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Managing a Virtual Team

by Mark Mortensen and Michael O'Leary | 9:52 AM April 16, 2012

Teams that are geographically-dispersed, or virtual, have now been used and studied for more than three decades — yet we all still wrestle with how to get them right. Managers frequently ask for best practices for managing their global teams, and recently we've noticed some common themes. Here are the three questions that keep coming up again and again, and what the research tells us about how to address them:

1. When and how often do we need to meet face-to-face (FTF)?

Despite the appeal of completely virtual teams, most team leaders try to convene their teams for face-to-face meetings at some point — leading them to ask how often and when should they do so. We share two robust findings to consider when planning face to face meetings.

First, research by Maznevski and Chudoba (http://orgsci.journal.informs.org/content/11/5/473.abstract) , Carmel (http://www.amazon.com/Global-Software-Teams-Colloborating-Borders/dp/013924218X) , and others finds that FTF interaction is especially important early in a team's life, particularly when the team is comprised of people who don't already know each other. "Early," however, doesn't necessarily mean "first." Having some initial virtual interactions before a first FTF meeting can actually enhance the benefits of that first FTF meeting by allowing team members to focus on things like who has what task-related expertise before they are influenced by the potential biases that FTF interaction can trigger. Then, the first FTF meeting can be used to establish the work practices the teams will need to effectively collaborate when the pressure mounts.

Second, Maznevski and Chudoba (http://orgsci.journal.informs.org/content/11/5/473.abstract) also found that repeated FTF meetings are best when occurring at predictable times and intervals. This allows team members to plan their time and interactions, reserving discussion of certain complex or delicate issues for those in-person interactions. As a result, teams with a predictable rhythm of meetings outperform those who choose to meet "as needed" — even if they have less FTF interaction overall. So FTF meetings should occur early and regularly.

2. What is the best technology solution for my team?

With the relentless advance of technology, many managers ask us which platform they should use to support their virtual teams. As any suggestion we make will be outdated before the pixels are displayed — we encourage managers to focus on the criteria that shape their daily behavior. We tell them: Ask yourself, why do we rely so heavily on phones and e-mail — technologies that haven't fundamentally changed much since they were introduced? We rely on them day in and day out because they provide the communication trifecta: simplicity, reliability, and accessibility.

- **Simplicity:** neither require complex setup time or a steep learning curve — as soon as we have dialed a number or entered an address, we are able to focus on the message, not on the medium. Remember, rich interactions don't require rich media.

- **Reliability:** despite the occasional service interruption, we spend very little time worrying about whether our messages will get through to their intended targets.

- **Accessibility:** phones and email both work just about everywhere we might want to use them — meeting rooms, field offices, airports, even our favorite coffee shops.

In the era of feature-creep, where each new version of a technology is marketed on the basis of countless incremental bells and whistles, remember: each minute your team members spend trying to get the slick new system up and running, bringing it back up after a crash, or unable to access it from a field office brings them that much closer to throwing in the towel and picking up the phone.

3. How do I coordinate work among dispersed members?

Many managers have recounted variations of the same story: they received an eagerly-anticipated hand-off from

their distant colleagues only to discover that the work bore little resemblance to what they expected (and were counting on). The net result was wasted effort by their colleagues, unanticipated rework for them, and frustration all around. They ask us: "Why does this keep happening, how can I avoid such coordination breakdowns?"

People have evolved to become extremely good at dynamically adapting to our social environment. In teams, we constantly synchronize and modify our actions and expectations to keep them aligned with those of our collaborators. Unfortunately, this is precisely what distributed teams are bad for. Cramton's study (http://orgsci.journal.informs.org/content/12/3/346.abstract?ijkey=89e45d7c9c02a19da8a11b8c5e853a2e5d43a9a7&keytype2=tf_ipsecsha) of dispersed teams found that dispersed team members lack a common, shared understanding — critically necessary for such adaptation. Making matters worse, Hinds and Mortensen (http://orgsci.journal.informs.org/content/16/3/290.abstract) found that when distributed, we tend to engage in relatively little of the spontaneous and informal "water-cooler" communication that both promotes shared understanding and is the vehicle for adaptation.

So managers of virtual teams should have dual, complementary objectives: structure and socialize. First they must shift their teams' work practices away from the dynamic adjustment outlined above towards more structured coordination. Clear team-level work processes, output requirements, and group norms reduce the complexity of virtual team coordination from coordinating efforts across multiple sites to aligning one's efforts with a single, consistent set of expectations. Second, as the speed of today's economy means no team — collocated or distributed — can eliminate all such dynamic adjustment, virtual team managers also work to support and facilitate dynamic adjustment when it's required by promoting and encouraging informal interaction.

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