized
- Timely
- Easy

If established early and adhered to, this tool will aid in maintaining rapport and prevent trust from breaking down due to unintentional misunderstandings. The example below outlines the recommended criteria of an effective plan.

Who	Needs to Talk to/ Respond to Whom	About What	For What Purpose	Through What Medium / Forum	In What Time Frame	How Often	Who Else Needs to Be Informed
	Manager						
	Team						
	Individual Team Members						
	Strategic Partners						
	Customers						
	Support Function						
	Other Teams						
	Other Stakeholder						

8

⁸ Hoefling, T., *Working Virtually*

Navigating Cultural Diversity

A diverse employee body is valuable for many reasons. It reflects the population, in which the company operates, provides better sensitivity to customers and suppliers, helps generate a variety of ideas and perspectives, and aids in keeping the organization fresh and responsive.

Lack of intercultural sensitivity, therefore, can be a significant barrier to taking advantage of the opportunities diversity presents, and can contribute to the inability of a team to achieve productivity and effectiveness.

Diversity among virtual teams might include:

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

The Challenge

It is important in diverse environments for individuals to attempt to remain objective regarding the observable differences of team members. All too often, people focus on difficult intercultural interactions because they appear to be the “problem” when the “problem” is more frequently related to the attitude of the observer, not the action of the other team member.

Teams work best when they have a broad variety of styles and can build on those differences in a positive way. Because conflicting styles are likely to exist in a team setting, it is important to understand how each team member’s style preferences can contribute to team effectiveness.

What happens when teams are not sensitive to the cultural diversity among team members?

What are the benefits of having diverse perspectives on a team?

What Can I Do?

Use the following five techniques to effectively respect and encourage diverse characteristics and behaviors among virtual team members:

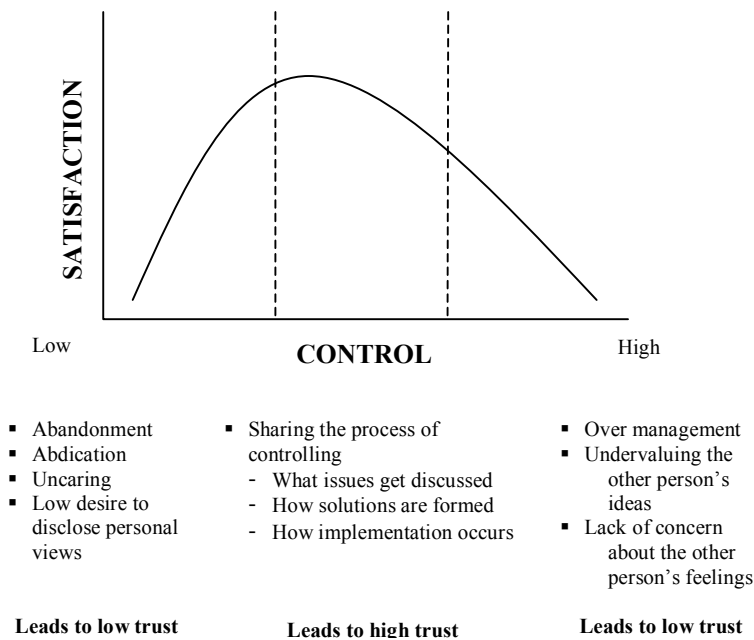
- Listen – hear and interpret verbal cues
 - ◆ Resist distractions
 - ◆ Suspend judgment
 - ◆ Recall the content
 - ◆ Reflect upon meaning
 - ◆ Reflect upon the volume, tone, pace, or writing style
 - ◆ Paraphrase the content
- Question – use thoughtful inquiry to obtain a clear understanding
 - ◆ Ask direct questions if you want short answers
 - ◆ Ask open-ended questions if you want to encourage others to respond
 - ◆ Don't ask leading questions
- Demonstrate understanding – express your comprehension of the other person's point of view
 - ◆ Think it out first
 - ◆ Paraphrase, don't repeat
 - ◆ Keep it short
 - ◆ Use words the other person will understand
- Give your perspective and disclose who you are - present your view in an honest, straightforward and clear manner
 - ◆ Organize your viewpoint
 - ◆ Present your viewpoint
 - ◆ Demonstrate understanding of the reaction to your viewpoint
- Manage conflict – resolve differences in a way that results in a win-win outcome
 - ◆ Identify values
 - ◆ Expand alternatives
 - ◆ Select the best alternative



Managing Performance and Accountability

In a conventional, co-located team environment, supervising and monitoring performance is often accomplished by walking around and personally checking on the activities of each team member. Because virtual teams are distributed across multiple locations, however, old paradigms of control and organizational structure must be relinquished. Successful virtual teams rely on employee empowerment rather than management control and direction.

Control and Relationship Satisfaction⁹



Virtual team members must have much more independence and decision-making capability than people typically do in bureaucracies and to a large extent, must learn to self-manage. If an environment of trust and open communication has been established, the most effective and efficient means of maintaining high standards of performance on a team is peer pressure.

⁹ LaFasto, F. & Larson, C., *When Teams Work Best*

The Challenge

Accountability is the willingness of team members to call their peers on performance or behaviors that might hurt the team. If high levels of trust are not established among the group, this process will not occur due to people's general tendency to avoid interpersonal discomfort and difficult conversations.

Why do team members avoid interpersonal discomfort and difficult conversations?

What are some strategies for overcoming these issues?

What Can I Do?

The implementation of the following techniques will launch an environment of high performance and accountability among virtual team members:

- Publicly post team goals and standards
- Clarify team roles and responsibilities
- Engage in rotated, shared, or distributed leadership responsibilities
- Facilitate simple and regular process reviews
- Align behaviors with rewards and recognitions
- Encourage and allow the team to serve as the first and primary accountability mechanism
- _____
- _____
- _____
- _____
- _____

Network of Support

Name	Position/Department	Phone Number

Action Plan

Action	Resources Needed	People Involved	Timeframe

Best Practices Page

As you hear, do, or think about something that will help you back on the job, capture it here for quick reference.

Resources




- Bellingham, R. Ed.D (2001). *The manager's pocket guide to virtual teams*. Amherst, MA: HRD Press, Inc.
- Hoefling, T. (2001). *Working virtually: Managing people for successful virtual teams and organizations*. Sterling, VA: Stylus Publishing, LLC.
- LaFasto, F. & Larson, C. (2001). *When teams work best: 6000 team members and leaders tell what it takes to succeed*. Thousand Oaks, CA: Sage Publications, Inc.
- Lipnack, J. & Stamps, J. (1997). *Virtual teams: Reaching across space, time and organizations with technology*. New York, NY: John Wiley and Sons, Inc.







Facilitator Guide

The facilitator guide was developed in a manner that allows for facilitators of all skill and experience levels to be successful in delivering the instructional design. The level of detail provided allows for new, or less experienced facilitators to read from the lecturettes, debrief questions, activity set-up instructions, etc. in order to be sure he or she is succinct in his or her delivery and, therefore, guiding the learners toward the intended learning objectives and course outcomes.

For more experienced facilitators, the icons located in the left hand column of the guide, provides him or her to glance down at the page and quickly identify the element of the course that is to happen next. Additionally, the use of consistent, bolded, action words provides a quick reference cue to the type of activity occurring next in the sequence of the course. By utilizing this format, a facilitator can customize the guide to fit his or her needs, accommodating all levels of facilitator competencies.

The following is an explanation of the icons and action words used in the facilitator guide. The left column displays icons that indicate workbook pages, references to pre-fabricated, facilitator-prepared charts, etc. The icons used in this guide include:

	<p><i>Indicates the use of an icebreaker</i></p>
	<p><i>Refers to the Participant Training Workbook and provides the page number beneath the icon</i></p>
	<p><i>Indicates the use of a slide in a PowerPoint presentation</i></p>

	<p><i>Marks a point at which the facilitator distribute materials to participants</i></p>
	<p><i>Indicates that the facilitator should divide participants into smaller groups for an activity</i></p>
	<p><i>Indicates the use of a chart that should be posted for future reference during the session or that has already been posted</i></p>
	<p><i>Indicates a point in which the participant reads and highlights information in his/her participant guide</i></p>
	<p><i>Indicates a point in which the participant should engage in individual work, generally within the participant guide</i></p>
	<p><i>Indicates the use of an easel chart</i></p>

The action words that appear throughout the facilitator guide direct him or her to the action occurring next, in the sequence of course events. They are bolded and typed in all capitals so that they stand out on the page, and break up the text into manageable sections. The action words used in this guide include:

ALLOW

Provide a specified amount of time for an activity.

ADVANCE

Advance the PowerPoint presentation.

ASSIGN

Assign a particular task to an individual or a group.

ASK

Ask the question(s) provided below.

CHART

Write participant responses on an easel chart, or chart paper.

CIRCULATE

Walk among participants to answer questions or observe activities.

DISTRIBUTE

Hand indicated materials (e.g., handouts, chart paper, and pens) to participants.

DIVIDE

Break participants into work groups of 2 or more.

HAVE

Give instructions or directions to participants.

INVITE

Encourage participants to join in.

RECONVENE

Bring together the entire group after small-group activities.

REFER TO

Refer to the participant guide or chart while facilitating a learning activity that relates to it. A sample of the chart is provided in the left-hand column.

SAY

Make an introductory or content-related statement. These statements are scripted. However, you may adapt them to your own style or situation.

TRANSITION

Make a transition statement. These statements are scripted. However, you may adapt them to your own style or situation.

WALK THROUGH

Point out specific pages and/or items as you give directions or demonstrate an activity.

After some ASK elements, sample participant responses are included that can help guide the facilitator's questioning. Specific notes or cautions for the facilitator may appear as well. The Classroom Setup portion of the guide provides the facilitator with a recommended room configuration for creating an effective learning environment for the

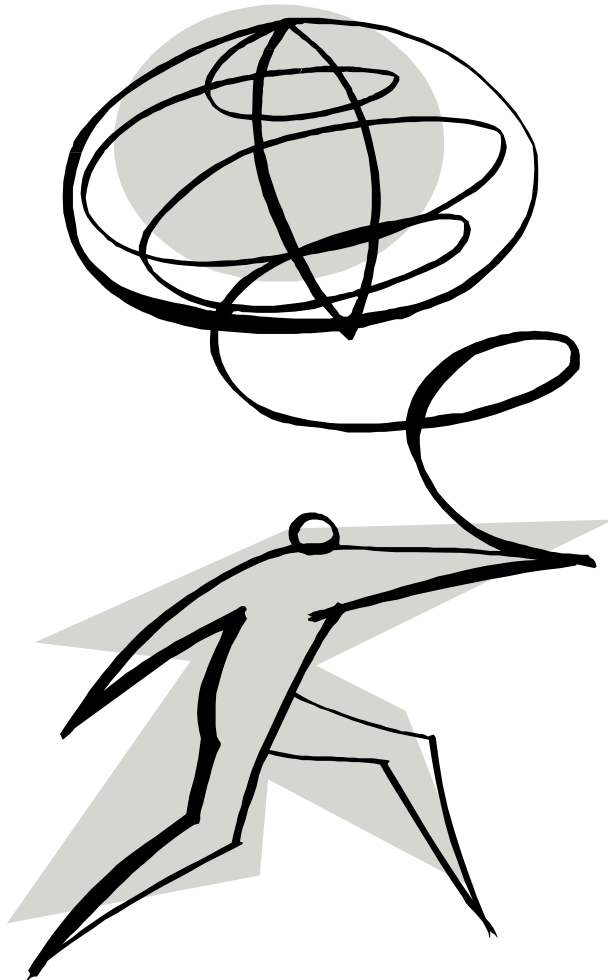
course. Additionally, a list of required materials and supplies needed to facilitate the learning activities is provided along with a reference to the appropriate Appendix from which the materials can be retrieved.

The Pre-fabricated, and Handwritten/Disposable Charts portion of the guide is intended to assist the facilitator in preparing his or classroom. The pre-fabricated charts should be printed on a plotter printer at poster size and posted at appropriate locations throughout the room. The handwritten/disposable charts are intended to be used and written on during the course either by the facilitator or by the participants as they work in small groups. It is recommended that the facilitator have the charts pre-written on chart paper and stored in an easily accessible place, such as on an easel chart, so that they can be quickly accessed and used during the course of the appropriate activity.

The remaining portions of the guide outline exactly what the facilitator should do, say, ask, etc. for every step of the course. This format provides a template for effective, consistent delivery of the instructional objectives and outcomes. If followed, the guide should take the guess work out of facilitating this course and provide the participants with a set of tools and techniques that will enhance their virtual leadership skills, and therefore, increase team performance.

Effectively Managing a Virtual Workforce

Facilitator Guide



Classroom Setup



Classroom Setup

Participant tables:

- ✓ For a class of 20 people – 3 table pods of 7 chairs each
- ✓ One participant guide at each seat
- ✓ One name tent at each seat
- ✓ One basket of markers for each table pod

Instructor materials:

- ✓ **Magic Bag Activity**
 - Magic bag
 - Quarter
 - Dollar bill
- ✓ **ABC Aerospace Activity – See Appendix D**

There should be 5 envelopes per group: Manager, Employee A, Employee B, Employee C, and Employee D. Each envelope is labeled on the outside with the appropriate city (or location) of that employee's home office.

Templates for all of the materials can be found in Appendix C.

The Manager envelope includes:

- Participant contact list (including name and cell phone numbers)
- Copy of the Airplane manager doc

Employee A envelope includes:

- Participant contact list (including name and cell phone numbers)
- One sheet of yellow 8 1/2x11 paper

Employee B envelope includes:

- Participant contact list (including name and cell phone numbers)
- Page one of the Airplane Model Instructions doc

Employee C envelope includes:

- Participant contact list (including name and cell phone numbers)
- Page two of the Airplane Model Instructions doc

Employee D envelope includes:

- Participant contact list (including name and cell phone numbers)
- Page three of the Airplane Model Instructions doc

✓ **Stages of Team Development Activity – See Appendix E**

There should be one envelope for each group. Each envelope contains:

- One set of laminated Four Stages of Team Development headings
- One set of laminated “Questions to ask during each Stage of Team Development” questions, cut into individual question strips.

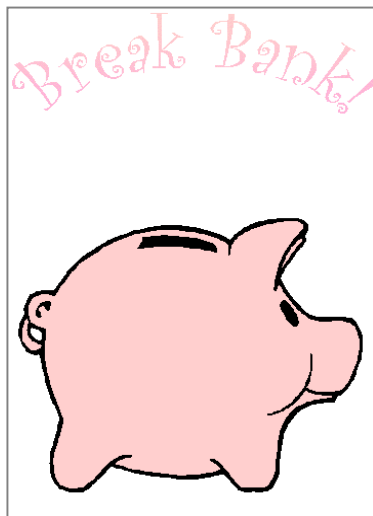
✓ **Building Trust Activity – See Appendix F**

There should be one envelope for each group. Each envelope contains:

- Several laminated copies of instructions for Trust activities.
- One packet of all of the Trust activities for each participant.

✓ **Communication Puzzle Activity – See Appendix G**

- One puzzle for each table group with several of the puzzle pieces misplaced in the other team’s envelopes.

PRE-FABRICATED CHARTS:*Agenda*

- ✓ ABC Aerospace
- ✓ Outcomes/Objectives
- ✓ Team Assessments
- ✓ Four Stages of Team Development
- ✓ Fundamental Organizational Dynamics
- ✓ Action Planning

HANDWRITTEN/DISPOSABLE CHARTS:

Things that Worked Well

Things That Could Have
Been Improved

What are the benefits of having diverse perspectives on a team?

What happens when teams are not sensitive to the cultural diversity among team members?

Communication

Body Language _____%

Voice Tone _____%

Words _____%

ABC Aerospace Corp

Welcome/Introduction

SAY:

Good morning! Welcome to *Effectively Managing a Remote Workforce*.

This class is going to provide you with some tools and techniques to help you lead your virtual teams to high performance and productivity.

We'll be doing a lot of group work and activities as we go through the material, so don't get too comfortable where you are! You will be up and moving around throughout the class and I'm going to ask that you really allow yourself to open up and participate to the fullest extent of your ability.

In fact, just to get us started, I need a volunteer!

ALLOW a participant to step to the front of the class.



SHOW the magic bag to the class and turn it upside down to illustrate that there is nothing in the bag and then hand a quarter to the participant.

INVITE him or her to place the quarter in the bag.

SAY:

Throughout the day, I'll be asking you to step out of your comfort zone and try new things.

AS YOU ARE TALKING, MOVE YOUR HAND OVER THE BAG AS IF YOU ARE PERFORMING MAGIC AND INCONSPICUOUSLY TWIST THE HANDLE TO SWITCH THE INSIDE COMPARTMENT OF THE BAG.

INVITE the participant to reach into the bag again and remove the contents.

THE BAG NOW CONTAINS A DOLLAR BILL.

ENCOURAGE the participants to clap and congratulate the participant.

SAY:

So, what I'm saying is that the more you put into this class the more you will take out of it.

ASK:

- Make sense?

- Do we have a deal?

SAY:

Now, who has a twenty for the bag? 😊

ASK:

- Are you ready to get started?

SAY:

OK, good, let's get up and move around for a bit.

SAY:

You are all members of intact work teams that are employed by ABC Aerospace Corp. The company, as you know, has been working very hard on several new airplanes for one of our largest corporate clients, Acme Express Inc.

One of the client's top executives is here at Corporate Headquarters today to attend to some other business. In order to make the most of her time, she has made a last minute request to see some prototypes of our newest planes in order to finalize her upcoming purchasing decision.

Let me introduce you to the Senior Vice President in charge of Aviation for Acme Express Inc!

INTRODUCE YOURSELF AS THE SENIOR VP BY SAYING "HI, I'M (FACILITATOR NAME) AND I'M THE SENIOR VP OF ACME EXPRESS, INC. OR, ARRANGE IN ADVANCE, TO HAVE ANOTHER PERSON VISIT THE CLASS TO SERVE AS THE SENIOR VP FOR THE DURATION OF THE ACTIVITY.

INVITE the participants to applaud and cheer for the SVP.

SAY:

Unfortunately, we've all been messing around at this All Hands On Deck meeting this week and, as a result, we don't have any prototypes ready for the SVP to review. Therefore, it is imperative that we all get back to our offices immediately in order to begin production.

I will give you what you will need in order to complete the task; but first, in just a moment we'll divide into groups and each group will need to identify a manager for their team.

DIVIDE the class into four groups of five people each (based on a 20 person class) and have them stand together as a group in the classroom.

ALLOW a couple of moments for the groups to select a manager.

SAY:

OK, in just a moment I'm going to distribute a packet of information to each manager.

In these packets you have all of the information and resources you need to produce the prototype the client has asked for.

Each team will assemble their own prototype so that at the end of the activity, we will have 4 prototypes for the client to review.

Each member of your team has critical information. No one member has enough information to complete the task. You will need to work together in order to be successful.

Unfortunately, the information you need is back at your office. In just a moment, your manager will give you an envelope of information but you cannot open it until you are back at your office.



DISTRIBUTE a packet to each Team Manager.

HAVE the managers open their packets and distribute an envelope to each member of his or her team, keeping the Manager envelope for him or herself.

SAY:

You may have noticed from your envelopes that your team members are dispersed over several different cities! That means that once you get back to your offices, your only means of communication will be over the phone or via e-mail.

Luckily, we are all at this All Hands Meeting today, so, you have a rare opportunity to consult with your team face to face in order to come up with a strategy on how you plan to work together.

You cannot open your envelopes until you are back at your offices, however.

Before you begin discussion, let me tell you exactly how this will work. When I say "go", you will have 2 minutes to strategize with your team. When the whistle blows, you must all immediately go to your offices. Once at your office, you can open your envelope, view the information and/or resources you have and then work with your team (however you agreed to do so) in order to complete the prototype.

Year-end budget restrictions and time restraints **will not** allow for you to come together as a group to complete this task. You must work from your home base. If you have multiple team members in the same home based city, they may work together face to face, otherwise, you can rely on phone, e-mail, etc. for communication.

Additionally, all of the information and resources you have are in these envelopes. That means that you cannot go to any other sources for information and/or resources. You must work only with what your team possesses.

You will have 30 minutes from the time the whistle blows to complete the activity.

ASK:

- What questions do you have?

FACILITATOR NOTE:

DO NOT PROVIDE THE PARTICIPANTS WITH ANY ADDITIONAL INSTRUCTIONS, SOME OF THE QUESTIONS THEY HAVE WILL BE ANSWERED IN THEIR MATERIALS. THE REST, THEY WILL HAVE TO FIGURE OUT ON THEIR OWN.

REFER TO the *Office Location* chart paper and say:

- If you are based in San Diego, your office is here in this room.

- If you are based in Dallas, your office is _____.
- If you are based in Boston, your office is _____.
- If you are based in Denver, your office is _____.

ASK:

- Are you ready?

SAY:

OK, you have two minutes to strategize beginning now. DO NOT open your envelopes.



ALLOW 2 minutes for group work.

SOUND the whistle at the end of two minutes.

SAY:

OK, your planes are leaving!!! Go to your "offices" and begin work. The SVP will be here in **30 minutes!!!**



ALLOW 30 minutes for group work.

CIRCULATE during the activity to ensure the teams are on track and to ensure they are not sharing resources or "cheating".

RECONVENE the class when the 30 minutes is up.

HAVE one member of each team quickly present his or her plane for the client and demonstrate its flight ability.

ALLOW the SVP to announce a winner.

DISTRIBUTE small prizes to each of the group members.

INVITE the participants to give themselves a round of applause for a job well done.

ASK:

THE FOLLOWING QUESTIONS ARE TO BE USED AS A GUIDE FOR LEADING THE DEBRIEF. BASED ON THE GROUP'S EXPERIENCE, ASK THE QUESTIONS THAT ARE MOST APPROPRIATE. TRY TO GUIDE THE QUESTIONS TOWARD UNCOVERING FEELINGS ABOUT THE 4 ORGANIZATIONAL DYNAMICS THAT WILL BE DISCUSSED LATER IN THE CLASS.

- What did you think about this activity?
- What was challenging about it?
- What did you have to do in order to be successful?
- What was the manager's role?

- Would your experience have been different if you were all in the same room?

- What did you have to do differently as a result of your different locations?
- Did you trust that your other team members were doing the right thing?
- Did any members seem to not participate, or contribute?
- How were interpersonal issues handled?
- Did anyone feel as though they were not really included in the team or have difficulty working with the other members?
- Does this ever happen in the real world?

SAY:

We're going to talk more about this and some other challenges that we all face later this afternoon. In order to capture some of the issues that we've uncovered through this activity while they are still fresh in your head, however, let's spend a few minutes discussing what worked well, and what could have been done differently in order to have improved this process.



DIVIDE the class into two groups and have each group stand next to an easel chart on opposite sides of the room.

**SAY:**

Spend the next few minutes with your group brainstorming the things that worked well or things that could have been improved, depending on which chart is in front of you.

Once you have captured all of your ideas, go ahead and go back to your seats.

ASK:

- What questions do you have?

SAY:

OK, you may begin.



ALLOW approximately 5 minutes for group brainstorming.

RECONVENE the group when the brainstorming is complete.

INVITE the participants to return to their seats if they have not already done so.



Page 3

HAVE the participants turn to page 3 of their participant guides.

SAY:

In just a moment, we're going to hear from each group. As you are listening, jot down some of the thoughts from each chart on page 3 of your participant guides.

INVITE one member of each group to present their group's brainstorming list to the class.

SAY:

Wow! There are definitely some areas of opportunity with this kind of process!

This class is going to address many of the issues you have raised here. We will revisit this list at the end of the class to see if there are some things you can apply the next time you are in this kind of situation.

TRANSITION:

Before we get too far into things, however, let's take a moment to go over exactly what we will be covering today.

Course Introduction



Page 4

Course Outcome/Objectives

HAVE the participants turn to page 4 of their participant guides.



Slide 2

ADVANCE to slide 2 of the PowerPoint presentation.

SAY:

The outcome of this course is to address some of the most common challenges you will face as the leader of a virtual team and provide some proven tools and techniques to help you lead those teams to an increase in performance and effectiveness which will ultimately impact and improve business results.



Slide 3

ADVANCE to slide 3 of the PowerPoint presentation.

READ ALOUD:

By the completion of this course, you will be able to:

- Identify some common challenges and frustrations associated with the virtual teaming and virtual leadership processes.
- Accurately define a virtual team as well as effectively differentiate between virtual and conventional teams, and between work teams and work groups.
- Assess your current capabilities as an effective virtual leader by completing a virtual leadership readiness self-assessment.
- List and describe the four fundamental categories of challenge most commonly related to virtual leadership.

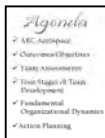
- Implement a number of appropriate tools and techniques that will increase effectiveness as a virtual leader and aid

ASK:

- What questions do you have about what we'll be covering?

SAY:

OK, well, now that we know where we're going, let's take a quick look at how we'll get there.



REFER TO the *Agenda* chart and read aloud:

- *First, we experienced an activity called ABC Aerospace Corp. We'll continue to discuss that experience throughout the class.*
- *Just a moment ago, we discussed the course outcome and objectives.*
- *Next, we're going to conduct a virtual team overview.*
- *I'll then give you an opportunity to assess your own teams and your role in them.*
- *We're going to take a quick look at the Four Stages of Team Development*
- *And, finally, we'll introduce and discuss the Four Organizational Dynamics of effective virtual teams.*

ASK:

- Does this sound good?

SAY:

Let's review a couple of housekeeping items before we get started.

REFER TO the *Parking Lot* chart and say:

If you have a question on a topic that we will be covering later, please put it on a Post It note and attach it to the Parking Lot. We'll come back to it at the appropriate time.

**REFER TO** the "Break Bank" chart and say:

We will take breaks, as needed, throughout the day. Instead of me telling you when you need a break, however, I would like for you to be in charge of that process.

**ASSIGN** the break bell to a participant in the class.**SAY:**

When you feel as if the group needs a break, ring the bell and then ask another member of the group to come up to the "Break Bank" chart and select an amount of time from the ones posted here.

It will be that person's responsibility to make sure that everyone is back from break on time. Once you have used an allotment of time from the break bank, it cannot be used again. So, make sure that you are using your time wisely!

ASK:

- What questions do you have?
- Are you ready to begin?

TRANSITION

OK, so that we are all on the same page, let's spend a couple of moments to clarify the topic of this course.

Team Assessments



Virtual Team Defined

HAVE the participants turn to page 5 of their participant guides.

ASK:

- How many of you are clear on exactly what I mean when I say *virtual team*?

SAY:

We hear these words all the time in a corporate culture, but, not everyone means the same thing when they say they are on a virtual team.

Take a few moments with the other members of your table group to discuss what it means to be *virtual* and what exactly constitutes a *team*.

Record your thoughts in the space on page 5.

When everyone has finished, I'll ask you to share your thoughts with the rest of the class.

ALLOW a few minutes for group work.

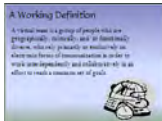
RECONVENE the class when the brainstorming is complete.

HAVE one member of each table group present their table's work.

SAY:

OK, just as I suspected, each of you has a slightly different idea about what a virtual team is.

For the purposes of this class, it is very important that we all recognize a single definition so that there is no confusion about the context for the tools and techniques we will be covering.



Slide 4

ADVANCE to slide 4 of the PowerPoint presentation.

READ ALOUD:

A virtual team is a group of people who are geographically, culturally, and/or functionally diverse, who rely primarily or exclusively on electronic forms of communication in order to work interdependently and collaboratively in an effort to reach a common set of goals.

SAY:

So, in other words, people who make up a virtual team are not generally in the same location; might have different backgrounds and possibly be from different cultures and/or countries; and their work must be interdependent. They are not simply linked by an org chart. They must depend upon one another to accomplish the team goals.

ASK:

- Does this make sense?
- How many of you feel that your work groups meet this definition?
- Why or why not?
- What questions do you have so far?



Slide 5

SAY:

As a first step toward leading your team to high performance in a virtual environment, it is important to assess the current state of the group.

ADVANCE to slide 5 of the PowerPoint presentation.

SAY:

In order to focus your evaluation, ask yourself the following questions:

- What are the strengths and weaknesses of your team?
- How virtual is your team?
- How close are you to a high performing team?

ASK:

- Are there other questions you can think of that would be helpful to use as a guide?

SAY:

In just a moment, I'm going to give you the opportunity to complete several assessments regarding your work group.

The first is a Team Effectiveness Profile which summarizes specific norms from the literature on team development into three categories: commitment, capacity, and culture.

The second is a Virtuality Assessment in order to determine how virtual your work group actually is.

The third is a Development Assessment which will provide you with a snapshot of the way in which your team is functioning right now.

We're going to spend about 20 minutes of quiet time to complete the assessments. When you have finished the assessments, please wait quietly while the rest of the class completes the assignment.



Page 7-10

HAVE the participants turn to pages 7-10 of their participant guide.

WALK THROUGH the directions for the assessments.

SAY:

As with any assessment, try not to over think your answers. There is no right or wrong answer. The more honest you are, the more beneficial they will be to you.

ASK:

- What questions do you have?

SAY:

OK, you may begin.



ALLOW approximately 20 minutes for individual work.

CIRCULATE while the class is working.

RECONVENE the class when the assessments are complete.

WALK THROUGH the assessment results.

ASK:

- What did you think about these assessments?
- Were there any “a-has” that occurred?
- What surprised you?

SAY:

These assessments are not meant to tell you that you are doing anything right or wrong. They are simply meant to help make you aware of some of the things that are important to achieving high performance in a virtual environment.

If there were any areas in which you scored yourself particularly low, that might be something you want to revisit when you are creating your action plan.

We will be discussing several tools that can assist you with that as well.



Page 11

HAVE the participants turn to page 11 of their participant guides.

SAY:

Now that you have some information about the state of your teams, we need to define your current level of readiness to operate as a virtual leader and identify some areas of focus for development.

WALK THROUGH the directions for the assessments.

SAY:

As we did a few minutes ago, we will spend about 10 minutes of quiet time to complete the assessment. When you have finished, please wait quietly while the rest of the class completes the assignment.



ALLOW approximately 10 minutes for individual work.

CIRCULATE while the class is working.

RECONVENE the class when the assessments are complete.

WALK THROUGH the assessment results.

ASK:

- What did you think?
- Were there any "a-has" that occurred?
- What surprised you?



Page 12

HAVE the participants turn to page 12 of their participant guides.

SAY:

Go ahead and take a moment to jot down some of the areas of strengths and opportunities that you discovered as a result of the assessments. Then, think about some possible action items.



ALLOW approximately 5 minutes for individual work.

TRANSITION

Now that you have a better idea about your current state, we can shift our focus to the future state and the tools and techniques that will make sure that future is one of effective, high performance teams!

The Four Stages of Team Development



Page 13



Slide 6

Tuckman's Model

HAVE the participants turn to page 13 of their participant guides.

ADVANCE to slide 6 of the PowerPoint presentation.

SAY:

In 1965, Bruce Tuckman introduced a model for group development that holds true for both conventional, co-located teams as well as those that are virtual in nature.

ASK:

- Are any of you familiar with this model?
IF A MEMBER OF THE CLASS IS FAMILIAR WITH THE MODEL, ASK HIM/HER TO BRIEFLY EXPLAIN IT TO THE CLASS.

SAY:

The model describes four stages or progressions that a group must go through in order to develop and mature into a productive, high-performing team and maintains that if a group is not successful during one stage, it will not be capable of progressing to the next.



Slide 6

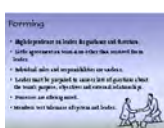
ADVANCE slide 6 of the PowerPoint presentation to reveal each stage of team development as you read aloud:

The four stages of team development are:

- Forming
- Storming
- Norming
- Performing

SAY:

Some of these probably already make sense, but let's take a closer look at each stage to get a better understanding of how the model works.



Slide 7

ADVANCE to slide 7 of the PowerPoint presentation.

INVITE the participants to take notes on page 13 of their participant guides as you explain the model.

SAY:

The first stage, forming, is where teams establish their purpose, goals and objectives. Members sort out their roles and responsibilities within the definition of their work mission and outputs. Research on high performing teams consistently concludes that when teams set goals and objectives and are clear on both what they are to do and how they will accomplish it, they reach higher performance levels in areas of customer satisfaction, production, and profitability.

ASK:

- Have you found this to be true in your experience?
- What questions do you have about forming?



Slide 8

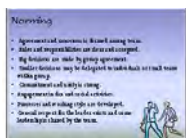
ADVANCE to slide 8 of the PowerPoint presentation.

SAY:

Stage two, storming, centers on conflict, power struggles, and lack of unity. For this reason, it is often a stage that teams try to avoid or retreat from. However, it is a natural and necessary stage for any team and, if they are to ultimately achieve at higher levels, they must anticipate the storming stage and plan ways to resolve the conflict.

ASK:

- How many of you have experienced storming on a team?
- What is it like?
- What happens if you are unable to deal with it effectively?
- What questions do you have about storming?



Slide 9

ADVANCE to slide 9 of the PowerPoint presentation.

SAY:

Stage three, norming, is the straightening out period for teams. The team has worked together for a while and members have emerged from the prior stages with earned trust, have agreed on priorities, and are finding a growing commitment to their work and each other.

ASK:

- Does this make sense?
- How long do you think it takes to reach this stage?
- Will all teams achieve this stage?
- What happens if they don't?

- What questions do you have about norming?



Slide 10

ADVANCE to slide 10 of the PowerPoint presentation.

SAY:

As teams achieve answers to the questions and challenges presented in stage three, their responses and insights lead to the fourth stage, performing. In this stage, the team knows and leverages its strengths and is able to manage its weaknesses. It is a cohesive, interdependent team that has learned to apply its insights in new situations. Team members know their roles and focus their energies on continually raising their performance levels.

ASK:

- Have you ever been on a team where everything just seems to work?
- What is it like to work in that kind of atmosphere?
- What happens to productivity?
- What about employee satisfaction?
- Can you achieve this level without going through the other stages first?
- What questions do you have about performing?

SAY:

So, obviously, the goal is to get all of our teams to the performing stage. It is our role, as leaders, to guide our teams through each stage successfully so that they can ultimately attain greater success.

ASK:

- Would you agree?

SAY:

OK, let's talk about the leader's role in each of these stages then.

DIVIDE the class into four groups.

SAY:

There are very specific roles a leader must play during each stage of team development in order for their team to be successful. Those roles can be defined, in many ways, by the goal or the outcome of the stage.

In other words, there are a handful of questions that a team must answer during each stage, and the leader's role will help the team to answer those questions.

ASK:

- Does that make sense?

SAY:

In just a moment, I'm going to give each group an envelope that contains some laminated pieces of paper with questions on them. Your task, as a group, is to figure out which stage of team development each question belongs in.

You can arrange them on your tables under the appropriate heading.

Once you have the questions arranged in the order you feel they belong, as a group, talk about the role the leader would play in order to help the team accomplish those tasks.

For example, I might say that the role is one of "Boss", or "Teacher", or "Friend", etc. Those are not the appropriate titles, I just want to give you an idea of the kind of "label" I am looking for.

ASK:

- Is everyone clear on what we are doing?
- What questions do you have?

SAY:

We'll take about 15 minutes to complete the activity. As soon as you get your envelope, you may begin.



DISTRIBUTE an envelope to each group.



ALLOW approximately 15 minutes for the group work.

CIRCULATE as the groups are working to answer questions and re-direct when necessary.

RECONVENE the groups when the activity is complete.



Page 14

SAY:

OK, let's see how close you got on the questions. Don't worry if you did not get them all exact. The point was for you to think about them and work through the process.

HAVE the participants turn to page 14 of their participant guides.

INVITE the participants to write down the correct questions in the space on page 14.

Forming • Why are we here? • Who are the members? • What do we contribute? • How can we begin to work together?	Storming • How will we resolve disagreements and conflicts? • Who is in charge here? • How will we uncover hidden agendas? • How do I fit into the group?
Norming • What's our goal? • How can we do better? • How can I help? • How can we help each other?	Performing • What does our best look like? • How do we do it best? • How can we help the best? • How can we influence others to do their best?

Slide 11

ADVANCE to slide 11 of the PowerPoint presentation.

READ ALOUD:

Questions for the team to answer during the forming stage of team development are:

- Why are we here?
- Who are the members?
- What do we contribute?
- How can we begin to work together?

ASK:

- How many did you get?
- Are you ready to move onto Storming?

Forming • Why are we here? • Who are the members? • What do we contribute? • How can we begin to work together?	Storming • How will we resolve disagreements and conflicts? • Who is in charge here? • How will we uncover hidden agendas? • How do I fit into the group?
Norming • What's our goal? • How can we do better? • How can I help? • How can we help each other?	Performing • What does our best look like? • How do we do it best? • How can we help the best? • How can we influence others to do their best?

Slide 11

ADVANCE slide 11 of the PowerPoint presentation to reveal the bullet points about Storming and read aloud:

- How will we resolve disagreements and conflicts?
- Who is in charge here?
- How will we uncover hidden agendas?
- How do I fit into the group?

ASK:

- How many did you get?
- Are you ready to move onto Norming?

Forming - Who are we here? - Why are we here? - What are our goals? - How can we begin to work together?	Storming - What will we struggle, disagreements and how to win? - How do we change team norms? - How can we overcome the initial conflict? - How do I influence the group?
Norming - What's working? - How can we do better? - How can I help? - Where else can we use our strengths?	Performing - What else can we do? - How do we constantly get better? - How can we raise the bar? - How can we celebrate what we have done?

Slide 11

ADVANCE slide 11 of the PowerPoint presentation to reveal the bullet points about Norming and read aloud:

- What's working?
- How can we do better?
- How can I help?
- Where else can we use our strengths?

ASK:

- How many did you get?
- Are you ready to move onto Performing?

Forming - Who are we here? - Why are we here? - What are our goals? - How can we begin to work together?	Storming - What will we struggle, disagreements and how to win? - How do we change team norms? - How can we overcome the initial conflict? - How do I influence the group?
Norming - What's working? - How can we do better? - How can I help? - Where else can we use our strengths?	Performing - What else can we do? - How do we constantly get better? - How can we raise the bar? - How can we celebrate what we have done?

Slide 11

ADVANCE slide 11 of the PowerPoint presentation to reveal the bullet points about Performing and read aloud:

- What else can we do?
- How do we constantly get better?
- How can we raise the bar?
- How can we celebrate what we have done?

ASK:

- How many did you get?
- So do these make sense?

SAY:

OK, so we know what questions the group is focused on during each stage; now let's talk about the role of the leader.

HAVE one member of each team come up to the easel chart and write down the "label" they came up with for each of the stages of team development.

ALLOW a few minutes for group work.

WALK THROUGH the responses on the chart paper and ask any necessary clarifying questions.

SAY:

These are all great ideas and I'm glad to see you have all put a lot of thought into this!

Let's take a look at the "official" labels that the model defines for each stage.



Slide 12

ADVANCE to slide 12 of the PowerPoint presentation.

SAY:

- The leader's role in the forming stage is: *Director*
- The leader's role in the storming stage is: *Coach*
- The leader's role in the norming stage is: *Facilitator*
- The leader's role in the performing stage is: *Delegator*

ASK:

- Do these make sense?
- Do you see the advantages to acting in these roles for each of the stages?
- What would happen if you used a role in the wrong stage, for example, if you acted as a *Delegator* in the forming stage?
- What about a Director in the *Performing* stage?
- What questions do you have about the Four Stages of Team Development?

TRANSITION:

OK, well, now that we have a fundamental understanding of teams, what makes them virtual, and what stages they will go through as they develop, let's talk about what you can do, as leaders, to ensure they are successful, productive, and performing at high levels.

Organizational Dynamics



Page 15

Introduction

HAVE the participants turn to page 15 of their participant guides.

SAY:

Take a couple of moments to read the text on page 15 and highlight anything that stands out to you. It could be something that you have a question about or something that you find interesting.



ALLOW a few moments for individual reading and highlighting.

ASK:

- What do you think about this?
- What did you highlight?
- Have you found this information to be true in your experience?



Slide 13

ADVANCE to slide 13 of the PowerPoint presentation.

SAY:

The organizational dynamics we will be discussing in this class include:

- Establishing trust among team members
- Incorporating effective communication methods
- Implementing strategies to navigate cultural diversity
- Effectively managing collective and individual performance and accountability

If you are able to create an environment in which these dynamics hold true, your team will be successful, high performers.

ASK:

- Does that sound good?
- Piece of cake, right?

SAY:

These are not difficult concepts. However, putting them into practice can sometimes be a little more difficult than it might sound.

TRANSITION:

We're going to spend some time on each of the four dynamics listed here in order to gain a better understanding of exactly what they mean, and, introduce some tools and techniques for each one that will help you create an environment for success!

Building Trust

Building Trust

ASK:

- What does it mean to trust someone?
- Is it easy to establish trust within a group?
- Why or why not?
- What conditions need to be present in order for trust to be possible?



Page 16

HAVE the participants turn to page 16 of their participant guides.

SAY:

Take just a moment to read the top of page 16 and highlight anything that stands out to you.



ALLOW a few moments for individual reading and highlighting.

ASK:

- So, what is task-based trust?
- What is interpersonal trust?
- Which ones do you need in a team environment?
CORRECT ANSWER: BOTH
- Which is easier to build?
CORRECT ANSWER: TASK-BASED

- If you **had** to pick one, which would you say is the most important?

CORRECT ANSWER: INTERPERSONAL

SAY:

Now, don't misunderstand, you want BOTH levels of trust among your team members. However, a team that trusts each other to get the job done but who never "let's their guard down" or who believes that the other members of the team are "out to get them" will never be successful.



Slide 14

ADVANCE to slide 14 of the PowerPoint presentation.

SAY:

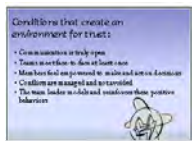
As a first step toward building trust among your team members, establish an environment in which the following characteristics are fostered.

READ ALOUD:

- Tolerance
- Responsibility
- Understanding
- Sharing of Ideas
- Togetherness

ASK:

- What questions do you have about these?



Slide 15

SAY:

Once again, this might be easier said than done. These characteristics are most likely to develop within a team when the following conditions exist.

ADVANCE to slide 15 of the PowerPoint presentation.

READ ALOUD:

- Communication is truly open
- Teams meet face-to-face at least once
- Members feel empowered to make and act on decisions
- Conflicts are managed and not avoided
- The team leader models and reinforces these positive behaviors

ASK:

- What stage of team development do you need to begin prompting trust among team members?
CORRECT ANSWER: FORMING
- What questions do you have so far?

SAY:

Well, obviously there are some challenges associated with this process but if you know how important it is, and can identify some of the roadblocks that you are likely to face, you'll be much more prepared to handle the difficult times more effectively.

Let's see if we can't capture some of those things now.

DIVIDE the class into three groups.

SAY:

In just a moment, we are going to do an activity called a gallery walk.

HAVE each of the groups stand next to one of the Trust Challenge charts that are posted around the room.

SAY:

When I say “go”, the members of your group should begin brainstorming ideas to answer the question at the top of your chart paper.

When you hear the break bell sound, you will rotate to the next chart and do the same thing.

Once each group has had an opportunity to answer all three questions, we’ll discuss them as a group.

ASK:

- What questions do you have?

SAY:

OK, you may begin.



ALLOW approximately 20 minutes for group work.



Page 17

RECONVENE the group when the activity is complete.

HAVE the participants turn to page 17 of their participant guides.

INVITE the participants to take notes as the charts are reviewed.

HAVE one member from each group read the responses from the chart paper closest to him or her.

ASK:

- How are we going to overcome these barriers and challenges so that we don't end up with a team like the one represented on the first chart here?

SAY:

I'm going to give you an opportunity to explore several different activities that will help you do just that and then I'll give you an opportunity to teach them to the rest of the class.



DISTRIBUTE a large envelope containing the Trust Activities to each of the table groups.

SAY:

In each of these envelopes are several different activities that you can use with your teams in order to develop and/or enhance the level of trust that exists among them.

Some of them are conducive to team meetings, while others are activities that you would do during a team building session.

Your task is to review the activities with the other members of your table group and pick at least two that you are going to teach to the rest of the class.

I would highly recommend that you get as creative as possible with this. In other words, I don't want you to simply stand up and read the directions to the group. Instead, act it out, make the class perform the activity, etc.

All team members must be involved in some capacity. You can use whatever resources you have available in the classroom and if there is anything else you would like to use, just ask me and I'll see if I can find it for you!

We will spend about 30 minutes preparing for this activity.

ASK:

- What questions do you have?

SAY:

OK, you may begin.



ALLOW approximately 30 minutes for group work.

RECONVENE the class when the preparation is complete.

INVITE each team to lead the class through the activities they selected.



Page 18

DISTRIBUTE copies of all of the activities to the each of the participants.

HAVE the participants turn to page 18 of their participant guides.

SAY:

All of the activities that we've discussed today, and the others that you'll find in this packet will help you to develop higher levels of trust among your team members. There are, of course, many, many others that you could do as well.

Keep the questions on page 18 in mind when you are selecting and developing activities to help build trust:

- Who are our team members (what are our strengths/weaknesses, skills/deficiencies, interpersonal assets /shortcomings, etc.)?
- What is our goal/purpose?
- What do we contribute?
- How can we work together?

ASK:

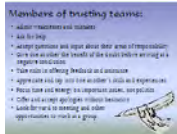
- What are some other activities that you have facilitated or participated in to build trust?



INVITE the participants to jot down some ideas in the space on page 18.

ASK:

- So, how will you know when your team has developed a high level of trust?

**Slide 16**

ADVANCE to slide 16 of the PowerPoint presentation.

READ ALOUD:

Members of trusting teams:

- Admit weaknesses and mistakes
- Ask for help
- Accept questions and input about their areas of responsibility
- Give one another the benefit of the doubt before arriving at a negative conclusion
- Take risks in offering feedback and assistance
- Appreciate and tap into one another's skills and experiences
- Focus time and energy on important issues, not politics
- Offer and accept apologies without hesitation
- Look forward to meeting and other opportunities to work as a group

ASK:

- What questions do you have about trust?

TRANSITION:

We will come back to trust time and time again throughout the class because it truly is the foundation for effective teams.

With that being said, let's move on to our next topic, communication.

Incorporating Effective Communication

Effective Communication

SAY:

Before we jump into the content of this module, I'm going to give you a little problem solving activity to help clear your mind of the last section and let you have a little fun for a few minutes.

ASK:

- Sound good?

SAY:

In just a moment, I'm going to give each table a puzzle to work on. This is an activity of speed so as soon as you get the puzzle, you should begin putting it together. The table team who finishes first will earn a *valuable* prize!

ASK:

- Make sense?
- What questions do you have?



DISTRIBUTE a Communication Puzzle to each table group.
THE PUZZLE PIECES HAVE BEEN DIVIDED UP SO THAT TWO OF THE PUZZLE PIECES THE TEAM NEEDS IS IN AN ENVELOPE AT A DIFFERENT TABLE. IN ORDER TO COMPLETE THE ACTIVITY, THE TEAMS MUST FIGURE OUT WHERE THEIR MISSING PIECES ARE.

ALLOW approximately 10 minutes for group work.

CIRCULATE as the groups work to observe the dynamics. Do not provide any insight as to the whereabouts of the missing pieces and keep reminding them that the team who finishes first wins a *valuable prize* in order to create a sense of urgency, frustration and chaos.

RECONVENE the class when the puzzles are complete and the class has figured out that they needed to seek out their missing puzzle pieces from other members of the class.

THE CLASS MUST FIGURE THE ACTIVITY OUT ON THEIR OWN. IF IT TAKES LONGER THAN 10 MINUTES, ALLOW THEM TO KEEP WORKING!

ASK:

- What happened here?
- How did you feel?

POSSIBLE ANSWERS: FRUSTRATED, CONFUSED, ETC.

SAY:

So, what sounds like what we have here, is failure to communicate! Or, at the very least, communication that is not as effective as it could have been!

ASK:

- What were you lacking in this activity?
INFORMATION, DIRECTION
- What would have made this process easier?
BETTER DIRECTION, TELL US THAT WE NEEDED TO WORK TOGETHER, ETC.
- Have you ever experienced this at work?

- What are the risks associated with lack of effective communication in a virtual environment?

SAY:

Practicing effective communication, yourself, is not enough in a virtual environment. As a leader, you need to create an environment of open, effective communication among all of your team members if you expect them to work effectively as a group.

In order to go there, let's talk a little bit about what communication really is, and what its intent is.



Page 19

HAVE the participants turn to page 19 of their participant guides.

SAY:

Take a few moments to read the information on page 19 and highlight anything that stands out to you.



ALLOW a few moments for individual reading and highlighting.

Effective Communication

Model	Knowledge	Relationships
Model	Process	Process
Model	Relationship	Relationship
Model	Relationship	Relationship
Model	Relationship	Relationship

Slide 17

ADVANCE to slide 17 of the PowerPoint presentation.

ASK:

- Who can explain this to the class?

HAVE a member of the class explain the model.

SAY:

So, what we are really talking about here is building relationships and a large part of that goes back to trust within in the group.

ASK:

- How likely are you to speak up about something if you don't believe it will be heard or accepted by the group?
- What about if you are afraid of "rocking the boat" so you don't bring something up?
- Does this make sense?

SAY:

So, in order to set the stage, before you can implement any of the tools that are generally associated with effective communication, you must begin building that relationship of trust within the group.

Unfortunately, the challenge does not end there. There are some other things that make communication challenging in a virtual environment.



REFER TO the chart labeled "Communication".

SAY:

There are 3 primary ways in which we communicate with others: body language, voice tone, and words.

ASK:

- How do you think that each of these three methods of communication impact the message that you are conveying? (Based on percentages.)

CHART the ideas in a light colored marker, or highlighter, as they are given.

SAY:

Research has shown that **55%** of your communication's impact is based on body language, **38%** on voice tone and **7%** is based on the actual words that you use. (*Source: Albert Mehrabian, Silent Messages, 1981.*)

ASK:

- Does this sound right to you?

- Now, given the fact that we are working in a virtual environment, what happens to our ability to use body language to convey our message?

CORRECT ANSWER: IT'S OUT THE WINDOW, IT DOESN'T APPLY



Page 20

HAVE the participants turn to page 20 of their participant guides.

SAY:

Communicating in a virtual environment greatly diminishes the rich subtext of information we receive from body language and verbal cues.

Additionally, participating in online meetings requires more risk-taking and more thoughtful presentation of ideas in order to be effective.

Furthermore, managing multiple sources of information (team Web sites, Communities of Practice, Intranet sites, e-mail, etc.) can be intimidating and difficult to stay on top of.

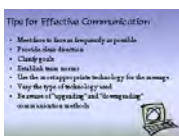
As a result, it is important for team leaders to monitor individual participation and help team members overcome any challenge and/or resistance they might have toward effective team communication.

ASK:

- So, what can you do to improve communication in a virtual environment?



INVITE the participants to jot down some ideas on page 20 of their participant guides.



Slide 18

ADVANCE to slide 18 of the PowerPoint presentation.

READ ALOUD:

Some tips for effective communication are:

- Meet face to face as frequently as possible
- Provide clear direction
- Clarify goals
- Establish team norms
- Use the most appropriate technology for the message
- Vary the type of technology used
- Be aware of "upgrading" and "downgrading" communication methods

ASK:

- What questions do you have about these?
- Are there others that belong here?

SAY:

One of the other tools that can be very effective in a virtual environment is to develop a communication infrastructure that addresses issues related to how updates will be done, what information should be passed on, what decisions should involve everyone, etc.

Communication Infrastructure	
Team	
Project	
Client	
Vendor	
Partner	
Stakeholder	
Internal	
External	
Formal	
Informal	
Written	
Verbal	
Visual	
Audio	
Video	
Text	
Image	
Diagram	
Table	
Chart	
Slide	
Document	
Meeting	
Workshop	
Webinar	
Podcast	
Blog	
Forum	
Wiki	
Collaboration	
Communication	
Infrastructure	

Slide 19

ADVANCE to slide 19 of the PowerPoint presentation.

SAY:

This is one example of a communication infrastructure that can be used for a virtual team.

Although each team should use the format that works best for their needs, all communication infrastructure should be:

- Standardized
- Organized
- Timely
- Easy

**Page 21**

HAVE the participants turn to page 21 of their participant guides.

SAY:

Take a few moments to jot down some ideas regarding the type of communication infrastructure you will develop for your team.

You can use the example here, modify it to fit your needs, or create something totally different. . . whatever works for you! Just be sure to include enough detail so that everyone on the team knows exactly what to expect.



ALLOW a few minutes for individual work.

CIRCULATE as the group is working to answer questions and re-direct when necessary.

RECONVENE the group when the communication infrastructures are complete.

HAVE one or two of the participants share their infrastructure with the class.

ASK:

- What questions do you have?
- What are the advantages of using this kind of tool?
- Is this something that you can use?

TRANSITION

Well, so far we've talked about building trust and incorporating tools for effective communication. The next topic is navigating cultural diversity.

Let's take a look at that now.

Navigating Cultural Diversity



Navigating Cultural Diversity

HAVE the participants turn to page 22 of their participant guides.

SAY:

A diverse employee body is valuable for many reasons. It reflects the population, in which the company operates, provides better sensitivity to customers and suppliers, helps generate a variety of ideas and perspectives, and aids in keeping the organization fresh and responsive.

ASK:

- What do we mean when we refer to a diverse employee body?

SAY:

Many people think that diversity refers exclusively to cultural and/or racial differences between people. Although this is certainly a part of it, there are many, many other things that make us diverse.

This can be especially true among virtual teams since they are not generally all located in the same place.

ASK:

- What are some examples of diversity that you might encounter in a virtual team?
EXAMPLES MIGHT INCLUDE: TIME ZONE DIFFERENCES, SENSE OF URGENCY, DIRECTNESS VS INDIRECTNESS, PROMPTNESS, COMMUNICATION PREFERENCES, INTROVERT VS EXTROVERT, CUSTOMER FOCUS, BUSINESS OR SOCIAL FOCUS, ETC.



Page 23

- How do you handle these types of differences in a team environment so that you can remain productive and effective?

HAVE the participants turn to page 23 of their participant guides.

SAY:

Take a few moments to read the information on page 23 and highlight anything that stands out to you.



ALLOW a few minutes for individual reading and highlighting.

RECONVENE the group when they have finished reading.

ASK:

- What do you think about this?
- Have you found this to be true?

SAY:

We cannot really expect people to change certain things about themselves. For example, if someone is a raging introvert, they might always remain a raging introvert. However, there are still things we can do. First, we can change our own behavior. We might have to make a conscious effort to engage that introvert during brainstorming sessions by saying: "Bob, what do you think about this?", for example.

When teams develop a high level of trust and respect, navigating diversity becomes much easier because teams are open in their communication and trust one another to have positive intent.

For example, if someone has a tendency to be very direct and it becomes an issue for the team, the issue can be openly addressed and discussed and solutions can be agreed upon by the team.

If, however, the team does not trust one another, suspects ulterior motives, or avoids conflict, small issues such as this one, remain unaddressed and unresolved and ultimately impact performance.

ASK:

- Does this make sense?

SAY:

OK, we've been sitting for a while now so, let's get up and move around a little bit. We're going to do a little brainstorming.

DIVIDE the class into two groups.

DISTRIBUTE a pack of colored post-it notes to each group.



REFER TO the easel charts at the front of the classroom.

SAY:

At the front of the room, there are two easel charts. The first one posts the question:

- What happens when teams are not sensitive to the cultural diversity among team members?

The second one:

- What are the benefits of having diverse perspectives on a team?

In just a moment, when I say go, each group is going to brainstorm ideas to answer each of these questions.

Each question should be written (legibly) on a post-it note and then one member of the team will run up and stick it on the appropriate chart.

When I call time, the team with the most post-it notes on each chart (based on color) will be declared the winner!

ASK:

- Does this make sense?
- What questions do you have?
- Are you ready to begin?

SAY:

OK, you may begin!



ALLOW approximately 7 – 10 minutes for group work.

RECONVENE the class when the activity is complete.

HAVE one member from each team count up the number of post-it notes they placed on each chart and declare the winners.

WALK THROUGH the responses posted on the charts and eliminate any duplicates. Discuss the points and clarify ideas as the items are reviewed.

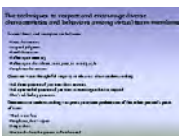


INVITE the participants to jot down ideas on page 23 of their participant guides.



Page 24

HAVE the participants turn to page 24 of their participant guides.



Slide 20

ADVANCE to slide 20 of the PowerPoint presentation.

SAY:

You can use the following five techniques to establish a climate of respect and encourage diverse characteristics and behaviors among virtual team members:

READ ALOUD:

- Listen – hear and interpret verbal cues
 - ♦ Resist distractions
 - ♦ Suspend judgment
 - ♦ Recall the content
 - ♦ Reflect upon meaning
 - ♦ Reflect upon the volume, tone, pace, or writing style
 - ♦ Paraphrase the content

- Question – use thoughtful inquiry to obtain a clear understanding
 - ♦ Ask direct questions if you want short answers
 - ♦ Ask open-ended questions if you want to encourage others to respond
 - ♦ Don't ask leading questions



Slide 21

- Demonstrate understanding – express your comprehension of the other person’s point of view
 - ♦ Think it out first
 - ♦ Paraphrase, don’t repeat
 - ♦ Keep it short
 - ♦ Use words the other person will understand

ADVANCE to slide 20 of the PowerPoint presentation.

READ ALOUD:

- Give your perspective and disclose who you are - present your view in an honest, straightforward and clear manner
 - ♦ Organize your viewpoint
 - ♦ Present your viewpoint
 - ♦ Demonstrate understanding of the reaction to your viewpoint

- Manage conflict – resolve differences in a way that results in a win-win outcome
 - ♦ Identify values
 - ♦ Expand alternatives
 - ♦ Select the best alternative

ASK:

- What other ideas do you have to help establish a climate of respect and encourage diverse characteristics?

- What questions do you have?

- Do you see how all of these things work together?

- Are you ready to look at the final one?

TRANSITION

All of the things we've discussed so far in this class will help you to create an environment in which your team can be effective, productive and perform at high levels. If you've done a good job, as a leader, at creating this environment, the next section will become much easier.

We're talking about managing performance and accountability!

Managing Performance and Accountability

SAY:

Although the previous topics will make this job much easier for you, there will always be a need for the leader of a team to keep close tabs on performance and accountability.

There will also, inevitably be those employees who require a little extra attention, or even corrective action at times.

Therefore, it's a good idea for us to talk a little bit about it!



HAVE the participants turn to page 25 of their participant guides.

SAY:

Go ahead and take a moment to read the paragraph at the top of page 25 and highlight anything that stands out to you.



ALLOW a few moments for individual reading and highlighting.

ASK:

- How do you feel about relinquishing control?
- Why?

SAY:

In a virtual environment, in it nearly impossible for you to be in total control. If that is your expectation, you will spend a lot of time being very frustrated in your job!

What you will need to do is trust your employees to be doing what they should be doing, communicating openly and frequently about what is happening, and recognizing that, although everyone might not do things the way you would do them, they are not necessarily doing them wrong.

This can be very scary for some leaders who are used to having complete control of everything their employees do.

ASK:

- Do you see why it is so important that you do all of the things we've been discussing thus far?

SAY:

A lot of people think that our previous topics are just warm and fuzzy stuff. In fact, it is the only way you will be successful in a virtual environment.

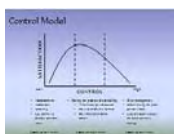
You can't afford to put these things off because "there is too much work to be done". If you don't establish these organizational dynamics in your team, you will not get ANY work done!

ASK:

- Make sense?

SAY:

Let's take a look at a model that puts this into perspective.



Slide 22

ADVANCE to slide 22 of the PowerPoint presentation.

SAY:

Think about your employee's job satisfaction as compared to the amount of control you exhibit over the team.

If there is too little control, the team feels:

- Abandoned
- Abdication
- Uncared about
- That you have a low desire to disclose personal views

This, in turn, leads to low trust.

On the other hand, if control is too high, the team feels:

- Over managed
- That you've undervalued their ideas
- That you have a lack of concern about their feelings

This also leads to low trust.

So, what you need is a balance. One that allows the team to feel as if they are a part of the process of control within the team. This allows them to feel a part of:

- What issues get discussed
- How solutions are formed
- How implementation occurs

ASK:

- Does this make sense?

SAY:

Virtual team members must have much more independence and decision-making capability than people typically do in bureaucracies and to a large extent, must learn to self-manage. Some sources go as far as to say that if an environment of trust and open communication has been established, the most effective and efficient means of maintaining high standards of performance on a team is peer pressure.

ASK:

- What do you think about that?
- Who can give me an example of how they have seen this to be true?
- So, how do you go about establishing this kind of environment?



HAVE the participants turn to page 26 of their participant guides.

SAY:

Let's talk about what it means to be accountable!

ASK:

- We've already established that you cannot be everywhere at once, right?
- Are there any superheroes in the room that we're not aware of?
- So, it is safe to say that it is impossible for you to see what every member of the team is or isn't doing at every minute of the day, right?

SAY:

The dictionary defines accountability as "liable to being called to account; answerable."

In a team environment, this can be extrapolated by saying it is the willingness of team members to call their peers on performance or behaviors that might hurt the team.

ASK:

- Would you agree with that?

SAY:

In order for team members to feel comfortable holding each other accountable, they must have high levels of trust because without it, people have a general tendency to avoid interpersonal discomfort and difficult conversations.

ASK:

- Why do team members avoid interpersonal discomfort and difficult conversations?
- What are some strategies for overcoming these issues?



INVITE the participants to jot down ideas on page 26 of their participant guides.



Page 27

HAVE the participants turn to page 27 of their participant guides.

ADVANCE to slide 23 of the PowerPoint presentation.

READ ALOUD:

Some recommended techniques for creating an environment of high performance and accountability among virtual team members include:

- Publicly posting team goals and standards
- Clarifying team roles and responsibilities

- Engaging in rotated, shared, or distributed leadership responsibilities
- Facilitating simple and regular process reviews
- Aligning behaviors with rewards and recognitions
- Encouraging and allowing the team to serve as the first and primary accountability mechanism

ASK:

- What are some other things you can think of that would help with establishing accountability and high performance?

SAY:

There is one other thing that you can do that will help you in all areas of effective virtual leadership that you did not have the ability to do prior to this class.

ASK:

- Does anyone know what that is?

SAY:

You now all have the ability to call each other to ask for support, help and ideas about how to handle tough situations.

You've created a network of virtual leaders over the past two days, and I really hope that you capitalize on that resource.

In order to get you started, I'm going to give you an opportunity to capture each other's contact information.



Page 28

HAVE the participants turn to page 28 of their participant guides.

SAY:

Go ahead and write your name at the top of the page so that you can make sure you get your book back!

When I say go, I want you to pass your book to the person to the right of you. When you get a new book in front of you, write down your contact information in that book. Once you are done, pass it on to the next person.

Once everyone at your table has filled out your book, we'll collect all of the books at the table and pass them on to the next table.

We'll continue this process until all of the books have been filled out.

If you would prefer, if you have business cards with you, you can simply paperclip your business card to each book. I'll give everyone a paperclip to put at the top of their book for this purpose.

ASK:

- Does this make sense?

DISTRIBUTE a paperclip to each participant.



ALLOW approximately 10 minutes for capturing the network of support.

RECONVENE the group when the group work is complete.

SAY:

Everything that we've discussed over the past two days is simply academic until you put it into practice.

With that in mind, I'd like you to take a few minutes before you go back to the "real world" and get sucked back in to the "same old stuff" to think about and write down exactly what you are going to do differently as a result of having attended this course.



Page 29

HAVE the participants turn to page 29 of their participant guides.

SAY:

Take about 10 minutes to capture your individual action plans.



ALLOW approximately 10 minutes for individual work.

RECONVENE the class when the action plans are complete.

HAVE one or two participants share something that they have committed to doing differently as a result of having attended the course.

SAY:

Thank you all for attending this course! If there is anything I can do to be of assistance to you in the future, don't hesitate to ask!

Chapter 5

DISCUSSION

Project Synopsis

The purpose of this project was to develop a training intervention to assist managers and supervisors of virtual teams increase the effectiveness of their leadership competencies. In order to develop the core curriculum, a variety of leadership skills and techniques were identified, evaluated, and validated through a sample of the research that has been published on the subject. It is the researcher's belief that improving upon the leadership qualities proposed in this project will result in an increase of team performance which, in turn, will positively impact business results.

The need to examine ways of increasing virtual leadership effectiveness provided motivation for this project and was initiated by the target audience's corporate merger which resulted in the reorganization and realignment of company resources. Chapter One introduced the initial training request that stimulated the researcher's interest in the topic in addition to the results of the needs analysis that was conducted to confirm a performance gap within the target audience.

A review of related literature was presented in Chapter Two. This review resulted in the identification of the four fundamental categories of performance that the researcher recommended as the core curriculum for the training program: building trust, incorporating effective communication, navigating cultural diversity, and managing performance and accountability. Chapter Three presented a rationale for the selection of a training intervention, as opposed to a non-instructional intervention alternative, an overview of the project design, an outline of the instructional plan, and the incorporated

strategies for motivating adult learners. The plan was designed in accordance with Morrison, Ross, and Kemp's (2004) Instructional Design Model.

The project deliverables were presented in Chapter Four, including a complete Participant Guide and Facilitator Guide for a training program entitled: *Effectively Managing a Virtual Workforce*. In the final chapter, the project contributions, limitations, and implications and suggestions for further research will be discussed from the point of view of the researcher.

Contributions

It is the researcher's belief that the training program created in this project is a beneficial introductory course into implementing strategies to overcome the challenges associated with effectively leading a team in a virtual environment. The themes and patterns that emerged from the Virtual Leadership Questionnaire conducted in the preliminary stages of the project helped drive the design of the core curriculum, guided by the following questions:

- How can team leaders establish high levels of task-based and interpersonal trust in an environment that allows minimal face-to-face interaction among team members?
- How can team leaders incorporate effective communication strategies that will encourage collaboration among team members and regulate ambiguity?
- How can team leaders encourage cultural sensitivity among virtual team members and capitalize on the benefits that such diversity imparts?
- How can team leaders maintain a consistent, equitable process for managing the productivity of all team members in order to engender an environment of accountability and high performance?

At the onset this initiative, there were no course offerings in the target audience's training catalog regarding virtual leadership skill development. Therefore, this instructor-

led, classroom-based training course provided a unique opportunity for leaders of virtual teams to assemble together in a safe environment in order to discuss the key challenges being faced, share best practices, and learn new strategies for increasing their leadership effectiveness. Based on the fundamental understanding that experience plays a critical role in learning in adulthood, as underscored by the works of Kolb, Knowles, Barnett, Caffarella, and numerous other scholars in the profession of Adult Learning and Development, a forum of this nature was essential to successful implementation of virtual teaming.

The training program was designed around Kolb's learning cycle (1984, as cited in Merriam & Caffarella, 1999). This training program, in accordance with Kolb's model, provides the participants with an opportunity to: participate in real life simulations and share concrete experiences; have time to reflect on those experiences and make observations about their actions; conceptualize what was learned from the experience and what the future implications of the experience might be; and finally, consult with their peers in order to develop a plan for future action. Until the introduction of this course, this opportunity was not available to the target audience.

Limitations

Despite the numerous positive first steps toward the implementation of effective virtual leadership that this project presented, many limitations existed simultaneously. The limitations that will be discussed in this section include: time, resources, and the need for the progressive delivery of competencies.

Time

In order for front-line supervisors and managers to attend classroom-based training courses, they must be able to spend time away from their offices, their teams, and their day-to-day responsibilities. While an indisputable case can be built for the face-to-face interaction an instructor-led course provides and although most upper-level executives will acknowledge the benefits of such training, the process is very time-consuming, and time is a commodity that most organizations do not have.

Therefore, a course which could have easily been developed into a six week or longer session was designed to be facilitated in two days in order to limit any perception of negative impact on business needs. Despite the documented evidence that training increases business results, many executives continue to view it as a non-essential element to high performance. In order to gain approval for an instructor-led format, therefore, a condensed timeframe was essential to obtaining buy-in. The repercussions of this, however, involved streamlining and/or modification of content so that all of the identified competencies could be addressed in the timeframe allotted.

In addition to upper management and executive-level resistance to an instructor-led training format, some supervisors and managers, themselves, hold the perception that training is not a valuable use of their time. In order for a course of this nature to be effective, the participants must see value in the material and be willing to invest the time and energy, in class, to obtain new skills and then be committed to exhibiting the necessary time and energy, post class, to implement those skills and strategies.

Because of the high demands of an ever-changing, high volume, vigorous work environment, many members of the targeted audience, in the past, have elected to decline

training and development opportunities in order to tend to business needs. Others, have attended courses only to return to their “same old routine” once the class was completed, stating that they “did not have time” to implement the recommended tools and techniques presented in the course. Time is, therefore, one of the primary limitations to the development of effective training materials and the success of the materials that are implemented.

Resources

For many of the same reasons that time was a limitation in the target audience’s environment, limited resources also posed a significant challenge to the development of this project. First, funding was limited to materials that could be created “in-house.” As a result, assessments and inventories such as the *Myers-Briggs Type Indicator* instrument (Myers and Briggs Foundation), the *DiSC* Profile system (Inscape Publishing), or the *Insight Inventory* assessment (HRD Press, Inc.) which could have served as valuable tools for assisting the participants in understanding their own competencies, behaviors, and personality traits, which influence their ability to effectively lead a virtual team, in addition to pre-fabricated supplies, supporting documentation, multi-media equipment and other such materials were inaccessible to the researcher.

Second, the level of support, or lack thereof, from upper management and executives for a course of this nature, presents a limitation to the overall success of the project. As aforementioned, many executives continue to view training as a non-essential element to high performance. Therefore, it is difficult for them to provide support and coaching, or to set expectations regarding the application of the tools presented in

training if they have not attended the course themselves, in order to understand appropriate methods of reinforcement.

Until complete buy-in for the concepts, tools, and techniques presented in the core curriculum of the training program are fully embraced by the organization, as a whole, that level of non-commitment will continue to be a limitation to the potential success of the project. This limitation is closely linked to the aforementioned one related to time.

Progressive Competencies

As a result of the abovementioned limitations, each of the four fundamental categories of performance have been presented and examined over the course of the two classroom sessions allotted for this training program. This allows for inadequate time to be spent on each of the competencies and provides only a cursory overview of the complexities that each competency entails.

Ideally, the class would be better structured in a format that would allow for the competencies to be presented in a progressive format, allowing time for implementation and active experimentation with each competency in isolation, allowing the participants to build and expand upon their skills over time. It is the researcher's recommendation that the course be formatted for delivery in the following manner:

Session Number	Topics Covered	Timing
1	<ul style="list-style-type: none"> ▪ ABC Aerospace Corp activity ▪ Course Introduction ▪ Team Assessments ▪ Self-Assessments ▪ Four Stages of Team Development ▪ Introduction to the Four Organizational Dynamics for Effective Virtual Teams ▪ Action Planning 	8 hours – to be scheduled at the convenience of the business and the participants

2	<ul style="list-style-type: none"> ▪ Introduction to Building Trust ▪ Building Trust simulations and activities ▪ Action Planning 	8 hours - to be facilitated the day following session 1
3	<ul style="list-style-type: none"> ▪ Introduction to Incorporating Effective Communication Techniques ▪ Communication simulations and activities ▪ Action Planning 	8 hours – to be facilitated one week following session 2
4	<ul style="list-style-type: none"> ▪ Introduction to Navigating Cultural Diversity ▪ Cultural diversity simulations and activities ▪ Action Planning 	8 hours – to be facilitated one week following session 3
5	<ul style="list-style-type: none"> ▪ Introduction to Managing Performance and Accountability ▪ Managing Performance and Accountability simulations and activities ▪ Action Planning 	8 hours – to be facilitated one week following session 4
6	<ul style="list-style-type: none"> ▪ Review of Competencies ▪ Sharing of experiences and/or challenges ▪ Sharing of best practices ▪ Celebration of accomplishments 	2 hours – to be facilitated one month following session 5
7	<ul style="list-style-type: none"> ▪ Review of Competencies ▪ Sharing of experiences and/or challenges ▪ Sharing of best practices ▪ Celebration of accomplishments 	2 hours – to be facilitated one month following session 6

Conclusions and Implications

Conclusions

The results of the project suggest that there is a need for more training in the realm of increasing the effectiveness of virtual leaders within the target audience. This conclusion is supported by the expression of a *felt* need for training on this topic by

supervisors and managers within the organization, as well as from the results of the Virtual Leadership Questionnaire that was conducted at the onset of the project.

The respondent's comments from the Virtual Leadership Questionnaire that suggest validity in the virtual leadership training request include the following:

- This is a topic that really does need to be explored and talked about more. There are different challenges with leading virtually.
- I really think as managers we need more direction, resources, and training on leading and motivating virtual teams.
- I don't believe remote program managers are as effective as those that are based [in conventional teams].
- The issue for remote teams is the lack of information for a new manager on how to effectively manage a team of people remotely. There needs to be a list of tools that the company supplies to a person who is part of a remote team.
- Current budget issues are making it challenging to lead virtual teams.
- With travel dollars being cut from budget managing a virtual team is going to become tough as you do need the occasional face to face [interaction].
- Very challenging to [lead a virtual team] effectively.

Implications

Because virtual leadership has become increasingly prominent in recent years and is emerging as one of the most common trends of today's corporate culture, organizations may find themselves falling behind the industry standards if they do not invest the time and effort to enhance the effectiveness of their virtual leaders. The research cited throughout this project suggests that a virtual leader's inability to establish trust among their team members, communicate effectively, navigate cultural diversity and manage team members' performance and accountability will result in their teams operating at

standards of performance that are well below those of the teams headed by leaders who are effective in managing these organizational dynamics.

Additionally, the results of this project might imply that individuals who have proven to be effective virtual leaders possess certain intrinsic characteristics, behaviors, and/or personality traits that enable success. If this is the case, it is the recommendation of the researcher that organizations begin to modify their recruiting and hiring processes for virtual leadership positions from those that are in place for conventional, co-located team leadership positions. Further research is needed in order to substantiate this recommendation.

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APPENDIX A

Virtual Leadership Questionnaire

1. The following range best depicts the amount of leadership experience I possess:
 - Less than one year
 - 1-3 years
 - 3-5 years
 - 5-10 years
 - Over 10 years

2. The following range best depicts the amount of **virtual** team leadership experience I possess:
 - Less than one year
 - 1-3 years
 - 3-5 years
 - 5-10 years
 - Over 10 years

3. The following range best represents the number of my employees who can be considered virtual workers (do not work in the same office as me):
 - 1-5
 - 5-10
 - 10-15
 - 15 or more

4. I meet face-to-face with my virtual team members:
 - At least once per month
 - Once every 3-6 months
 - Once per year
 - Less than once per year
 - I have never had a face-to-face meeting

5. My virtual team has participated in this number of *structured* team building sessions (this excludes get-togethers such as bowling, laser tag, etc.):
 - 5 or more
 - 2-5
 - 1
 - My team has never participated in a *structured* team building session

6. My feelings about the level of challenge associated with effectively leading a virtual team, compared to leading a conventional, co-located team can be best described as:
 - It is **much more** challenging to lead a **conventional** team
 - It is **somewhat more** challenging to lead a **conventional** team
 - It is **equally** challenging to lead a virtual team and a conventional team
 - It is **somewhat more** challenging to lead a **virtual** team
 - It is **much more** challenging to lead a **virtual** team

7. I believe I receive this level of performance from my virtual team:
 - Very high level of performance
 - Moderately high level of performance
 - Average level of performance
 - Low level of performance

8. Enhancing the performance of my virtual team is:
 - Very important
 - Important
 - Somewhat important
 - Not very important

9. The most frequent mode of communication I use with my virtual team is:
 - One-on-one telephone conversations
 - Conference calls
 - E-mail
 - Internet forums/Web sites/Communities of Practice
 - Videoconferencing

10. I am aware of, and know how to use, the different forms of technology (some of which are listed in question 9) that can help me to facilitate better communication within my team:
 - Strongly agree
 - Agree
 - Not sure
 - Disagree
 - Strongly disagree

11. I believe the amount of communication I share with my virtual team is:
- Excellent
 - Above average
 - Sufficient
 - Somewhat lacking
 - Needs improvement
12. I believe the amount of communication I *receive* from my virtual team is:
- Excellent
 - Above average
 - Sufficient
 - Somewhat lacking
 - Needs improvement
13. I am concerned that members of my virtual team might take advantage of not having on-site management by coming in late, leaving early, cutting inappropriate corners, etc.:
- Strongly agree
 - Agree
 - Not sure
 - Disagree
 - Strongly disagree
14. I have been provided with the training I need in order to effectively manage team members who come in late, leave early, cut inappropriate corners, etc.:
- Strongly agree
 - Agree
 - Not sure
 - Disagree
 - Strongly disagree
15. In terms of both interpersonal and professional topics, I feel my virtual team **usually** communicates (select all that apply):
- Very freely and openly regardless of topic
 - Very freely and openly regarding professional (business related) topics
 - Somewhat guarded regarding interpersonal topics
 - Somewhat guarded regarding professional (business related) topics
 - Somewhat guarded regardless of topic
 - Very guarded regardless of topic

16. The way my virtual team **usually** handles conflict can be best described as:
- Conflict is discussed openly, honestly and resolution is easily achieved
 - Most conflict results in some form of compromise
 - Competition ensues and emotion often escalates
 - Conflict is ignored and resolution is not reached
 - Some team members always seem to give in to other's ideas
17. My level of task-based trust with my virtual team can be best described by the following statement:
- When tasks are delegated, I am confident that the project will be completed accurately, effectively and on time
 - I am only confident that *certain* team members will complete projects accurately, effectively and on time
 - I know that most projects will need corrections and I consistently have to remind team members about deadlines
 - I might as well do the work myself, as my team won't get it done
18. My perception of my virtual team's level of task-based trust among themselves is best described by the following statement:
- They all trust one another to get the job done
 - Some of them trust certain team members but not all team members
 - There are significant reservations among team members regarding each other's ability/desire/willingness to get the job done
 - No one trusts that anyone will get the job done
19. My level of interpersonal trust with my virtual team members can be best described by the following statement:
- My team members would not hesitate to call me if they were even remotely concerned about an interpersonal issue
 - My team members would call me, but only after discussing it with a third party to get confirmation that it would be OK for them to call me
 - My team members would try to resolve their issue with a third party and only call me if the situation *really* required them to do so
 - My team members would not ever call me with an interpersonal issue

20. My perception of my virtual team's level of interpersonal trust among themselves is best described by the following statement:
- All of my team members would feel comfortable calling any of the other members of the team with an interpersonal issue
 - Most of my team members would feel comfortable calling other team members with an interpersonal issue
 - Very few of my team members would feel comfortable calling other team members with an interpersonal issue
 - None of my team members would feel comfortable calling other team
21. I believe there are cultural (geographical, interpersonal or other.) issues within my virtual team that makes it difficult for all team members to work together:
- Strongly agree
 - Somewhat agree
 - Neither agree nor disagree
 - Somewhat disagree
 - Strongly disagree
22. I have **specific** strategies and methods for navigating cultural differences within my virtual team:
- Strongly agree
 - Somewhat agree
 - Neither agree nor disagree
 - Somewhat disagree
 - Strongly disagree
23. I believe I receive all of the support and/or tools necessary for me to effectively lead my virtual team to high performance:
- Strongly agree
 - Somewhat agree
 - Not sure
 - Somewhat disagree
 - Strongly disagree
24. The following are my top three topics of concern (and/or challenge) as it relates to effectively leading my virtual team (please select three):
- Building trust
 - Incorporating effective communication
 - Managing productivity
 - Navigating cultural differences
 - Managing accountability
 - Other (please specify: _____)

25. I feel confident that I am an effective virtual team leader:

- Strongly agree
- Somewhat agree
- Not sure
- Somewhat disagree
- Strongly disagree

APPENDIX B

Virtual Leadership Questionnaire Results

1. The following range best depicts the amount of leadership experience I possess:

Less than one year	0	0%
1-3 years	8	15%
3-5 years	6	12%
5-10 years	17	33%
Over 10 years	21	40%
Total	52	100%

2. The following range best represents the number of my employees who can be considered virtual workers (geographically located and rely primarily or exclusively on electronic forms of communication in order to work toward a common set of goals):

1-5	19	37%
5-10	24	46%
10-15	2	4%
15 or more	7	13%
Total	52	100%

3. The following range best depicts the amount of virtual team leadership experience I possess:

Less than one year	11	21%
1-3 years	9	17%
3-5 years	16	31%
5-10 years	13	25%
Over 10 years	3	6%
Total	52	100%

4. Please rank the following topics in terms of how challenging it is to effectively lead a virtual team. For this scale, 1 indicates the most challenging aspect and 4 indicates the least challenging aspect:

Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	1	2	3	4
Building trust (interpersonal and/or task-based)	14 36%	7 18%	9 23%	9 23%
Incorporating effective communication (i.e. frequency of meetings, varying technological methods, etc.)	8 24%	9 27%	8 24%	8 24%
Navigating cultural differences (might include challenges associated with different regions, time zones, organizational norms, etc)	8 19%	17 40%	7 16%	11 26%
Managing performance and accountability (productivity, workflow, etc.)	8 17%	13 28%	21 45%	5 11%

5. I meet face-to-face with my virtual team members:

At least once per month	9	17%
Once every 3-6 months	24	46%
Once per year	16	31%
Less than once per year	3	6%
I have never had a face-to-face meeting	0	0%
Total	52	100%

6. My virtual team has participated in this number of structured team building sessions (this does not include get-togethers such as dinner, bowling, laser tag, etc.):

5 or more	0	0%
2-5	11	21%
1	17	33%
My team has never participated in a structured team building session	24	46%

Total	52	100%
7. My feelings about the level of challenge associated with effectively leading a virtual team, compared to leading a conventional, co-located team can be best described as:		
It is much more challenging to lead a virtual team	15	29%
It is somewhat more challenging to lead a virtual team	23	44%
It is equally challenging to lead a virtual team and a conventional team	13	25%
It is somewhat more challenging to lead a conventional team	0	0%
It is much more challenging to lead a conventional team	1	2%
Total	52	100%

8. I believe I receive this level of performance from my virtual team:		
Very high	10	19%
High	31	60%
Average	11	21%
Low	0	0%
Very low	0	0%
Total	52	100%

9. Enhancing the performance of my virtual team is:		
Critical	28	54%
Somewhat critical	21	40%
Not critical	3	6%
Total	52	100%

10. I have access to, and know how to use, these forms of technology to help me to facilitate better communication within my virtual team:

One-on-one telephone conversations	52	100%
Conference calls	51	98%
E-mail	52	100%
Internet forums	24	46%
Web sites	27	51%
Communities of Practice	49	94%
Videoconferencing	21	40%
Other, Please Specify :	19	36%
<ul style="list-style-type: none"> ▪ Centra meetings ▪ Virtual Classroom and Instant Message works great! ▪ The Meeting Place, Net Meeting ▪ Net meeting ▪ Mtg place & skip levels on line and via con ▪ Instant messenger ▪ Net meetings - Centra ▪ Net meeting ▪ Virtual meeting collaboration - Centra ▪ Centra & Net Meeting ▪ NetMeetings, IM, Centrix ▪ Surveys ▪ Meeting Place w/VOIP and Video confrencing ▪ Meeting Place, Netmeeting ▪ Netmeeting, (Centra) ▪ Instant Messaging ▪ Net Meetings ▪ Net meeting 		

11. The most frequent mode of communication I use with my virtual team on a daily basis is:		
One-on-one telephone conversations	9	17%
Conference calls	4	8%
E-mail	38	73%
Internet forums	0	0%
Web sites	0	0%
Communities of Practice	0	0%
Videoconferencing	0	0%
Other, Please Specify (1 response)	1	2%
Combination of 1:1 phone conversations and e-mail		
Total	52	100%

12. I believe the amount of communication I share with my virtual team is:		
Excellent	6	12%
Above average	25	49%
Sufficient	15	29%
Lacking	4	8%
In need of improvement	1	2%
Total	51	100%

13. I believe the amount of communication I receive from my virtual team is:		
Excellent	3	6%
Above average	20	38%
Sufficient	24	46%
Lacking	5	10%
In need of improvement	0	0%
Total	52	100%

14. Because I am not always on-site with my team members, my primary concern is that they might:

Take on too much responsibility	10	19%
Bend or break rules	3	5%
Come in late/leave early	7	13%
Have too much to handle	7	13%
Over-promise	5	9%
Think that deadlines are less important	6	11%
Other, Please Specify:	28	53%
I do not have any of these concerns or any others.		
Lack focus on what is truly important.		
Lack latest information		
I really have no concerns		
Feel disconnected to the business/goals, etc.		
Feel less valued than on-site employees		
Need assistance that I'm not aware of		
Team building and best practice sharing		
like to see me meet face 2 face with the customer		
Disrupt work/life balance		
None		
Not enough focus or support		
Change standards for the customers to pacify them		
Think I don't care		
Not Communicate Concerns Early/Readily		
Have low morale that I can't detect virtually		
Culture, lose sense of team and efficiency related		

Not keep me posted of project progress
Feel detached and less a part of a group
That they may not come to me when they need me.
Feel they aren't as important as co-located member
Miss out on '[headquarters] only' events, face-face time
Not feel like part of the team
Take on too little responsibility
Lack clarity, take on too much/little
Have too little to do
Take shortcuts
Not be aligned on priorities

15. I have been provided with the tools and techniques I need in order to effectively manage virtual team members who require corrective action

Strongly agree	6	12%
Agree	23	45%
Disagree	21	41%
Strongly disagree	1	2%
Total	51	100%

16. In terms of both interpersonal and professional topics, I feel my virtual team usually communicates (select all that apply):

Very freely and openly regardless of topic	20	38%
Very freely and openly regarding professional (business related) topics	25	48%
Somewhat guarded regarding interpersonal topics	17	32%
Somewhat guarded regarding professional (business related) topics	5	9%
Somewhat guarded regardless of topic	8	15%
Very guarded regardless of topic	0	0%

17. The way my virtual team usually handles conflict can be best described as:		
Conflict is discussed openly, honestly and resolution is easily achieved	18	35%
Most conflict results in some form of compromise	26	51%
Competition ensues and emotion often escalates	1	2%
Conflict is ignored and resolution is not reached	5	10%
Some team members always seem to give in to other's ideas	1	2%
Total	51	100%

18. My level of task-based trust with my virtual team can be best described by the following statement:		
When tasks are delegated, I am confident that the project will be completed accurately, effectively and on time	28	55%
I am only confident that certain team members will complete projects accurately, effectively and on time	22	43%
I know that most projects will need corrections and I consistently have to remind team members about deadlines	1	2%
I might as well do the work myself, as my team won't get it done	0	0%
Total	51	100%

19. My perception of my virtual team's level of task-based trust among themselves is best described by the following statement:		
They all trust one another to get the job done	24	46%
Some of them trust certain team members but not all team members	27	52%
There are significant reservations among team members regarding each other's ability/desire/willingness to get the job done	1	2%
No one trusts that anyone will get the job done	0	0%

Total	52	100%
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20. My level of interpersonal trust with my virtual team members can be best described by the following statement:

My team members would not hesitate to call me if they were concerned about an interpersonal issue	36	71%
My team members would call me, but only after discussing it with a third party to get confirmation that it would be OK for them to call me	7	14%
My team members would try to resolve their issue with a third party and only call me if the situation really required them to do so	8	16%
My team members would not ever call me with an interpersonal issue	0	0%
Total	51	100%

21. My perception of my virtual team's level of interpersonal trust among themselves is best described by the following statement:

All of my team members would feel comfortable calling any of the other members of the team with an interpersonal issue	12	23%
Most of my team members would feel comfortable calling other team members with an interpersonal issue	34	65%
Very few of my team members would feel comfortable calling other team members with an interpersonal issue	6	12%
None of my team members would feel comfortable calling other team	0	0%
Total	52	100%

22. I believe there are cultural (geographical, interpersonal, organizational differences, or other) issues within my virtual team that makes it difficult for all team members to work together:

Strongly agree	4	8%
Somewhat agree	17	33%
I've never thought about it	1	2%
Somewhat disagree	22	43%

Strongly disagree	7	14%
Total	51	100%

23. I have specific strategies and methods for navigating cultural differences within my virtual team:

Strongly agree	9	18%
Somewhat agree	27	55%
Somewhat disagree	10	20%
Strongly disagree	3	6%
Total	49	100%

24. I believe I receive all of the support and/or tools necessary for me to effectively lead my virtual team to high performance:

Strongly agree	9	17%
Somewhat agree	21	40%
Not sure	9	17%
Somewhat disagree	11	21%
Strongly disagree	2	4%
Total	52	100%

25. I am confident that I am an effective virtual team leader:

Strongly agree	11	22%
Agree	30	59%
Not sure	7	14%
Disagree	1	2%
Strongly disagree	2	4%
Total	51	100%

26. Please provide any additional comments (insights or challenges) you might have about effectively leading a virtual team:

The key is to find employees up front who can handle the freedom of working virtually. This is done in both the recruiting, interview and background check process. Also, it's also important to give clear direction on what needs to be accomplished, and be accessible to your team when needed. If you find that your employees are not getting things accomplished, then look at yourself first to change what you are doing. On another note, one tool that I've found to be very effective is instant messaging. With that, you can tell if someone is online or available right away. It's the virtual equivalent of tapping someone on the shoulder.

This is a topic that really does need to be explored and talked about more. There are different challenges with leading virtually; I'm glad to be a part of this survey.

I really think as managers we need more direction, resources, and training on leading and motivating virtual teams.

I don't believe remote program managers are as effective as those that are based in [headquarters]. Program management requires relationships. Establishing these remotely is difficult. All the project management books I've read indicate that some positions are "better" suited for working remotely. Trainers and developers come to mind. Remote program management is extremely difficult. When compounded by new teams, new processes, and inexperience, it becomes most difficult to manage and coach. Building the skill set of my remote members is my primary concern.

Due to budget constraints the number of team meeting has become non existent. In order to manage a remote team well you need to touch base in person at least one time per year. The other issue for remote teams is the lack of information for a new manager on how to effectively manages a team of people remotely. There needs to be a list of tools that the company supplies to a person who is part of a remote team. Examples: webcam (Managers can then have one on one meetings looking at the person), ability to complete a two way web cam conversation (Currently webcam is only able to happen one way): Video conferencing: (ability for a remote employee to take part in meeting via web conferencing.)

IM (instant messenger) is a great way to have informal virtual conversations. I would highly encourage managers of remote teams to have these tool open and available at all times. It allows for instant communication.

My biggest challenge is budgetary. I do not have travel dollars to bring my team together or to even travel to see them more often. In terms of cultural, it is mostly issues that you would expect during merger. Both legacy companies have difference processes, terminology etc... We have had no personal issues and I try to be very careful not to make assumptions and I believe my team members try as well.

This topic is a wide open opportunity for an entrepreneurial person to start a consulting business

to address.
Current budget issues are making it challenging to lead virtual teams.
A virtual team is not a problem
We continue to make progress as a virtual team. I've received feedback especially regarding communication and the difficulty to be part of a team meeting on a conference call, which I've worked to resolve.
With leading a team from the other legacy company, communication and tools are quite different. There have been challenges because many people feel that they are being pushed to the way the 'other legacy company' use to do things. It's my goal for everyone to understand that changes and directions are changing for to have complete unity within the new company...not to stay with my legacy lines. This has been a challenge with concerns to the survey above.
At this time, I have legacy [company] employees on my team who are located at [headquarters]. Since I am a [opposite] legacy [company] manager, I find it difficult to understand the previous legacy [company] culture and work to mediate both cultures to all employees. Also, I would hope videoconferencing would be more readily available to virtual teams. It's important as people meet they not only able to hear each other but are able to see each other. Videoconferencing would allow both audio and visual communication to occur.
As with any organization, there may be a "lowest common denominator" person who challenges the teams' success. However, "Virtual Teams" are much less impacted by this type of personality and achieve higher quality and quantity of work. The "politics" lessen with "Virtual Teams"
With travel dollars being cut from budget managing a virtual team is going to become tough as you do need the occasional face to face
Do not micro-manage, and do not lose track
Biggest challenge is legacy [company] "vs." [legacy company]. The integration of employees has been too much, too fast with no room or accommodation of feelings and issues.
1) Due to budget constraints I am not able to travel on a regular basis to meet with my team members. I do have concerns that this could cause problems with trust and other interpersonal issues. 2) I did not answer #17 because this has not yet applied to my team. Each team member works on their own projects and does not have to rely on others on the team. We are a new team and have not yet experienced any conflict. 3) I think the only cultural difference we have experienced is Legacy [company] vs. Legacy [company]. Each side is hesitant to show weakness, admit that they don't understand something, or just completely let down their guard in general. This will come with time.
Since my virtual team members are new to me (result of the merger), my biggest challenge is knowing what they can and cannot do. I would like to meet face-to-face with my virtual team members at least once a month, but; the budget doesn't allow. I have 1x1 phone calls once every 2 weeks, but; I don't feel this is sufficient. Again, this is not good when the people are

brand new to me.

Key begins with establishing personal relationships with team members. Can be accomplished via 1:1 calls, personal visits, team builders but must be in place to ensure relationship is built.

Very challenging to do effectively

APPENDIX C

PowerPoint Presentation Slides

Slide One

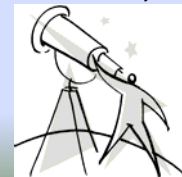


Effectively Managing a Virtual Workforce

Slide Two

Course Outcome

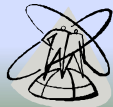
The outcome of this course is to address some of the most common challenges you will face as the leader of a virtual team and provide some proven tools and techniques to help you lead those teams to an increase in performance and effectiveness which will ultimately impact and improve business results.



Slide Three

Course Objectives

- Identify some common challenges and frustrations associated with the virtual teaming and virtual leadership processes.
- Accurately define a virtual team as well as effectively differentiate between virtual and conventional teams, and between work teams and work groups.
- Assess your current capabilities as an effective virtual leader by completing a virtual leadership readiness self-assessment.
- List and describe the four fundamental categories of challenge most commonly related to virtual leadership.
- Implement a number of appropriate tools and techniques that will increase effectiveness as a virtual leader and aid



Slide Four

A Working Definition

A virtual team is a group of people who are geographically, culturally, and/or functionally diverse, who rely primarily or exclusively on electronic forms of communication in order to work interdependently and collaboratively in an effort to reach a common set of goals.



Slide Five

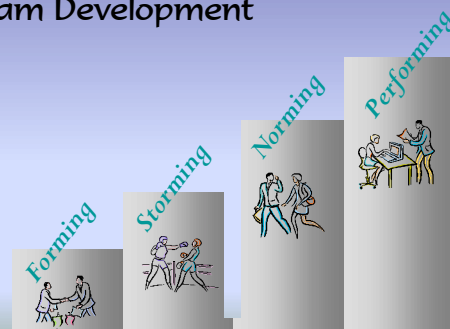
A Working Definition

A virtual team is a group of people who are geographically, culturally, and/or functionally diverse, who rely primarily or exclusively on electronic forms of communication in order to work interdependently and collaboratively in an effort to reach a common set of goals.



Slide Six

The Four Stages of Team Development



Slide Seven

Forming

- High dependence on leader for guidance and direction.
- Little agreement on team aims other than received from leader.
- Individual roles and responsibilities are unclear.
- Leader must be prepared to answer lots of questions about the team's purpose, objectives and external relationships.
- Processes are often ignored.
- Members test tolerance of system and leader.



Slide Eight

Storming

- Decisions don't come easily within group.
- Team members vie for position as they attempt to establish themselves in relation to other team members and the leader, who might receive challenges from team members.
- Clarity of purpose increases but plenty of uncertainties persist.
- Cliques form and there may be power struggles.
- Need for focus on goals to avoid becoming distracted by relationships and emotional issues.
- Compromise may be required to enable progress.



Slide Nine

Norming

- Agreement and consensus is formed among team.
- Roles and responsibilities are clear and accepted.
- Big decisions are made by group agreement.
- Smaller decisions may be delegated to individuals or small teams within group.
- Commitment and unity is strong.
- Engagement in fun and social activities.
- Processes and working style are developed.
- General respect for the leader exists and some leadership is shared by the team.



Slide Ten

Performing

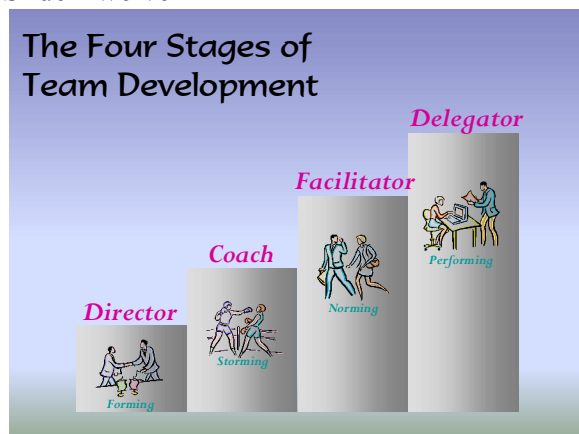
- Strategically aware and knowledge of why it is doing what it is doing.
- Shared vision and able to stand on its own feet with no interference or participation from the leader.
- Focus on over-achieving goals.
- High degree of autonomy.
- Disagreements occur but are resolved within the team positively.
- Necessary changes to processes and structure are made.
- Able to work towards achieving goals.
- Attend to relationship, style and process issues.
- Team members look after each other.



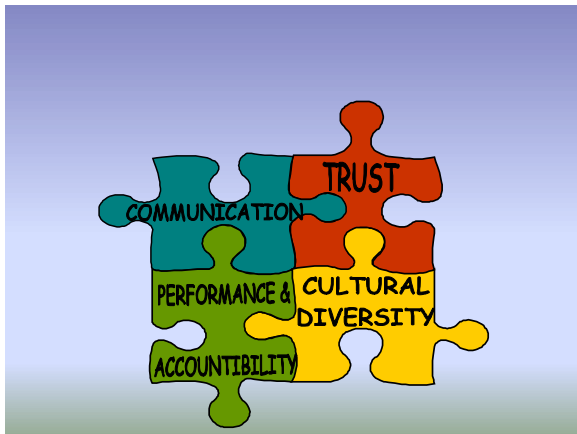
Slide Eleven

<p>Forming</p> <ul style="list-style-type: none"> • Why are we here? • Who are the members? • What do we contribute? • How can we begin to work together? 	<p>Storming</p> <ul style="list-style-type: none"> • How will we resolve disagreements and conflicts? • Who is in charge here? • How will we uncover hidden agendas? • How do I fit into the group?
<p>Norming</p> <ul style="list-style-type: none"> • What's working? • How can we do better? • How can I help? • Where else can we use our strengths? 	<p>Performing</p> <ul style="list-style-type: none"> • What else can we do? • How do we constantly get better? • How can we raise the bar? • How can we celebrate what we have done?

Slide Twelve



Slide Thirteen



Slide Fourteen

T Tolerance – Accept the ideas of others with minimal criticism. If you disagree, keep your critique focused on the idea, not the person.

R Responsibility – Keep commitments and don't make promises you can't keep.

U Understanding – Allow for differences in others. Communicate clearly to ensure that others can understand your ideas. Be open to feedback and give support when needed.

S Sharing of ideas – Be honest in your communication and include others.

T Togetherness – Don't create hidden agendas or cliques within the group. Spend time with other team members whenever possible.

Slide Fifteen

Conditions that create an environment for trust:

- Communication is truly open
- Teams meet face-to-face at least once
- Members feel empowered to make and act on decisions
- Conflicts are managed and not avoided
- The team leader models and reinforces these positive behaviors

Slide Sixteen

Members of trusting teams:

- Admit weaknesses and mistakes
- Ask for help
- Accept questions and input about their areas of responsibility
- Give one another the benefit of the doubt before arriving at a negative conclusion
- Take risks in offering feedback and assistance
- Appreciate and tap into one another's skills and experiences
- Focus time and energy on important issues, not politics
- Offer and accept apologies without hesitation
- Look forward to meeting and other opportunities to work as a group

Slide Seventeen

Effective Communication

Media	Interactions	Relationships
Technology		People
Medium	Process	Patterns
Physical	Observable	Experience
Data	Behavior	Learning
Nervous System	Thinking	Knowledge

Slide Eighteen

Tips for Effective Communication

- Meet face to face as frequently as possible
- Provide clear direction
- Clarify goals
- Establish team norms
- Use the most appropriate technology for the message
- Vary the type of technology used
- Be aware of "upgrading" and "downgrading" communication methods

Slide Nineteen

Communication Infrastructure

Who	Needs to Talk to/ Respond to Whom	About What	For What Purpose	Through What Medium/ Forum	In What Time Frame	How Often	Who Else Needs to Be Informed
	Manager						
	Team						
	Individual Team Members						
	Strategic Partners						
	Customers						
	Support Function						
	Other Teams						
	Other Stakeholder						

Slide Twenty

Five techniques to respect and encourage diverse characteristics and behaviors among virtual team members

Listen – hear and interpret verbal cues

- Resist distractions
- Suspend judgment
- Recall the content
- Reflect upon meaning
- Reflect upon the volume, tone, pace, or writing style
- Paraphrase the content

Question – use thoughtful inquiry to obtain a clear understanding

- Ask direct questions if you want short answers
- Ask open-ended questions if you want to encourage others to respond
- Don't ask leading questions

Demonstrate understanding – express your comprehension of the other person's point of view

- Think it out first
- Paraphrase, don't repeat
- Keep it short
- Use words the other person will understand

Slide Twenty-One


Five techniques to respect and encourage diverse characteristics and behaviors among virtual team members

Give your perspective and disclose who you are - present your view in an honest, straightforward and clear manner

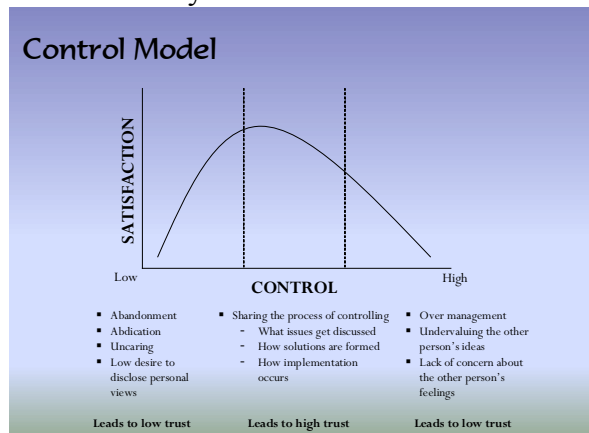
- Organize your viewpoint
- Present your viewpoint

Demonstrate understanding of the reaction to your viewpoint

- Manage conflict – resolve differences in a way that results in a win-win outcome
- Identify values
- Expand alternatives
- Select the best alternative



Slide Twenty-Two



Slide Twenty-Three

- ### Techniques for an environment of high performance and accountability among virtual team members:
- Publicly post team goals and standards
 - Clarify team roles and responsibilities
 - Engage in rotated, shared, or distributed leadership responsibilities
 - Facilitate simple and regular process reviews
 - Align behaviors with rewards and recognitions
 - Encourage and allow the team to serve as the first and primary accountability mechanism

APPENDIX D

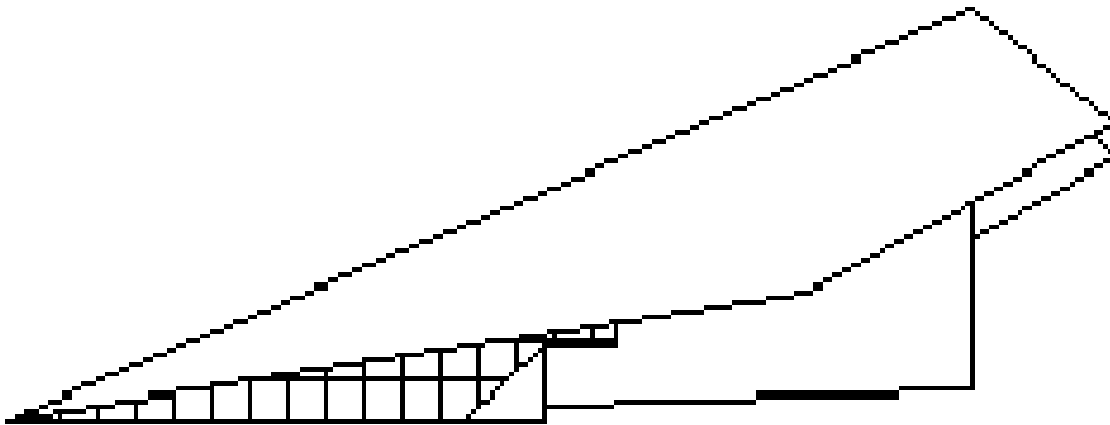
ABC Aerospace Activity Materials

The Dart

Your team has been challenged to build a prototype of ABC Aerospace Corp's innovative new DART Airplane to present to a potential customer that is arriving on-site in the next half hour.

In order to present your sample, your plane must meet the following criteria:

- It must look like the diagram below.
- It must be constructed from **lemon yellow** 8½ x 11 multi-purpose office paper.
- It must be capable of flying a 5 foot distance before falling to the ground.
- It must be completed and ready for customer review in the established timeframe.
- When your team is finished, the team "builder" should take the model to the facilitator.
- Only once your team's prototype is complete, can you return back to the meeting room and wait outside the door until the facilitator



The Dart Airplane

- ✓ Take an 8 1/2 by 11 inch sheet of yellow paper, and crease it along the middle by folding it in half lengthwise.

- ✓ Fold down the top corners inward to the center crease, making two new right-angle triangles.

- ✓ Fold the large top triangle, over and down. It should look like the back of an envelope.

- ✓ Fold the paper in half again along the center fold so that the folded-down point is on the outside.

- ✓ Position the paper in front of you with the crease facing left, and the point of the "envelope" facing down.

- ✓ Tear or cut a notch in the upper right hand corner of the paper and remove the square (about $\frac{1}{2}$ inch). Do not cut your notch along the center fold.

- ✓ Unfold the paper again so that the envelope point is facing down and pointed toward the bottom of the page. The notched corners will be on both the right and left hand upper corners at the top of the page.

- ✓ Fold down the top left corner so that the top edge of the left half of the page is aligned with the center fold.

- ✓ Fold down the top right corner so that the top edge of the right half of the page is aligned with the center fold.

- ✓ You should have the notched portion of the paper forming a square at the center of the airplane.

- ✓ Fold the exposed tip of the "envelope" point up so that it covers the edges of the two flaps. This will hold those flaps in the proper position during flight.

- ✓ Fold the paper back along the center fold so the flaps and point are exposed on the outside.

- ✓ Position the plane flat on the table in front of you with the point facing up and the center crease facing left. The top flap of the paper should form a triangle.

- ✓ Fold down the top triangle in half, so that the angled portion of the triangle is aligned with the original center crease. * This fold should begin at the tip and run the length of the airplane, creating a wing.

- ✓ Flip the plane over; create the other wing by mirroring the previous step.

APPENDIX E

Forming

- ◆ Why are we here?
- ◆ Who are the members?
- ◆ What do we contribute?
- ◆ How can we begin to work together?

Storming

- ◆ How will we resolve disagreements and conflicts?
- ◆ Who is in charge here?
- ◆ How will we uncover hidden agendas?
- ◆ How do I fit into the group?

Norming

- ◆ What's working?
- ◆ How can we do better?
- ◆ How can I help?
- ◆ Where else can we use our

Performing

- ◆ What else can we do?
- ◆ How do we constantly get better?
- ◆ How can we raise the bar?
- ◆ How can we celebrate what we have done?

APPENDIX F

Building Trust Activity

Activity One – Human Bingo

The object of the game is to get BINGO (across, down, diagonal) by mingling with the other members of the group and writing their initials next to a square that applies to him or her. Once you have 5 squares in a row with initials filled in, yell out BINGO!

B	I	N	G	O
drinks diet soda	has the same favorite color as you	has a car	speaks more than 1 language	loves math
has a pet	has met someone famous	reads the newspaper regularly	is married	doesn't have a driver's license
was born in the same month as you	has traveled to 3 or more countries	FREE	is wearing red	has children
exercises at least 3 times a week	has a creative hobby	loves cooking	has Internet access at home	is wearing contact lenses
has 2 or more e-mail addresses	Has read 2 books within the last year	has two or more siblings	can play a musical instrument	does volunteer work

Activity Two – Reverse Brainstorming

The object of the activity is to establish ground rules for team by asking the members of the group to explain their "most ineffective team experience". The team should shout out, in brainstorming fashion, the things that made a team ineffective. Ideas might include things like: no one ever listened to each other, everyone was always late for meetings, etc.

The ideas should be captured on a flip chart as they are shared. Once all ideas are captured, the facilitator should then reverse the thoughts to create ground rules. For example: everyone was always late becomes we will be on time for all meetings.

If necessary, the new rules can be combined, refined, or clarified before producing the final draft.

Activity Three – Two Truths and a Lie

The object of the activity is to disclose semi-personal information to the other members of the group in order to get to know each other better.

Each member of the group should think about two little known and/or interesting facts about themselves and then one thing that is not true. For example, "I speak fluent French", "I have been skydiving", and "I have never left the state of Colorado."

Each member of the team should then present the three things to the rest of the group. The group will then try to decide which one they think is the false statement.

Activity Four – Decades

The object of the activity is to recognize the different perspectives of the team by disclosing information about their backgrounds. The activity can be done on an individual basis, which works well for small groups, or in teams that are determined by the decade in which the members graduated from high school. For example, a 70's group, an 80's group, a 90's group, etc.

Each member should complete the following statements based on the timeframe during which they were in high school:

- _____ were the coolest fashion trends.
- I listened to _____ kind of music.
- On Saturday nights you could find me _____.
- I could not live without _____.
- My hair was cut/styled _____.
- _____ was "the thing" to do.
- My favorite TV show was _____.

Activity Five – Preference Sheets

The object of the activity is to get to know the group member's style preferences. Each person should answer the following questions and then share them with the other members of the group.

- What are your strengths?
- How do you gain satisfaction at work?
- What are your pet peeves at work?
- What do you need to produce your best work?
- What are your opportunities for development and what support do you need?
- What energizes you and what drains you?
- How do you like to approach a problem and make decisions?
- How do you like to be rewarded and recognized by others?
- What do you think are the most important contributions someone can make to cultivating team work
- How do you like to have fun?

Activity Six – Team Mission/Vision

The object of the activity is to create a shared vision, commitment and buy-in from the group members.

Have the group work together to create a team vision and team mission statement.

Activity Seven

The object of the activity is to learn the Organization's vision, goals and/or mission statement. For this activity, the group must not have prior knowledge of the vision, goals and/or mission statement.

Write the vision, goals and/or mission statement on large paper, cut each word out, individually, and give all of the pieces to the group. They must then work together to create what they believe is the most appropriate vision, goals and/or mission statement from the words they have in front of them.

Check their work against the Organization's vision, goals and/or mission statement to see how close they got to the original

Activity Seven – Blind Polygon

Place a rope on the ground nearby. Assemble the team at least 15 feet away from it. Pay no attention to the rope to make sure that our team does not draw attention to it. If necessary, move the rope after the team is blindfolded.

Have everyone gather close to you and have them blindfold one another. Explain to the group that somewhere near them is a rope. Their challenge is to find the rope and make a polygon with it. During the activity, everyone must remain in contact with the rope, with both hands at all times. Once they touch the rope, they cannot let it go, although they can let the rope slide through their hands. Once the team has come to consensus that they have formed a polygon, they may place the rope on the ground, take off their blindfolds and admire their work.

Activity Eight – Moonwalk

The object of the activity is to develop trust, team work, and effective communication skills.

Place approximately 15 hula hoops on the ground, forming an obstacle course. Tell the participants that they must cross from one side of the hoops to the other. They can only step, however, in the space inside the hoops. If they step outside of the hoop, the whole team must start over. During the time of the activity, the participants must be rubber-banded together at the ankle.

Activity Nine – The Web

The object of the activity is to develop trust, team work, leadership capabilities, and effective communication skills.

Create a giant spider web by stinging rope between two large trees. Tell the group that they must get their entire team from one side of the web to the other by passing through the web. They cannot touch any of the rope throughout the entire process. If they touch the rope at any time, the whole team must start over.

Activity Ten – Sherpa Walk

The object of the activity is to develop trust and effective communication skills.

Have the group divide into pairs. Explain that one of the team members will be blindfolded, and the other will lead him/her around an obstacle course. During the activity, the blindfold must remain on and the only direction the team member will receive is through the effective communication of the other team member.

Have the participants switch roles so that they both experience both sides of the activity.

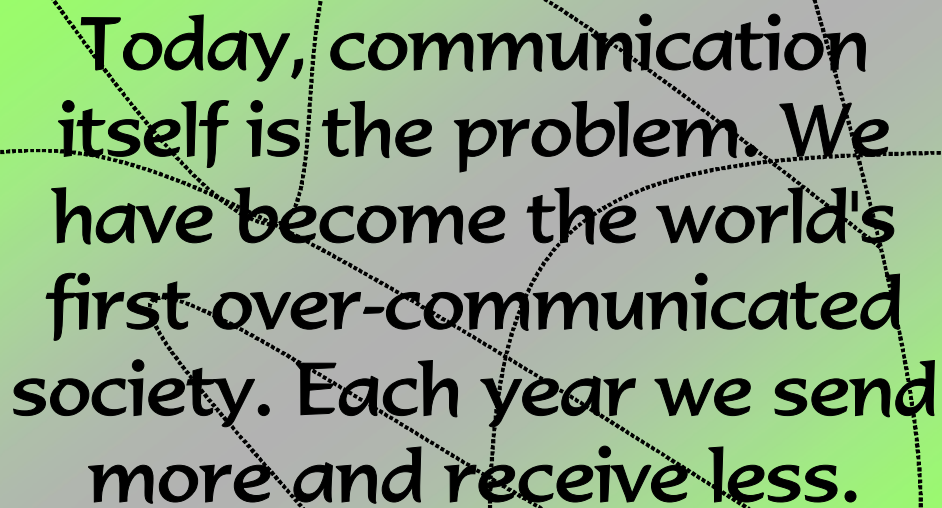
APPENDIX G

Communication Puzzle Activity



The more elaborate
our means of
communication,
the less we
communicate.

~ Joseph Priestly



Today, communication
itself is the problem. We
have become the world's
first over-communicated
society. Each year we send
more and receive less.

~ Al Reis

It seems rather
incongruous that
in a society of super-
sophisticated
communication, we
often suffer from a
shortage of listeners.

~ Erma Bombeck

To effectively communicate,
we must realize that we are
all different in the way we
perceive the world and use
this understanding as a
guide to our communication
with others.

~ Anthony Robbins