The 2007 Linkage Excellence in Management & Leadership Series

Leading High Performance Virtual Teams

Participant Guide

Featuring Mareen and Kimball Fisher, authors of The Distance Manager: A Hands-On Guide to Managing Off-Site Employees and Virtual Teams

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Dear Participant:

Welcome to the Linkage broadcast, *Leading High Performance Virtual Teams*. This is the seventh of eight broadcasts in Linkage’s 2007 *Excellence in Management & Leadership Series*. It features Mareen and Kimball Fisher, team-building and leadership experts, co-founders of The Fisher Group and authors of *The Distance Manager: A Hands-On Guide to Managing Off-Site Employees and Virtual Teams*.

In this 90-minute program, the Fishers will share with you management skills that virtual teams have executed to become more productive and effective. Throughout the presentation, Kimball and Mareen Fisher will draw on their extensive experience researching and writing about virtual team management and putting their theories to work for some of the biggest names in business including Apple, AT&T, Capital One, Ford, IBM, Intel, NBC, Nike, Toyota, and many others.

During this presentation you will learn:

- The six types of virtual teams.
- How to determine which type of team you have.
- How to best select team members and management methods for teams.
- How to build trust and manage performance virtually.

These participant materials have been designed to complement your participation in this broadcast with Mareen and Kimball Fisher. Use the materials *before* the broadcast to learn more about the Fishers’ tips for effectively managing virtual teams.

Kimball and Mareen Fisher will present for 60 minutes. Use the materials *during* the broadcast to record your notes, ideas, questions, and insights. After a five minute break, the Fishers will respond to your questions for the remaining 25 minutes; throughout the broadcast, you can submit questions directly to the presenter via fax, telephone, and/or email. Your submission of questions is critical to the success of this program.

Most importantly, use the materials *after* the broadcast to help you implement the principles and techniques as you lead your organization. Use the materials as an ongoing source of renewal, energy, and direction.
About Linkage

Linkage, Inc. is a global organizational development company that specializes in leadership development. Serving the public and private sectors, the company provides clients around the globe with integrated solutions that include strategic consulting services, customized onsite training experiences, tailored assessment services, and benchmark research.

With a relentless commitment to learning, Linkage also offers a full range of conferences, institutes, summits, public workshops, and distance learning programs on leading-edge topics in leadership, management, HR, and OD. More than 100,000 leaders and managers have attended a Linkage program since the company’s founding in 1988.

Linkage is headquartered in Burlington, Massachusetts, with regional offices in New York, Detroit, Minneapolis, Atlanta, San Francisco, Brussels, Bucharest, Johannesburg, London, Seoul, Singapore and Tokyo. On two occasions, Linkage has been named to the Inc. 500, a list of the fastest-growing private companies in the United States.

Upcoming Events

Linkage’s broadcasts represent the best in leadership and management thinking, providing you with:

- Idea-generating programs by world-renowned and inspirational leaders.
- A convenient, on-site option for educating your leaders and managers.
- An innovative vehicle to deliver and drive the learning.

Please join us for this upcoming program. This broadcast is offered live, by Linkage, on the following date and time. Please check with the individual responsible for the broadcasts within your organization for any internal changes to the schedule.

- November 28, 2007 11:00am-12:30 pm Eastern Time
  Leading Change
  with John Kotter, author of Our Iceberg is Melting

As the pace of change continues to accelerate, successful companies will need leaders from all levels to react to and steer the organization through the bevy of challenges it will face. Companies will be affected by such factors as technological changes, globalization, mergers and acquisitions, and the need to transform a corporate culture. Professor Kotter will share his insights from 20 years of research and real world experience on leading change. In his latest release, Our Iceberg is Melting, John Kotter combines this research with the power of a fable to produce a work that can be a valuable tool for those at all levels.
Did you miss the live broadcasts of the previous speakers featured in Linkage’s 2006 and 2007 Excellence in Management & Leadership program? Don’t worry; these experts are available On-Demand:

- Marshall Goldsmith on Coaching for Leadership
- Warren Bennis on The Most Common (and Often Fatal) Failures of Top Leadership
- Marcus Buckingham – Leverage Your Strengths
- Michael Useem on Reaching the Go Point
- Patrick Lencioni on Building and Leading a High Performance Team
- Clayton Christensen on Building a Successful Innovation-Driven Organization
- David Breashears on Vision, Courage and Passion: Leadership at 26,000 Feet
- Tom Davenport on Maximizing Knowledge Worker Productivity; The Next Generation of Management
- Tony Schwartz on Building Individual and Organizational Capacity in the Age of Overload

Check Linkage’s website (http://www.linkageinc.com) for additional programming, details, and dates.
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SECTION 1

PROGRAM MATERIALS
Introduction and Basic Premise

“We have 17,000 people dispersed in 2000 locations—none of which we own—in 43 states, serving 35,000 patients a day. And the question is, what are they all doing? Especially since each one could put me in jail each day…We’ve found that after developing the technology to connect and communicate [to] dispersed personnel, the challenge is to develop the operating culture that allows for its utilization. Our culture is the only thing—except for our name—that connects all of these people in all of the units.”

- John H. Foster, Chairman, NovaCare

As the world becomes increasingly smaller with technology allowing a person in China to routinely contact a person in Mexico, and as companies grow larger and expand globally, people will often find themselves working directly on a project with someone, or many employees, who is not located in the same office building as the rest of the team. Sometimes these virtual teams are created for one specific project and have a set deadline, and other times the virtual team must work together over distance indefinitely. Regardless of the lifespan of the team, virtual team managers must somehow cross the boundaries of space, time and culture to establish a cohesive, functioning and successful team.

The first step to fostering a team across distance is to identify which kind of virtual team exists. The Fishers define a virtual team as a groups of employees who must function as a cohesive team, yet aren’t able to routinely meet face-to-face to work together on projects. In today’s business world, many employees are forced to work on virtual teams because of the following reasons:

- Business units located across the country and/or around the world.
- Workers in various time zones.
- Employees that are frequently away from the office on business.
- Part-time employees who aren’t able to be with the team as often as other members.

Leveraging Technology to Foster Team Building

The Fishers believe that technology can greatly improve communication and functionality within virtual teams, if used correctly. By leveraging technology, managers of virtual teams can bridge distance by creating virtual time and virtual space.

To create virtual time, Kimball and Mareen Fisher advocate using asynchronous communication methods, including voice mails and emails, as well as synchronous meetings, like Web conferences, conference calls and shift overlaps when possible. Virtual space can be established by having team members use the same Web pages, Intranets and virtual offices. Both virtual time and virtual space help virtual team members establish relationships and trust with coworkers who they don’t necessarily see on a regular basis.
Creating a Trusting Environment

One of the biggest challenges that virtual teams encounter is creating a trusting environment for employees and so the Fishers created several best practices for managers of virtual teams to consider. The Fishers’ tips for developing trust include being honest with team members, maintaining an open and consistent line of communication, delivering on all promises, holding all team members accountable for their actions, and interacting with colleagues in a predictable manner. Above all, it is critical for team managers to show the group that they trust their abilities and decisions.

In addition to implementing the above trust-building practices, the Fishers strongly recommend holding celebrations for all team members, regardless of distance. To do this, team managers should celebrate any significant milestones that are important to employees, including birthdays, anniversaries, weddings, births of children, and completing educational degrees. A great way to be sure all team members feel like part of the party is to send portable party kits, equipped with party favors, candy, and small gifts, to employees not located at the main office.

While long distance parties are great trust-building activities, Mareen and Kimball Fisher still stress the importance of in-person meetings and celebrations to mark key points throughout the lifetime of the project. In any kind of celebration, team managers must be cognizant of the cultural differences and encourage employees to celebrate in their own fashion.

Operating Guidelines

The Fishers also have many best practices for establishing everyday operating guidelines, which are created and supported by all team members. For best results, operating guidelines should be set while the team is first forming and then be continuously revised as the team’s work progresses. Mareen and Kimball Fisher suggest that every team member has a say in the creation of the guidelines, which should encompass all aspects of the team’s typical work. Common operating guidelines include:

- We will address conflicts directly, with all people involved.
- We will have team update meetings on a weekly basis.
- The team will meet face-to-face on a quarterly basis.
- We will respond to all emails and calls within 24 hours.

For teams that rely heavily on email, voicemail, Web conferences, shared drives, and instant messaging, it is a good idea to also establish protocol for all employees to adhere to in addition to the general operating guidelines.

Managing Performance from a Distance

A big challenge many virtual team managers face is how to accurately assess the performance and development of remotely located team members. Much like teams who consistently work together in person, the Fishers advocate that virtual teams establish clear expectations, set goals, and conduct routine performance assessments. It is important that managers of virtual teams
check-in with remotely located employees as often as they do with employees they see on a daily basis. Some ways of ensuring this happens, according to Mareen and Kimball Fisher, is to set up one-on-one weekly conference calls, in addition to weekly virtual team meetings, as well as occasional face-to-face meetings with all team members. Virtual team members should feel as much a part of the team as employees located in the main office.

Because technology is progressing so rapidly, it is no longer a challenge to frequently communicate with people in different time zones, countries, and continents. Companies are sure to continue to tap into the powerful communication resources available to them, including instant messaging, Web conferences, and email, to build virtual teams. While building a successful virtual team presents many unique challenges, virtual teams allow the best in the industry, regardless of location, to work together to accomplish a task, which can lead to bigger and better results than ever before.
Question-and-Answer Session

The Fishers will devote the last 25 minutes of the live broadcast to answer your questions. Complete the Question Sheet found on the next to last page of this participant guide and:

- If you are participating in the live presentation of this program, fax, e-mail, or call in your questions using the instructions on the Question Sheet. Your program coordinator may collect your questions and send them in collectively.

  Fax 1.877.892.0170 (from within U.S.)
  Fax 646.349.3661 (from outside U.S.)

  Email: leadership2007@linkageinc.com

  Tel 1.800.218.0530 (from within U.S.)
  Tel 303.262.2131 (from outside U.S.)

- If you are participating in a recorded presentation of this program, share your questions with your program coordinator to be used during your post-broadcast activities.

When the Session Has Concluded

- To further reinforce your learning from today’s program, as well as hone other aspects of your leadership skills, complete the recommended post-broadcast activities that begin on page 27 of this participant guide.
**Pre-Broadcast Reading: Leading People Who Don’t Report to You**

This material comes from *The Distance Manager: A Hands-On Guide to Managing Off-Site Employees and Virtual Teams* by Kimball and Mareen Fisher (pp 111-116) and was modified to meet the needs of this broadcast.

**Introduction**

Leading virtual teams, while challenging, is not an uncommon practice today. When Boeing assembled their product development team for the 777 aircraft, the company included representatives from United Airlines, the FAA, engineering, manufacturing, and maintenance. Project leaders, therefore, had team members who did not report to them, or, in some cases, to anyone in Boeing. Just about everybody today works with outside consultants, customers, or vendors on key projects. In the high-tech industry it isn’t even unusual to have competitors working together on the same project.

These situations require that the virtual team leader be able to lead without the traditional authority bestowed on him by virtue of position. How do you manage a virtual team when you don’t have the power of position and hierarchy?

**Tip Number 1. Use persuasion and influence instead of commands.**

Although you can simply issue orders when people report to you, you can’t use this technique when they don’t. And in teams separated by distance, persuasion and influence increase in importance. Factors that negatively impact a person’s ability to persuade or influence include: resorting to the “hard sell”; resisting compromise (“my way or the highway”); being unkind, negative, or impatient; and being overly emotional.

In order to persuade others, one must first establish credibility, a function of competence and relationship. As a distance leader, your credibility depends almost solely on how well and how consistently you coordinate and facilitate.

**Tip Number 2. Use facts and data.**

The most effective kind of power is information power rather than position power. Having facts and data on your side is much more compelling than hierarchical clout.

**Tip Number 3. Respect the expertise of all team members.**

A common phenomenon when crossing department or organization lines is an increased sense of loyalty to one’s own roots. This effect is exacerbated in teams separated by distance and culture. Find ways to involve other people as a way to tap into their expertise and experience.
Leading High Performance Virtual Teams
Kimball and Mareen Fisher

team member voice his or her areas of expertise and experience. Asking for their participation is the highest form of respect.

**Tip Number 4. Establish common ground.**

Virtual teams often need to become productive quickly; identifying common ground – similar goals, interests, backgrounds, etc. – often helps pave the way for more and better communication and helps resolve potential conflict more quickly.

Especially for virtual teams separated by time, distance, or culture, establishing common ground becomes more of a challenge AND more important. While acknowledging differences is important, the less common the team members, the more important it is to establish the common ground. Acknowledge differences, work to find the widest common ground, then stick to the task at hand.

**Tip Number 5. Maintain confidentiality.**

Maintaining confidences is one of the keys to building trust in virtual teams. When leading individuals who don’t report to you and who may represent different organizations, this becomes even more critical. Knowing that proprietary information, all confidential data, and personal concerns or issues will be handled respectfully helps forge stronger, more productive relationships.

Within different corporate cultures – even different groups within the same company – ways of dealing with confidential information may vary dramatically. It’s a good idea to discuss up front what constitutes confidential information and develop protocols for handling such data.

**Tip Number 6. Exercise conscientiousness and integrity.**

If a leader can’t use position power, he or she can still influence through moral authority. Research indicates that leaders who demonstrate the characteristics of both conscientiousness and integrity are far more likely to get good results than those who do not display these characteristics.

Conscientious leaders are high achievers and self-starters who take initiative and have focused objectives. Leaders with integrity are honest and consistent about what they say, do, and feel. They have a clear set of values that they will not compromise.

**Summary**

Leading people who don’t report to you calls for an approach different from the traditional reliance on hierarchical or position power to get things done. And leading those people over a distance – separated by time, space, or culture – requires extra attention to the key skills of influence, respect, use of facts, confidentiality, and integrity.
Pre-Broadcast Activity: Leading Teams, Virtually

Leading virtually teams requires first that you be an effective leader. The challenges of leading a team are exacerbated when separated by time, distance, and/or culture. How are YOUR leadership skills? Take this short inventory to find out.

<table>
<thead>
<tr>
<th>As a Team Leader I:</th>
<th>Need Development</th>
<th>Very Capable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Empower the team by ensuring they have the authority, resources, information, and accountability to be successful.</td>
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<td></td>
</tr>
<tr>
<td>2. Focuses on results.</td>
<td>0 1 2 3 4 5</td>
<td></td>
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<tr>
<td>3. Encourages diversity of membership, thinking, and approach on the team.</td>
<td>0 1 2 3 4 5</td>
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</tr>
<tr>
<td>4. Listens to and acts on other people’s suggestions.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>5. Communicates relevant business information with the team.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>6. Helps the team recognize, understand and resolve different kinds of conflict.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>7. Works actively to remove unnecessary policies, procedures, or work practices that hinder team performance.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>8. Models good team meeting preparation and facilitation.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>9. Makes sure all team members are trained and competent in virtual communication technologies (i.e., e-mail, teleconferencing, Web conferencing, video conferencing, etc.)</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>10. Helps the team establish clear goals and measures of performance.</td>
<td>0 1 2 3 4 5</td>
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</tr>
<tr>
<td>11. Deals effectively with poor performance.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>12. Helps the team understand and use effective decision-making processes.</td>
<td>0 1 2 3 4 5</td>
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</table>

This assessment contains portions of The Fisher Group’s Team Leader Effectiveness Assessment and Virtual Team Effectiveness Assessment.

Distance managers tell us that five things, in particular, can cripple your effectiveness: (1) either autocratic or abdication behavior, (2) poor virtual team start-ups, (3) unclear roles and responsibilities, (4) starving teams of resources, and (5) lack of either social and/or technical infrastructures.

Kimball and Mareen Fisher
The Distance Manager
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During The Program

- Participate!

- Submit questions to be addressed by Kimball and Mareen Fisher during their broadcast. They will speak for the first hour and then, after a short break, respond to questions for the next 25 minutes, so again, your submission of questions is critical to the success of the program. To submit questions, complete the Question Sheet (found on next to last page of this guide), submit an e-mail, or call in when prompted during the program.

- The Fishers ask that you engage in the questions and answers. If you wish, use the following pages to take notes on points important to you during the broadcast.
Notes

Kimball and Mareen Fisher have graciously provided the slides they will use in their presentation. These slides are copyrighted to the Fishers and are not to be used, reproduced, or distributed without written permission from them. Please note that the Fishers may deviate from these slides.

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The extraordinary performer gives full effort regardless of whether the boss is watching. He or she is self-motivated, worries about work issues whether or not he or she is "on-the-clock," and is perpetually trying to improve work processes and relationships.

Kimball and Mareen Fisher
The Distance Manager
p. 91

Coming together is a beginning. Keeping together is progress. Working together is success.

Henry Ford

Objectives

• Build awareness of the challenges facing distance managers.
• Learn skills and techniques for building trust in virtual teams.
• Develop an understanding of various communication technologies and learn about techniques to use them effectively.
• Review managing performance from a distance.

What is a “virtual team”?

• Any group of people who must work together, but have individuals in the group who can’t frequently meet face-to-face, including:
  -- Any person who works in a different location
  -- Any person who works a different time schedule
  -- Any person who is often out of the workplace
  -- Any person who works less than full-time with the group
• Examples:
  -- Team members located in different workplaces
  -- Team members who work in shifts
  -- Team members who travel frequently
  -- Team members who sometimes work from their homes or cars
  -- Team members who are assigned to multiple project teams
  -- Team members who work part-time
  -- Team members who report to more than one manager
Building capability in individuals who are working virtually is one of the most important pieces of coaching a distance manager can do. An effective way to transfer capability is to ask questions instead of giving answers.

Kimball and Mareen Fisher
The Distance Manager
p. 61

More notes

Important Trends

• Technologies allow more effective communication and collaboration than ever before.
• A distributed workforce is the wave of the future (because work can now be done closer to where it needs to be done and traditional jobs are disappearing).
• Cost pressures will continue to increase (and it no longer makes sense to invest a lot of money in office space).

Selected Implications

• Much of our work will be done with people who aren’t in the same location as us or their other team members.
• We have to motivate and coordinate people who normally don’t see us or their team mates face-to-face.
• Critical conversations will be conducted over e-mail, the phone and Web conferences.
• Managers are technologically tethered to work.
• But performance expectations are going to increase.

Questions From Distance Managers

• What is virtual team management?
• What are the major challenges?
• What changes must leaders make?
• How do we help employees feel connected?
• How do we avoid common mistakes?
• How do we communicate effectively?
• How do we maintain relationships?
• How do we motivate virtual team members?
• How do we manage across different cultures?
• How do we measure productivity?
• How do we maintain a team environment?
• How often should we get together face to face?
When working virtually, a distinct effort is required to build the social structure of the team. Create virtual water coolers or virtual hallways where informal pleasantries and office banter can occur.

Kimball and Mareen Fisher
The Distance Manager
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More notes

To Bridge Distance

• Create virtual time (use asynchronous communication like e-mail and voice mail effectively and use synchronous meetings like Web conferences, teleconferences, or shift overlaps when possible)
• Create virtual space (use Web pages, intranets, virtual offices, etc. to allow team space for collaboration and archives)
• Create virtual culture (provide common focus through goals, measures, charters, operating guidelines, etc.)

Building Trust from a Distance

• Tips for Developing Trust
• Overcoming Isolation in Virtual Teams
• Celebrating from a Distance

Food for Thought

• Think about the most trusting team you've ever been on.
• How was it different than less trusting environments and what did your leader/coach do to make it that way?
More notes

Tips for Developing Trust

Be honest.
Honesty is perhaps the single most important variable that affects trust.

From the outset, set the tone for future interaction.
Carefully review all correspondence, checking the overall tone.
Provide an opportunity for team members to get acquainted before launching into a project or day-to-day work.

To get trust, give trust.
Trusting others is the best place to begin in creating an environment of trust.
Leaders set the example.

Communicate openly and frequently.
Never make team members guess what you are thinking or what is going on with one another.
Use methods that make communication feel more like a face to face interaction.

Do what you say you will do and make your actions visible.
Visibly keeping commitments increases trust.
Distance magnifies the impact of a leader’s perceived lack of action.
Not only is it important to take action, but it is equally critical that the leader make his/her actions visible.

Be accessible and responsive
Respond to e-mail or voice mail messages within 24 hours, IMs as quickly as possible.
Team members look to the leader to quickly get them answers, resources, information, or approvals.
Establish agreements up front on how you will respond and in what time frame.

Make sure that interactions with the team are consistent and predictable.
The process of building trust is not an event - it is a process.
Trust results from predictable interaction over time.

Create social time for the team.
Build informal socializing time into video or teleconferences.
Celebrating from a Distance

- Celebrate mileposts.
  - Don’t limit celebrations to the “big finish.”
  - Consider simple recognition that delineates progress.

- Respect personal preferences when deciding how to celebrate.

- Use “portable parties.”
  - Put together a “party kit” (party hats, horns, confetti, party favors, certificates of achievement, small inexpensive gifts).
  - Have team members bring their kit to the virtual meeting.

- Create a place on your Intranet for posting best practices and learnings
  - This not only allows the team or individual to receive recognition, but also enables team members to learn best practices from one another.

- Include face-to-face celebrations.
  - Bring the team together at key points during the life of a project or at regularly scheduled intervals.

- Include others in the celebration, whether electronically or face-to-face.

- Create the “small” stuff.
  - Acknowledge personal milestones such as birthdays, anniversaries, weddings, the birth of a child, a recent accomplishment such as completing schooling, or a contribution to a community effort.

Overcoming Isolation in Virtual Teams

- Provide new team members with thorough training and an in-depth orientation on how to function in a virtual environment.
- Use visual reminders of one another.
- Create “highway cafes”.
- Create “cyber cafes” on your company intranet so virtual employees can stay in touch and talk informally.
- Use a “hoteling” approach to office space.
- Create a team Web page.

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More notes

Leaders with integrity are honest and consistent about what they say, do, and feel. They have a clear set of values that they will not compromise, and they are non-manipulative, dependable, and trustworthy. The leader with integrity is one who has mastered the competency of being a living example.

Kimball and Mareen Fisher
The Distance Manager
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Using Communication Technologies

• Effective Phone Use
• Tips for Effective Teleconferencing
• Effective Videoconferencing
• Using E-mail
• Effective IMing
• Web Conferencing

Operating Guidelines

• Operating guidelines are agreements for group interaction that are created and supported by all team members.

Tips for Creating Operating Guidelines

• Ideally, operating guidelines are established while the team is still forming and then continually revised and updated as the team progresses. But it is never too late to create them.
• Operating guidelines should relate to all aspects of the team’s work.
• All team members need to be involved in setting operating guidelines.
Examples of Operating Guidelines

- We follow through on everything we commit to do.
- We keep the team up-to-date.
- We always assume good intentions on the part of other team members.
- If we have an issue with another team member, we will contact them personally to discuss the matter.
- Customers are our number one priority. We always make decisions based on what is best for the customer.
- We return calls and e-mails within 2 hours if we are in the office, and within 24 hours if we are not.
- We use agendas for all meetings (virtual or face to face), and send out minutes within two days.
- We will have a face to face meeting at least quarterly.

E-mail Protocol Examples

- When possible we use EOM (end of message) comments in the subject line.
- We clearly identify the subject of the message in the subject line.
- Our messages are short (no scrolling required) and to the point.
- We check e-mails twice daily except weekends and holidays.
- We keep distribution lists current.
- We don't use e-mail for urgent messages.
- We code the top of each message with “requires action” or “FYI”.  
- We don’t spam (send unsolicited jokes, non-work related stories, etc.)
- We treat people electronically the same way we do in person.
- We don't put ANY confidential information in e-mail.
- We don't copy long quotes. We add attachments, if necessary.
- We use emoticons to communicate more clearly.

Voice Mail Protocol Examples

- We do not leave messages longer than 10 seconds.
- We check our voice mail at least once a day.
- We use the "urgent" code only when a message is truly urgent.
- We limit the use of the "group send" option. We use it only when a message is relevant to all members.
- When forwarding messages we will leave an explanatory message so the individual knows why the message is being sent.
- We take accountability to follow up voice mail messages with written documentation when necessary.
- We never use voice mail to leave emotionally charged messages. We wait to talk with the person directly so the problem or issue can be jointly resolved.
More notes

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**Web Conference Protocol Examples**

- We make sure everyone’s technology is working prior to the start of the meeting.
- We all have the same version of the software and do upgrades at the same time.
- We all use broadband connections.
- We code each meeting file with its size and date.
- Only one person controls the whiteboard at a time.
- We never change a file without permission.
- We take turns facilitating and being the scribe.
- The scribe keeps the repository current.
- The facilitator sends out the meeting invitation and agenda at least one week prior to the meeting.

**Intranet or Shared Drive Examples**

- One person will be assigned to evaluate and keep the repository current weekly.
- We all have the same version of each software package and do upgrades at the same time.
- We don’t leave duplicate files on the server.
- We code each file with its name, size, and date.
- We never change a file without permission.
- We use a “check-out” system for files so that only one person can modify a file at a time.
- Everyone in the chat room identifies themselves when they enter or leave a discussion. No lurking.
- We use the same format for all shared calendar entries.
- We keep our individual contact information up-to-date.
- Only the project leader can change a deadline.

**Instant Messaging Protocol Examples**

- We let people know when we aren’t available.
- We only use IM for communication that requires rapid response.
- We assume that if someone doesn’t answer that they are unable to.
- We avoid using IM in important meetings or socially inappropriate settings.
Building consensus is a key to building the trust, participation, and competence that sustain well-functioning teams. Consensus should not be confused with unanimity.

Kimball and Mareen Fisher
The Distance Manager
p. 82

More notes

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**Setting Guidelines and Protocols**

- Have each team member generate his/her own list of possible guidelines.
- Provide an opportunity for each team member to share his/her list with the team.
- Agree on a final set of guidelines that everyone is committed to follow.
- Post the guidelines where all team members have access to them.

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**Team Web Page Sample**

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**Best Practices for Balance**

- Use at home time well ("family nights," get involved with kids schooling/Church/sports, create and honor traditions with loved ones and friends, etc.).
- Schedule family activities and inform team that these are emergency contact only times (e.g., Sundays, dinner time, bedtime for younger children, etc.).
- Share travel gifts (e.g., unique presents, foreign currency, hotel soaps and shampoos, airport treats, etc.).
- Put special personal events on the work calendar (e.g., weddings, children’s games or shows, anniversaries, special Holidays, etc.).
- Make travel accommodations (e.g., no Saturday travel, limit travel to 50% per month, comp time for extensive travel periods, nightly calls home, a family member allowed to travel with manager sometimes, etc.).
- Develop family operating guidelines for vacations (e.g., no cell phone at beach/pool, e-mail checks limited to once daily/weekly, etc.).
More notes

Selected Organizational Practices

- Dow Corning has quarterly “no-meetings week.”
- IBM has a “ThinkFridays” block of Friday afternoon time free of nonessential meetings (People observe them for everyone’s Friday afternoon.)
- PricewaterhouseCoopers encourages people to discuss and schedule around family commitments. This is a major culture shift.

Source: WSJ 2/15/2007

Managing Performance from a Distance

- Performance Management Basics
- Goal Setting and Accountability Systems
- Individual Development Plans (IDPs)
- Socratic Coaching
- Fundamentals of Giving Feedback

Performance Management Fundamentals

- Establish clear expectations.
- Determine a performance management routine.
- Regularly evaluate progress towards established goals.
Some will argue that now or in the near future technology will entirely replace the need for individuals to meet face-to-face. Almost everyone we interviewed, however, stated that while that may be technologically possible, it will not be preferable. The dynamics of a face-to-face conversation, they maintain, can never be fully transplanted by technology.

Kimball and Mareen Fisher
The Distance Manager
p. 123

Establishing Clear Expectations

- Questions to be answered to the satisfaction of the employee:
  - What am I supposed to do?
  - How am I supposed to do it?
  - How will I know when it has been done correctly?
  - How do I get the resources (skills, tools, information, etc.) I need?
  - How do I prioritize my activities?

Performance Management Routine

- Virtual team meetings (weekly Web or teleconferences)
- One-on-one teleconferences (every two weeks)
- Face-to-face team meetings (quarterly or semi-annually)
- Team goal reviews

Socratic Coaching

1. Focus on questions rather than answers (Socratic coaching).
2. Focus on where the information can be found.
3. Maintain primary responsibility with the team.
4. Be frank with concerns.
5. Be ferocious about boundaries.
6. If boundaries are met, be supportive – even when you have doubts.
Socratic Coaching Questions

• How will you know you’re successful?
• What will you do if you’re not?
• What information will you need?
• Who will you need to contact?
• How often will you and I need to touch base?
• How will you measure progress?
• What other alternatives have you considered?
• How will you work to keep the team apprised of developments?

Socratic Coaching Questions (cont.)

• What processes/tools will you use to solve problems?
• What are the priorities?
• What is the backup plan?
• Who should give input on the decision?
• How can I help you improve the business?
• How much will this cost? What will be the impact on the budget?
• What will be the impact of this alternative on quality?

Coaching Questions NOT to Ask

• Yes/No questions
  – Do you have a plan?
  – Have you used data?
• Judgment questions
  – What in Heaven’s name were you thinking?
  – Why did you do that?
  – Why didn’t you check with so and so?
• Abdication questions
  – What do you think you should do?
More notes
Post-Broadcast Activities

Complete and submit the Broadcast Evaluation Form found on the last page of this guide.

Activity 1: Self-Reflection and Discussion

1) What in Kimball and Mareen Fisher’s presentation struck a special chord with you? Why?

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

2) In what ways does your company operate in virtual teams?

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

3) How might distance impact the success of your company in the near future?

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

4) Describe an instance when you led or participated in a virtual team. How did you handle the challenge?

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

Working virtually requires the team leader or manager to give equal time and attention to team dynamics and task accomplishment. In other words, balancing task and process.

Curt Crosby
Senior Quality Consultant
Sun Microsystems
Activity 2: Team Types and Challenges

Mareen and Kimball Fisher have identified six different types of virtual teams, based on the time, space and culture of the team. Answer the questions below to determine the kind of team with which you are involved.

1. Do members of the team normally work during the same hours?
   
   YES  NO

2. Do members of the team normally work together at the same place?
   
   YES  NO

3. Do members of the team share a common culture?
   
   YES  NO

Now match your answers to the examples below to see which team you lead.

<table>
<thead>
<tr>
<th>Question 1</th>
<th>Question 2</th>
<th>Question 3</th>
<th>Team Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>1</td>
</tr>
<tr>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>2</td>
</tr>
<tr>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>3</td>
</tr>
<tr>
<td>NO</td>
<td>YES</td>
<td>YES</td>
<td>4</td>
</tr>
<tr>
<td>NO</td>
<td>NO</td>
<td>YES</td>
<td>5</td>
</tr>
<tr>
<td>YES</td>
<td>NO</td>
<td>YES</td>
<td>6</td>
</tr>
</tbody>
</table>

Once you have figured out which team best represents yours, read the characteristics, examples and distance challenges associated with your particular situation.

<table>
<thead>
<tr>
<th>Type</th>
<th>Characteristics</th>
<th>Examples</th>
<th>Distance Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Different time</td>
<td>24-hour teleservice</td>
<td>Cross shift interaction</td>
</tr>
<tr>
<td></td>
<td>Same space</td>
<td>24-hour warehouse</td>
<td>Multicultural interaction</td>
</tr>
<tr>
<td></td>
<td>Different culture</td>
<td>24x7 factory</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Different time</td>
<td>Global teams</td>
<td>Cross time zone interaction</td>
</tr>
<tr>
<td></td>
<td>Different space</td>
<td>Large projects</td>
<td>Multiple location interaction</td>
</tr>
<tr>
<td></td>
<td>Different culture</td>
<td>Large organizations</td>
<td>Multicultural interaction</td>
</tr>
<tr>
<td></td>
<td>Same time</td>
<td>Different space</td>
<td>Different culture</td>
</tr>
<tr>
<td>---</td>
<td>-----------</td>
<td>-----------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Same space</td>
<td>Regional services</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Same culture</td>
<td>24-hour teleservice</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Different time</td>
<td>Global teams</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>Different space</td>
<td>Same culture</td>
</tr>
<tr>
<td>6</td>
<td>Same time</td>
<td>Different space</td>
<td>Same culture</td>
</tr>
</tbody>
</table>

1) Consider your team. What are your priority challenges based on the team type? What techniques did you learn from the Fishers that may help your team overcome these challenges?

<table>
<thead>
<tr>
<th>Priority Challenge</th>
<th>Ways to Overcome the Challenge</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
Activity 3: Building Trust Across Distance

The Fishers are advocates for building trust in virtual teams, which is harder than it seems. Think of a time when you led a virtual team. Assess how well you created a trusting environment for your employees by addressing how you handled all of the key points Kimball and Mareen Fisher proposed in their presentation.

Assess how your experience aligns with the following statements about building a trusting work environment using a scale of 0-5, with 0 being ‘need development’ and 5 being ‘very capable.’ In the right hand column, identify ways in which you may improve.

<table>
<thead>
<tr>
<th>Steps to Building Trust</th>
<th>Need Development</th>
<th>Ways to Improve Upon this Step</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I was honest with my team throughout the lifespan of the project.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>2. I set the tone for future interaction at the team’s beginning.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>3. I showed my team that I trusted them in order to expect trust in return.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>4. The team communicated openly and frequently.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>5. I delivered on all commitments and showed my team that I was accountable.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>6. I was accessible and responsive to all team members’ communication.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>7. All interactions with the team were consistent and predictable.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
<tr>
<td>8. I created social time for the team to get to know each other personally.</td>
<td>0 1 2 3 4 5</td>
<td></td>
</tr>
</tbody>
</table>
1) In what areas did you succeed at building a trusting environment? What did you do?

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

2) How did the team interact with each other when trust was high?

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

3) In what areas did you struggle with fostering trust among team members? In hindsight, what could have you done differently?

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

4) How did the team interact with each other when trust was low?

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

It is important for all teams to trust the people they work with, but this is even more crucial for virtual teams since employees must rely on people they don’t know personally to deliver critical work that contributes directly to their own success.
Activity 4: Creating and Maintaining an Effective Team Environment

All teams experience challenges during the normal course of business and these challenges are often increased exponentially when team members are scattered throughout the organization, the state, the country, or even the world. Luckily for team leaders, the Fishers have developed some best practices to ensure that problems are identified, managed, and avoided before they reduce the effectiveness of the team.

Use the exercise that follows to assess how you take care of your teams and then brainstorm ways for you to improve upon each area of effective team building.

<table>
<thead>
<tr>
<th>Leadership Best Practices</th>
<th>Need Development</th>
<th>Very Capable</th>
<th>Ways to Improve Upon this Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I encourage my team to create a team charter that outlines the team’s purpose and mission.</td>
<td>0 1 2 3 4 5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. I set goals for my team and frequently measure their results to assess their progress.</td>
<td>0 1 2 3 4 5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. I develop operating guidelines and ensure that team members follow them.</td>
<td>0 1 2 3 4 5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. I clearly define people’s roles and responsibilities at the onset of the team.</td>
<td>0 1 2 3 4 5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. I encourage team members to give frequent and honest feedback about their peers' and my performance.</td>
<td>0 1 2 3 4 5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. I have procedures in place for managing conflict among team members.</td>
<td>0 1 2 3 4 5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. I encourage all colleagues to share their ideas when the group is making a decision.</td>
<td>0 1 2 3 4 5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. I take time to effectively orientate new employees into the team by outlining the team's charter and operating guidelines.</td>
<td>0 1 2 3 4 5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. I develop a strong team training discipline.</td>
<td>0 1 2 3 4 5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Analysis

1. What team building best practices are you currently implementing in your teams? Which areas require the least additional attention?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

2. What team building best practices have you neglected to implement in your teams? Which one or two areas do you need to focus on most?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

3. What steps can you take to thoroughly address those trouble areas?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

________________________________________________________________________

4. What are some specific ways your team’s effectiveness will improve if you take the time to strengthen and develop each of the best practices identified by the Fishers?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Final Activity: Action Planning

Today is the first day of your virtual team initiative. Picture your team(s) six months from now. You’re reflecting with a sense of pride and satisfaction on what you’ve accomplished since the broadcast. As you look back, what one thing brings you the most pride?

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

Back to the present. With the above goal set for six months from now, what intermediary steps do you need to take to reach that goal?

- What do you need to do within three months?

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

- What do you need to do by the end of this month?

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

- What do you need to do by the end of this week?

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

- What do you need to do tomorrow?

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________
Materials Written by Kimball and Mareen Fisher

Books


Articles


Fisher, Kimball. “Teams and the bottom line: Do good results guarantee the sustainability of teams?”


Website

You may also benefit from visiting the Fisher Group website at www.the.fishergroup.com.
SECTION 2

FORMS
Question Sheet

Use this form to write your question for Kimball and Mareen Fisher for discussion. Please write legibly.

Name (optional):
_______________________________________________________________

Organization:
_______________________________________________________________

Location:
_______________________________________________________________

Your question (25 words or fewer):
_______________________________________________________________
_______________________________________________________________
_______________________________________________________________
_______________________________________________________________
_______________________________________________________________
_______________________________________________________________
_______________________________________________________________

Fax 1.877.892.0170 (from within U.S.)
Fax 646.349.3661 (from outside U.S.)

Email: leadership2007@linkageinc.com

Tel 1.800.218.0530 (from within U.S.)
Tel 303.262.2131 (from outside U.S.)
Broadcast Evaluation Form

We invite your feedback on this presentation: Leading High Performance Virtual Teams. Please complete and return this form to your site coordinator or fax it to 781-402-5556.

NAME________________________________ TITLE __________________________________
ORGANIZATION _______________________________________________________________

Please indicate functional area (only check one):

- Finance
- Human Resources/Organizational Development
- Manufacturing/Operations
- Marketing
- R&D
- Sales
- Other (specify) ___________________________________________

How many people do you have reporting to you (include all levels)? **Number:** __________

Please indicate your job level (only check one):

- President or Officer
- Vice President
- Director
- Manager/Supervisor
- Individual Contributor

1) Please indicate a rating for each of the statements below by checking the appropriate box.

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Disagree</th>
<th>Somewhat Disagree</th>
<th>Somewhat Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The length of the presentation was ideal.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>As a result of participating in this program, I will be more effective in my role.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The participant materials were useful.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The Q&amp;A session was valuable.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

2) Please give a general overall comment about the program:____________________________

3) How can we improve these broadcasts?___________________________________________

4) May we use these comments for promotional purposes (including name and org.)? **Y** **N**

5) On a scale of 1-10 (10 = Outstanding), how would you rate this session? **Rating:** __________

6) Which speakers are you most interested in seeing at the next Linkage Excellence in Leadership & Management Series? (Please rate your top five, “1” being most interested.)

   - James Kilts
   - Noel Tichy
   - Ram Charan
   - Keith Ferrazzi
   - Paul Tagliabue
   - Chris Anderson
   - Michael Treacy
   - Bruce Tulgar
   - Jeffrey Sonnenfeld
   - Ann Mulcahey
   - Andrea Jung
   - Other _______________________

7) Which types of speakers are you most interested in seeing? (Please rate your top five, “1” being most interested.)

   - Former C-Level Executives
   - Thought Leaders/Management Gurus
   - Political Leaders
   - Athletic Leaders/Coaches
   - Military Leaders
   - Other _______________________

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Linkage 2007 Excellence in Management & Leadership