

Virtual Leadership Competencies

“Leaders Leading Leaders and Teams”

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Globalization, technological advances, telecommuting, and outsourcing have all created a workplace where leaders rarely see the individuals they lead, and often struggle to use their skills without face-to-face contact. With so many leaders managing team members who are living in different time zones, countries, and continents, or even just in different locations in the same city, there is an ever increasing need for people who don't see each other frequently to figure out how to work better together.

Leaders are expected to create and manage virtual teams in ways that ensure successful launches of projects, good decision making as well as to maintain the commitment of team members doing work together. Some of the competencies required to execute virtual relationships are effective and efficient

- Communication including listening and feedback
- Planning and orchestration
- Inclusiveness
- Collaboration

The following best practices were collected using interviews, focus groups and our own experiences in working with global and virtual teams. We appreciate your feedback and sharing your own experiences and suggestions for future versions.

Manage from a Distance

Get to know employees as individuals

- Learn the goals, motivations, needs, and experiences of team members.
- Find ways to recognize changes in behavior
- Express your desire and need to connect with regular check-ins. Be clear about the why, how and timing for communication
- Adapt to the personality and working styles of those with who you work

Build a virtual community

- Acknowledge cultural differences in how employees interact
- Remember employees pick up cultural clues and norms by observing behavior, dress, language, behavioral norms, and communication patterns

- Connect team members to the larger organization by actively facilitating collaboration, creating a team culture, and uniting virtual workers to build community spirit (see suggestions below)

Focus on talent development

- Stay focused on the goals and aspirations of each employee with regular calibration meeting
- Conduct career and personal goals discussions regularly
- Find creative ways to provide opportunities for visibility from a distance
- Pay attention to changes in engagement, satisfaction and communication; the manager must work harder to build satisfaction, trust, loyalty, and retention for valuable employees

Conduct Virtual Meetings

Prior to Teleconferences/Video-conferences

- Send an agenda ahead of time (early as possible) with allocated time slots for agenda items
- Provide lead time for responses to requests; consider different time zones and multiple projects
- Distribute suggested ground rules and meeting etiquette ahead of time
- Vary the meeting time so everyone has the opportunity to participate during their most creative and productive times
- Rotate global meetings so participants in other parts of the world do not always have to wake up early or stay up late
- Reserve a conference room if you are easily distracted or multi-task in your own office
- Secure a land-line and avoid cell phone. Cell phones go in and out of range, generate static noise and cease functioning
- Prepare an alignment tool for members to use moving forward (website links, team charter, action plans, etc.)

During to Telecons/Videocons

- Identify yourself when meeting “virtually” for the first time
- Assign a facilitator
- Specify a timekeeper to keep participants on task
- Collaboratively define behavior that will contribute to the “success” and trust of the group:
 - Establish and align members’ around shared objectives

- Define the distinct roles and clarify these for all members
- Espouse copyright adherence for documents
- Ensure confidentiality of communication and contributions
- Use “mute” button sparingly; only if there is noise in your environment
- Identify yourself when you first speak if it’s a small group (4-5 people)
- Identify yourself every time you speak in large telecons (5 or more)
- Gesture normally; greater vocal variety and interest occurs when speakers gesture
- Ask questions if you don’t understand something or have lost the conversation thread
- Be fully present; avoid multi-tasking.
- If using documents or slides, indicate the page you’re on and indicate when changing pages
- Avoid moving the speaker phone or rustling papers in front of the phone. It’s painful on the ears of those dialing in!

After Teleconferences/Video-conferences

- Follow through on commitments
- Pre-published goals and presentation materials
- Avoid relying on members on-site with you more than those at a distance

Launch Virtual Teams

Pre-Launch

- Bring team members together face-to-face for an initial launch meeting when possible
- Avoid video-conferencing across multiple time zones
- Establish ways for team members to get to know each other better professionally and personally (exchange CVs; include photos on website and/or in presentations; roles, etc.)
- Use web tools as appropriate

First Meeting

- Make sure each person has an assignment (real work) from the first meeting
- Make note of who is and who is not participating so silent members aren’t overlooked

Foster Trust

- Conduct the first team meeting using a familiar and not technically threatening technology such as teleconferencing

- Encourage members to call in from their own offices rather than having groups assemble around a speakerphone in a conference room. This prevents isolation of one member, perceptions of others “teaming” up on issues, using mute for side conversations, etc.
- Until members feel safe, most are reluctant to leave work in process in an "electronic place" that is open for others to see. Work in progress exposes how members test ideas and/or what they don't know publicly.
- Begin team with “safe” rather than “risky” work.
 - Safe work - helping to establish the project's parameters, milestones, schedules, budgets, and overall goals
 - Risky work - undertaking individual tasks such as developing innovative solutions to problems and trying out new approaches and techniques.
- Allow members to test ideas within each person's network or with a partner to build more trusting virtual teams
- Clarify decision-making process and avoid off-line decision making

Ongoing Meetings

- Focus on the “real” purpose (vision) for the team at the beginning of each meeting Give frequent recognition for all the virtual team accomplishes together
- Structure pairs of people to work together
- Make note of who is and who is not participating so silent members aren't overlooked
- Use roll call voting to confirm concurrence on a topic
- Create anchors for the team to ensure trust and equal access to information (summarize team meetings; maintain action items and deliverable charts; distribute information to all team members; communication plan with backup system when members can't attend meetings, etc.)

Manage Technology

- E-mail a structured meeting agenda to participants ahead of time and to use a moderator
- Ensure members feel knowledgeable about and comfortable with the use of various electronic technologies
- Create and maintain a "level electronic playing field."
 - Provide training for members who were unfamiliar with the ins and outs of a particular technology such as: e-mail, teleconferencing, computer and videoconferencing, and common databases (for storage and reference)
 - Team member's lack of facility in using computer conferencing can exacerbate tensions that exist between individuals
 - For collaboration with written, graphical and image products, members need equal familiarity and skill using electronic tools