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Managing Remote Teams

Turning Distance To Your Advantage

Non-Remote Team!

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What Is A Remote Team?

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The Bottom Line

1. **<u>Any</u> type of dispersion can affect team performance**
2. **Even small levels of dispersion can substantially affect a team's performance**
3. **The amount of negative impact depends upon**
   - The team's task related processes
   - The social skills and self-sufficiency of the potential members

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A Remote Team Can Be

Same building -	**Different floor**
Same campus -	**Different building**
Same city -	**Different building**
Same country -	**Different city**
Different country	

If a team is dispersed at all, closeness can be negative because less effort is expended managing the dispersion

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Remote Team Examples

- **Offshore or offsite development teams**
- **Satellite business offices**
- **Independent developers working from home**
- **Development partners at other companies**
- **Remote clients**
- **Outside sales teams**
- **Teams working from virtual offices**

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Managing Remote Teams

How Common Are They?

Do you manage one or more remote employee?

No 32%

Yes 68%

SHRM 2008

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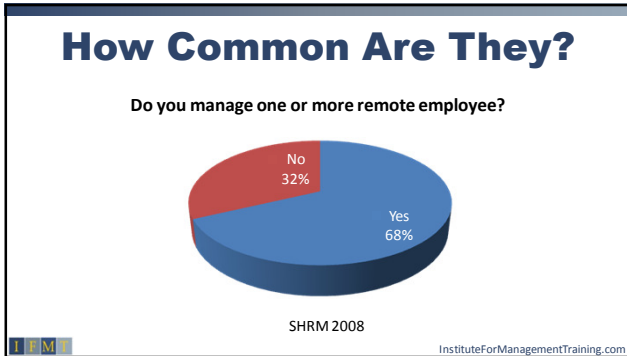
Reasons For Remote Teams

- Multinational offices spanning the globe
- Expertise located at another office
- Joint ventures with other organizations
- Cheaper development cost in other countries
- Subcontract or outsource part or all of a project
- One physical location is not enough to contain all staff

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What Are The Challenges Of Remote Teams?

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Challenges

- **Everything is magnified**
- **Time zones**
  - Travel expenses
  - Communication scheduling flexibility
- **Requires special personality type**
  - Self discipline
  - Accountable
  - Able to work independently

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Challenges

- **Consistency of communication**
- **Missing chit-chat and routine social interaction that builds relationships**
- **Using technology as an end, not a means**
- **Balancing the big picture with details**
- **Tracking costs and results**
- **Discovering the real sources of problems**

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Time Zone Problems

- **Power asymmetries tend to force "weaker" groups to synchronize their time related activities to the stronger ones**
  - Routinely inconveniencing the weaker group can lead to resentment and dysfunction
- **Fine grained time problems**
  - Local holidays
  - Differences in daylight savings time
  - Cultural differences in normal working hours

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Time Zone Problems
Work Speed Impact

Amount Of Workday Overlap	Work Speed Result
No overlap	Best
1/3 overlap	Worst
2/3 overlap	Worst
Complete overlap	Second Best

Fastest -> Slowest
No Overlap
Complete Overlap
1/3 Overlap
2/3 Overlap

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Time Zone Problems
Work Accuracy

Most Accurate – Least Accurate
Complete Overlap
2/3 Overlap
1/3 Overlap
No Overlap

Espinosa, J. A., E. Carmel, & N. Nan. Do Gradations of Time Zone Separation Make a Difference in Performance?
A First Laboratory Study. International Conference on Global Software Engineering, IEEE, August 2007.

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Negotiating Factors

- **Number of people involved at each site**
- **Status of site**
  - Ex: headquarters has more status
- **Status of people at the site**
  - Having people with special expertise, seniority, or access to important local information influenced the negotiation
- **Cultural deference**
  - Participants from some cultures were more deferential, especially if there were differences in status involved
- **Flexibility**
  - Many factors (professional and personal) affected the scheduling flexibility of the participants

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Time Zone Tips

- **Match work to time zones**
  - Make sure that one person or part of team isn't dependent
- **Assign backups**
  - In case someone quits and you can't hire quickly because of distance / time constraints
- **Remote access**
  - Make sure you can access remote files, emails, etc.

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What Are The Advantages Of Remote Teams?

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Advantages

- **Flexibility**
  - Can be created and disbanded as needed
- **Responsiveness**
  - Less likely to have "group think"
  - May bring different cultures
  - Work can continue across time zones if necessary

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Advantages

- **Lower costs**
  - Pools of inexpensive, highly skilled workers around the world
- **Improved resource utilization**
  - Performing work asynchronously helps global organizations effectively bridge different time zones so that teams can be more productive during a work period

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Disadvantages

- **Schedules and plans can develop in isolation**
- **Problems can remain hidden longer**
- **Social interactions must be created on purpose**
- **More detailed reporting is required**
- **Problems and challenges are magnified**
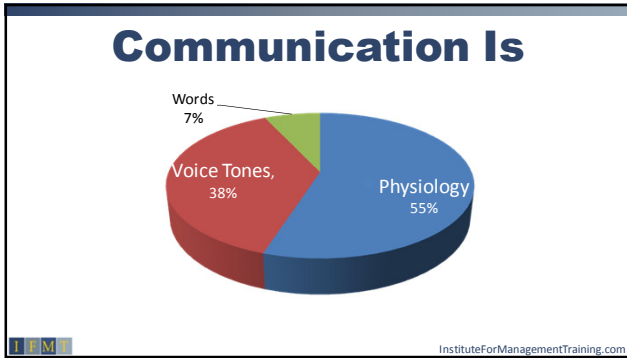- **Special personalities are required**

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Communication Issues

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Communication Is

Words
7%

Voice Tones,
38%

Physiology
55%

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The Impact

- **Words & voice tones take on additional importance without physiology**
- **Managers must expend additional energy**
  - Building relationships
  - Managing tasks
- **Vacuums and rumors form**
- **Assumptions are made**
  - Both good and bad

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The Impact

- **Because there is less frequency of communication, the impact of each communication is greater**
  - Both positive and negative
- **It takes longer to draft written communication than spoken communication**

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Solving The Missing 55%

- **Additional words required if using email**
- **More structure to calls**
  - You can't tell when someone is bored or overloaded
  - Use an agenda so that calls are structured
  - Schedule time for chit-chat and personal interaction
    - Don't give in to the temptation to make it all about work
- **Use video conference tools**

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Video Conference Tools

- **Skype Meeting**
- **Google + Hangouts**
- **Both are limited to ten participants at a time**
- **Both can share files and links during a call**
  - Google allows real time collaboration

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Skype Meeting

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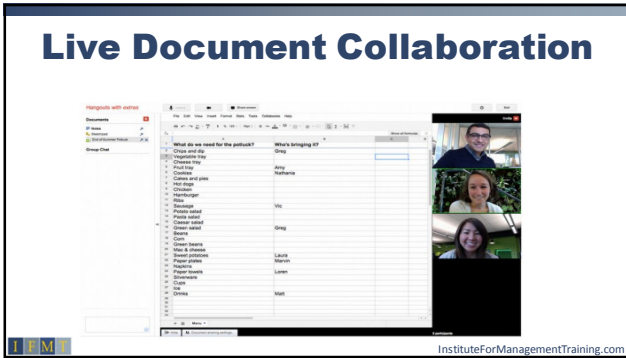

Skype Meeting

Google + Hangouts

- Sign up for Google +
- Use "Hangouts" with extras
- Can collaborate with Google Docs real time during meeting
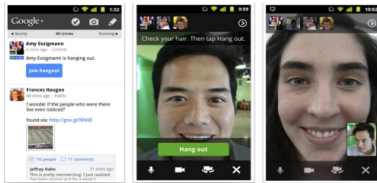
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Google + Hangouts

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Live Document Collaboration

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Google + Hangouts

- **Also works from mobile devices**

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Video Conference Challenges

- **Scheduling**
- **Over reliance on eye contact**
  - Other non verbal signals are reduced
- **Stage fright**
  - Self-consciousness at appearing before a camera can influence people's mannerisms, body language and ability to communicate effectively
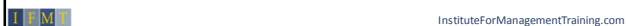
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Quiet People

- **Make it easy for quiet people to participate by supplying passive technology options.**
  - Idea blog
  - Forums
  - Instant Messaging

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Communication Standards

- **What types of events should be handled how and when**

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Communication Standards

- **What types of events should be handled how and when**
- **Example:**

Event	Method	Deadline
Conflict with another team member	Immediate email with follow up phone call	4 hours

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Communication Tips

- **Use the 'information-richest' form of media available to communicate**
- **Encourage spontaneous, informal communication between your team members.**
- **Make time for socializing during remote discussions**
- **Avoid 'virtual silence'**
  - Acknowledge communication even if you don't respond immediately

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The Remote Leader

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My Definition

The purpose of a leader is to get people from _____ to _____.

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My Definition

The purpose of a leader is to get people from HERE to THERE

Here → There

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Remote Leadership

In addition to the requirements of traditional management, remote leaders need five additional qualities

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Your Keys To Success

1. • Energy
2. • Availability
3. • Patience
4. • Reliability
5. • Flexibility

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Energy

- **Have enough energy that you can transfer it to the team**
  - The further the distance, the more energy required
- **Be able to handle interruptions**
  - Because of time differences, you must handle them immediately
- **Constantly check in with team members**

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Energy

- **Working with non-native language speakers takes extra attention and energy**

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Availability

- **Be prepared to handle work at times when you would not normally be working**
  - You may need to adapt to their time zone
  - Your availability shows support
- **Set wide guidelines and enforce them**
  - Ex: 6AM – 10PM in your time zone
- **When the phone rings… answer it**
- **When you get an email… deal with it**

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Patience

- **Routine activities can take longer**
  - It might take two hours to schedule a 10 minute meeting
  - Getting together in person can take days instead of hours
- **Group interactions take longer**
  - Not much opportunity for spontaneous interaction
  - IM & Skype can be spontaneous if time zones allow
  - Everything must be scheduled

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Reliability

- **Even more important with remote teams**
  - Missed deadlines and commitments take on extra importance
  - They don't know you as well as local team members
  - They don't know what's "going on" that might have caused you to miss the deadline

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Flexibility

- **Adapt to each team member**
  - Is one a slow typist? Use the phone
  - Is one shy? Use email
- **Adapt to their schedule as much as possible**
  - Cultural work schedules

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Flexibility

- **Watch for withdrawal**
  - Even if work is getting done, less frequent contact can indicate a problem
- **Build a network**
  - So that you get early warning of problems
  - Never reveal the source of your information

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Email Best Practices

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Best Practices

- **Keep it simple**
  - No more than one idea
  - No more than one page
  - Only one font and color
- **Don't abbreviate unless everyone understands**
- **Read it out loud before you send it**
  - The more important it is, the more times you should read it

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Best Practices

- **Hold the attachments**
  - Unless requested
- **Prevent an accidental send**
  - Don't put in the "To" address until you are ready to send
- **DON'T SHOUT**
- **Answer all questions**
  - So there is no need for back and forth

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Best Practices

- **Make it personal**
- **Include message threads**
- **Don't use 'high importance' unless it really is**
- **Use a meaningful subject line**
  - "Dallas meeting date request" vs. "Dallas meeting"
  - Don't re-use Re:
    - Re: Re: Re: Re: Re: Dallas meeting date request.

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How To Get A Quick Response

- **Be brief**
  - Make it easy to read and understand
  - Use bullet points, short sentences and an attractive font
- **Give them context**
  - Make sure they understand any other information needed to respond
  - Remember to include any previous message threads so they don't have to search for them

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Quick Response

- **Give them something to act on**
  - Tell your reader exactly what response you want so that they don't have to guess or send you an email asking for clarification
- **Set reasonable expectations so it is easy to respond**
  - Unless you are their supervisor, don't ask for something that will take an hour of work to produce.
- **Give them a reason**
  - A simple explanation of the benefits of responding will do wonders

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Quick Response

- **Use a deadline to keep your email from being put on the "later" pile.**
  - If you have made it easy to respond and have given them a deadline, you can expect a quick answer.

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Nine Steps For Success

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1 — Plan Carefully

- **Break projects down into the smallest tasks possible**
  - Makes reporting easier
  - Prevents misunderstandings
  - Helps to prevent things from falling through the cracks

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1 — Plan Carefully

- **Specify priorities**
- **Create benchmarks**
- **Assign responsibilities**
- **Establish frequencies**
- **Who has authority to make decisions**
  - What happens if they are not available

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1 — Plan Carefully

- **Identify threats and risks to the project**
  - Contingency plans for serious risks
- **Make sure resources are allocated**
- **Align with your rewards system**

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2 Culture & Environment

- **Work to create team synergy if desired**
- **Create a team identity**
- **Respect other cultures**
  - Optimize for the strengths and weaknesses of other cultures

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2 Culture & Environment

- **Create opportunities to help team members get acquainted with one another**
  - Team members create rules of engagement which make explicit the what, when, who, and how of decision-making and communication within the team
  - Nature and frequency of communication, communication media to be used
  - The values that the team will live by, the response times for messages, how conflict will be resolved, and how the decisions will be made, including who makes what decisions

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3 Communication

- **Create an open and honest conversational work environment**
- **Optimize across time zones**
- **Use appropriate technology to your advantage**
- **Provide specifics related to expected frequency**

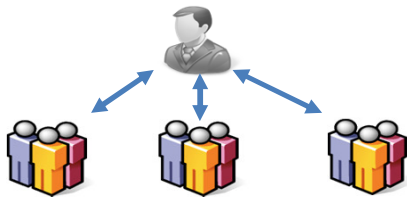InstituteForManagementTraining.com

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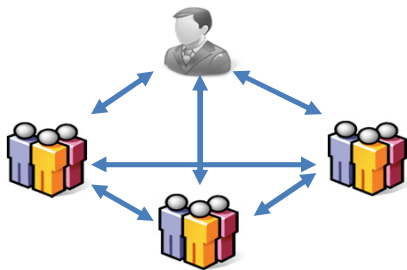**Vertical Communication**

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Horizontal Communication

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Managing Remote Teams

4 Constant Reporting

- **Establish standards**
- **Use the metrics created during the planning process**
- **Produce requirements documentation**
- **Require constant status reports**
  - Saves time in the long run
  - Follow up immediately if you don't receive them

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4 Constant Reporting

Example:

Frequency	Task	Who	Method
Daily	Individual status updates	Everyone	Email, Project management software
Weekly	Progress reports	Team leaders	Written + phone or video conference to discuss
Monthly	Progress review. Cost & budget reviews.	Team leaders & managers	Written + video conference
Quarterly	Review & planning	Team leaders & managers	Video conference or in person

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5 Follow Up Constantly

- **Catch issues before they become breakdowns**
- **Be proactive with all team members**
  - Unplanned and unexpected contact can be beneficial
- **Unattended problems don't get better, they get worse**

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6 Careful Member Selection

Successful
- Self-sufficient
- Self-motivated
- Self-disciplined
- Strong work ethic
- Self-aware
- Self-possessed
- Mature
- Able to communicate clearly in writing

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6 Careful Member Selection

Successful	Unsucessful
• Self-sufficient	• Needs direction
• Self-motivated	• Motivated by peer approval
• Self-disciplined	• Structure-oriented
• Strong work ethic	• Party animal
• Self-aware	• Still wondering
• Self-possessed	• Needs reassurance
• Mature	• New to the work world
• Able to communicate clearly in writing	• Poor writing skills

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7 Develop <u>Your</u> Skills

- **Virtual team building**
- **Build trust**
- **Celebrate**
- **Project management**

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Virtual Team Building

- **Purpose: create unity and trust**
- **Method: each team member shares a personal item via webcam**
  - Baby picture, coffee mug, award, toy, hobby, etc.
  - Prepare 1 minute to tell other team members about it
  - Team members have 2-3 minutes to ask questions

Virtual Team Building

- **Tips for success**
  - Allow several days for preparation
  - Require participation
  - Allow a total of about 5 minutes for each team member
  - You go first
  - If members are asking questions, you know they are engaged

Build Trust

- **<u>Always</u> be honest**
- **Be consistent and predictable**
  - Sharing good news or bad
  - Regardless of whom (what level) you're dealing with
- **Admit mistakes when they happen**
  - A cover-up (real or perceived) creates mistrust

Build Trust

- **Don't make team members guess what you're thinking**
  - No news is bad news
  - Uncertainty builds doubt, which builds suspicion
- **Make your actions visible**
  - Example: "In response to your question, I contacted Jim. He'll get back to me by Monday. Thanks for noticing the problem."

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Celebrate

- **Acknowledge team and individual accomplishments**
- **Celebrate frequent milestones**
  - Don't wait until the end of the project
- **Recognize personal events**
  - Birthdays, anniversaries, children, community activities, etc.

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Celebrate

- **Ask the team members what they prefer**
- **Make the celebrations face-to-face when you can**
- **Include others, such as senior management or on-site coworkers of geographically dispersed team members**
- **Give online gift certificates.**
- **Remember that voice mails and thank-you cards count, too.**

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Handle Conflict
Causes Of Conflict

Differences Over
•Perceptions
•Facts
•Priorities
•Methods

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Handle Conflict
Causes Of Conflict

Differences Over	Competition
•Perceptions	•For resources
•Facts	•For supremacy
•Priorities	
•Methods	

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Handle Conflict
Causes Of Conflict

Differences Over	Competition	Interpersonal
•Perceptions	•For resources	•Personalities
•Facts	•For supremacy	•Prejudice / Bias
•Priorities		•Hurts
•Methods		•Communication

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Handle Conflict
Causes Of Conflict

Differences Over	Competition	Interpersonal	Other
•Perceptions •Facts •Priorities •Methods	•For resources •For supremacy	•Personalities •Prejudice / Bias •Hurts •Communication	• Information vacuum • Unfulfilled expectations • Different time horizons

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Handle Conflict

- **Check e-mails for signs of conflict, and follow up by phone**
- **Choose your language carefully**
- **Follow steps for conflict resolution**
  - Acknowledge the problem: clarify and summarize differences
  - Drain emotions: allow each side to vent (not attack)
  - Identify common interests and goals
  - Brainstorm solutions and choose the best alternative
  - Summarize and document agreements

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Assigning A Project

- **What information and resources do you need?**
- **How will you work with other team members on this?**
- **What processes/tools will you use?**
- **How will you know if you're successful?**
- **How can I help?**

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During A Project

- **What are the priorities?**
- **What obstacles are preventing progress?**
- **How is this situation affecting the budget?**
- **What alternatives have you considered?**
- **How can I help?**

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Avoid Badly Formed ?'s

- "Paula, you are in charge of the engineering group; why did you allow them to enter confined areas without following procedures?"
- "We had multiple violations in almost every department! Does anyone around here follow the proper safety procedures?"

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Checkup

1. **I manage by results rather than rely on overseeing warm bodies**
2. **I attempt to simulate face-to-face interactions in my communications with team members**
3. **I demonstrate personal integrity by admitting mistakes when they happen and by being consistent and predictable**

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Managing Remote Teams

Checkup

4. I consciously avoid meddling and micromanaging while maintaining accountability

5. I actively seek opportunities to coach employees

6. I acknowledge team members' birthdays, anniversaries and other personal events

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Checkup

7. I build partnerships with other managers to facilitate resource sharing, especially of employees' time

8. I communicate with my team members daily in some way

9. I look for signs of conflict and help team members resolve it before it escalates

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8 After Action Reviews

- US Army runs the most complex remote team organization in the world

- Uses a system of constant feedback to constantly improve

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8 After Action Reviews

- **Seek candid insights into specific strengths and weaknesses from various perspectives**
- **Feedback and insight critical to improved performance**
- **Details that are often lacking in evaluation reports alone**

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8 After Action Reviews

- **It does not judge success or failure**
- **It attempts to discover why things happened**
- **It focuses directly on the tasks and goals that were to be accomplished**
- **It encourages employees to surface important lessons in the discussion**
- **More employees participate so that more of the project or activity can be recalled and more lessons can be learned and shared**

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After Action Reviews

Initial Objective
- What was our intended results?

Learning
- What caused our results?
- Both positive and negative

Experiments
- Where and when can we test our new learnings and goals?

Reality Check
- What were our actual results?

Goals
- What will we sustain or improve?

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9 **Face Reality**

Forget Control... You Don't Have Any

Virtual Employees Are More Like Customers Than Employees

Treat Them As Such!

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