Virtual Team Best Practices

Leaders Toolkit Corporation

- Adopt a common metaphor or visual image for the team.

- Develop shared team artifacts such as a graphic image that reflects the team's mission or values.

- Plot the location of all team members on a local, regional or world map and distribute to all team members.

- Use photos of each site's surroundings to give team members a sense others' workspace.

- Organize virtual "retreats" as group pause for thought and reflection Use chat mode for a real time event, or a threaded discussion for asynchronous events. Select a team member to moderate.

- Establish story telling rituals to give team members time and space to share what's happening. Give a story title, for example, "most challenging customer and how you satisfied them," to engage the team.

- Use video conferences to host occasional informal gatherings. For example, some teams host celebrations of important project milestones via video conferencing. Others create shared coffee break rooms virtually by using video cameras (web cams) and monitors to link sites.

- Send virtual cards for birthdays, special local holidays, congratulations, milestone completions, and other special occasion.

- Encourage informal lateral conversations among team members by assigning small groups of 2-3 to work on an interesting task. For example, team members can distribute relevant industry articles and start a team dialogue about them.

- Create a buddy system among team members so that each contributor has someone else they can talk to about team issues.

- Allocate time at the beginning of regular conference calls for informal chat. Initiate this kind of conversation by emailing a thought provoking question to the team before a meeting and asking each person to respond to it.

- Begin an email exchange or a threaded conversation on a topic not immediately related to tasks and deliverables. One global new product development team chose to discuss the latest research relevant to their product. Another team discussed hiring practices in different countries.

- Invite outside "experts" to present to the team, either synchronous or asynchronously.

- Establish a web space where people can post jokes, funny stories, pictures, questions, or comments. Rotate a facilitator for this space.

- Establish a team "call and response" process for circulating important news throughout the team. This process is initiated when someone makes a request and other team members respond within a designated time. A sales team used this approach to get team involvement and suggestions for important sales presentations. A technical support team used "call and response" to generate ideas to solve difficult problems.

- Circulate conference call hosting across the team according to where the important work is taking place. Let people in that location put together the agenda to focus attention on their part of the team. This is useful when tasks and deliverables are divided by location.

- Circulate frequent short reviews of progress toward fulfilling team charter or mission. Rotate responsibility around the team for this process.

- Scan SWAN and your personal network for corporate announcements and events that might affect your team's work. Create a way to spread this important information across the team. A team involved in implementing a key corporate initiative used a "Strategic Announcement" email subject line to focus attention.

- Some teams only recognize accomplishments on a local and individual basis. Focus team attention by celebrating key milestones or accomplishments virtually as a whole team.

- Create a team artifact that each team member can display in their own environment so others are reminded of the team. Examples include team posters, flags, mugs and other physical objects.

- Establish a team "look and feel" on the web, something that is unique to the team's mission. Team members can use this as their home page on SWAN.

- Label a physical mail box for each team member where ever they pick up interoffice mail. Address items in care of the team.

- Distribute a team photograph (or individual photos of all team members) to the whole team.

- Establish a steady flow of relevant communication. This involves both distributing information and having conversations about the information.

- Use multiple avenues of communication redundantly. Most people have noticeable preferences for different communication technologies, whether e-mail, voice-mail or some other tool. Communicate using as many of the available tools as you can.

- Keep people informed of your schedule. If you are going on vacation, or to an offsite location, let people know.

- Offer to help someone with your knowledge and experience. For example, send a summary of your key learnings on a similar project you recently completed.

- Open up an e-mail exchange or threaded conversation by posing a thought-provoking question. The question should be related to the work your team does, and it shouldn't be directly related to a deliverable or task.

- Familiarize other team members with some of your personal background. For example, if you have a particular hobby or outside interest, let your team members know about it. Some people might like others to know of their children, or of a sport they follow.

- Create a team map X local, regional, or global depending on the team's distribution X marking the name (photograph, if possible) and location of each member. Post it in a location you see frequently as a reminder of the team's presence.

- Develop a team ritual that can be practiced at each site. Make it fun and energizing. For example, when key goals or milestones are met, spend 20 minutes celebrating online at your next conference call. Distribute a small gift to be opened during the call as an acknowledgement.

- Make "check-up" phone calls just to learn how a team mate is doing.

- Open conference calls by giving each person a few minutes to talk about how they are doing, and to share their challenges and successes.

- Check voice mail every day and respond to calls within 24 business hours. (*Business hours are based on global time zones. Response could take as long as three days*).

- Check e-mail everyday and respond to messages within 24 business hours.

- Use phone, video-conference or face-to-face meetings for resolving differences, not e-mail.

- Inform all team members via e-mail if you will be unavailable for more than 24 business hours.

- All text documents are to be created using _____ (name of program).

- Post task or deliverable updates to our team web site at least once a week.

- Establish decision-making authority to make changes in shared tasks, deliverables, and documents at the beginning of the work.

- Make agreements/decisions using consensus. If consensus can't be reached within a designated time, decision-making authority falls back to a designated person. (i.e. team leader, subject matter expert, regional driver, etc.)

- Rotate meeting times to recognize time zone differences and discomforts.

- Date all requests for feedback, input, and advice and state the urgency of the issue.

- Any materials needed for review before or during a meeting must be distributed at least 48 business hours before the event.

- Rotate responsibility for organizing staff meetings, project reviews or other important team events to people in different locations.

- Do a team update of each member's current work and priorities once a month.

- Establish an agreed upon time to meet for project status on a regular basis. Everyone is to attend, no exceptions.

- Send out a detailed agenda at least 24 hours before the call. Make it 48 hours before hand if people will be joining from very distant locations.

- Distribute all material, slides, and presentations at least 24 hours before the call. Make it 48 hours if people will be joining from very distant locations.

- Assign a facilitator to keep the call on track. Remember, conference calls need more structure that face-to-face meetings. Set firm ground rules and stick to them.

- Limit interruptions and digressions.

- As you start the call, check to see that everyone across all locations can be easily heard. Think of it as a "sound check:" If there are problems, take care of it before the meeting gets underway.

- If new documents are generated during the call, distribute them as quickly as possible via fax or e-mail. Better yet, use your team website or shared team space to post documents directly as they are being created.

- Share responsibility for the call's success by assigning participants specific roles, for example, note taking, tracking important items, time keeping, etc.

- Speak clearly—don't shout (especially on a speakerphone), and avoid slang that may not be familiar to call participants from other regions, cultures, or countries.

- When you jump into the conversation, preface your statement with "This is ____" (your name).

- Encourage participation through directing questions to specific people. Don't let participants remain silent for more than 15 minutes. Unless there is a prearranged presentation that everyone is listening to, there should be active engagement throughout the call.

- Don't try to do anything else while on the call. Other participants can hear you typing and won't appreciate it. If you must attend to something else briefly, use your "mute" button or put the call on hold.

- Wrap up the end of the call, as you would any meeting. Summarize what was said, confirm decisions, and reiterate steps for future action. Distribute notes on the meeting immediately via e-mail, and follow up on the action steps.

Team Agreements Worksheet

Areas for Communication Agreements	Informal Collaboration	Decision-Making	Information Sharing	Meeting Protocols	Project Updates	Other:_____
Current and Upcoming Challenges						
Proposed Communication Agreements						