

Working with VIRTUAL TEAMS



Working with Virtual Teams: Session Two

Engaging Virtual Teams through On-line Processes

Rachel Welborn
Daniel Kahl
Julie Robinson
Sam Boyster
Neal Vines

Forming and Norming the Team:

Face-to-face meetings allow full communication including team member's words, silence or noises, and body language. These are all ways that a team leader can interpret receptivity to ideas and draw out feedback or new ideas from team members. The absence of visual cues and the potential for muted audio can leave a team coordinator swimming in the dark. This document provides ideas for bridging the virtual divide in order to strengthen communication and effectiveness of working with virtual teams.

Prior to Meeting:

- **Plan ahead** as virtual meetings require more preparation than a face-to-face meeting
- **Establish a regular meeting schedule** (send calendar/appointment invitations)
- **Prepare an agenda and related support materials early and distribute in advance** of the meeting. Include: items, responsibilities, timeframe, purpose, expected outcome/decisions, and estimated time during the meeting for the discussion.
- **Ask team members to provide written status reports prior to the meeting** for team members to pre-read before the call. Include finished actions, upcoming activities, any challenges, and any needed assistance/resources for the next steps. Limit verbal report to discussing any needed assistance or resources necessary for next steps.
- **Connect to technology early and test.** Have a back-up plan.

Starting the Meeting:

- **Have everyone speak at the start of the meeting** to ensure everyone's technology is working and to set the expectation for participation.
- **Use people's names frequently.** If someone signs on and their name is not displayed, provide visual cues for people to know who is on. For instance, in Zoom, you can change a phone number to a person's name. Chat boxes can also help to identify people.
- **Set the expectations that the team members use their cameras** whenever possible. These should be aimed at the person's face. Explain the importance of body language as cues in virtual meetings just as it is for face-to-face meetings. This also helps limit multi-tasking.
- **Build time into the agenda to foster social capital**, especially for new teams. Consider using introductory prompts to facilitate these conversations, such as:
 - A rewarding project for me is one that...
 - The best attribute I bring to this team is...

Working with VIRTUAL TEAMS



- I am most motivated and engaged when...
- Something going on around me today is...
- **Provide a quick orientation to the meeting's technology** format including chat, mute, and other participatory features.
- **Establish ground rules** which might include:
 - Limiting personal distractions including phone and email
 - Avoid interruptions such as by posting a note on your door indicating you are in a meeting.
 - Participating fully
 - Balancing participation – giving space for quieter participants
 - Using a camera – aimed correctly

During the Meeting:

- **Provide aids to keep people on track** with the discussion:
 - Share a screen shot of the agenda.
 - Check to ensure everyone has all the required materials
 - Reference document names and page numbers, etc. often.
 - Be explicit when changing agenda items.
- **Speak clearly**, more slowly and use a microphone.
- **Record meeting** unless sensitive information prohibits or would deter participation.
 - Ask someone to take notes or minutes of the meeting
 - Let participants know the meeting is being recorded
- **Check in with team members regularly** during the meeting.
- **Use a touch-pad matrix** to monitor participation.
- **Organize communication, so that everyone can be heard.**
 - **Call on people one at a time** when you need to hear from everyone.
 - **Use stacking** when multiple participants want to respond. The facilitator can say “several of you spoke up at once – I think I heard Karen first, and then John, then Sarah. Did I miss anyone?”
 - Create space for someone who has not had a chance to speak up. The meeting facilitator might ask: “What do others think? Mark, you have been silent. What is your read on this?”
- **Allow for silence.** In a virtual setting, people often need more time to think and respond. Use the “10 Second Rule”: Ask a question, then silently count 10 seconds before speaking again. If no one has spoken up by that time, restate your question and wait again.
- **Establish decision making processes:**
 - Parliamentary procedure online. You might use the raised hand feature in your meeting platform to be certain that everyone who wants to speak is included. Listen to each team member. Repeat key points (as appropriate) and ask if the team is ready to vote.

Working with VIRTUAL TEAMS



- Email vote: If a delayed vote is acceptable, an email vote is an option.
- Round robin vote: In small groups, you can go around the team and ask for a verbal vote.
- Online polling within the meeting space or using a separate polling tool.

Meeting Wrap-Up:

- **At the close of the session**
 - Summarize key points
 - Recap decisions made
 - Identify action items
 - Check for agreement
- **Provide a process check-in** at the close of the session: How did this meeting go? What would make it better?
- **Record and post an Action Plan** that includes what, when, and who of each step. This tool becomes both a reminder and an accountability record for the team. It also helps ensure important steps aren't dropped along the way. Each meeting should include a review and updating of the tool, adding completed dates, new tasks, etc.

Action	Lead Person	Others Assisting	Deadline	Completion
Find the RFP and distribute to the team	Bob	Susan, Tom	January 18	
Draft the literature review	Angela	Ed, Susan	January 30	
Draft a summary of steps completed to date	Tom	Alex, Jane	January 30	
Set up a shared folder in Dropbox	Bob		January 18	

Immediately After the Meeting:

- **Copy the chat** before ending the meeting and save it as a document
- **Send out minutes** as soon as possible – within 48 hours. Include responsibilities/tasks/deadlines, decisions made, action steps
- **Send out the recordings.** Consider content, edit out extra time where possible
- **Set up prompts to follow up on action steps** as needed—talk about how to do this, why it is important

Communicating between meetings:

- Celebrate successes – look for creative ways to celebrate together - BYO Cupcakes; open a gift together

Working with VIRTUAL TEAMS



- Maintain a shared plan of action chart. Address where to house, who updates, etc.
- Check in regularly with individuals and work teams on progress.
- Select the best tool for the purpose of the communication. The chart below provides some guidelines:

Tool	When To Use
Phone	<ul style="list-style-type: none"> ● Quick sync-ups or situations where you need an immediate answer. ● Times when you need a more personal connection ● When you need to solve a more complex question
Email	<ul style="list-style-type: none"> ● Communications that don't need a fast response ● Messages that need to be recorded
Group Project Management Platforms	<ul style="list-style-type: none"> ● Post announcements to the whole group ● Pose questions/processes that need the entire team's collaboration ● Information that needs to be recorded. <p>Examples: Basecamp, Microsoft Teams, Chatter,</p>
Instant messaging/texting	<ul style="list-style-type: none"> ● Messages that need a quick answer, but don't need to be recorded. <p>Examples: Skype messaging, Slack, Google Chat, cell phone texting</p>
Web conference	<ul style="list-style-type: none"> ● Scheduled team meetings ● 1 on 1 or small group check-ins ● Meetings you need to record ● Times when seeing body language is important such as problem solving, decision-making, or conflict resolution. <p>Examples: Zoom, Skype, Adobe Connect, GoToMeeting</p>

Chart adapted from Virtual Collaboration – Develop Your Virtual Strategy

https://trailhead.salesforce.com/en/modules/manage_the_sfdc_way_virtual_collaboration/units/msfw_virtual_collab_develop_your_strategy