Working with virtual teams – tools, techniques and success factors

Virtual teams are individuals or groups who dispersed geographically but work together to accomplish a common goal or a project scope. These teams may have limited or no face to face interactions between them. Though the team members may be physically located in different geographies, they share a common goal among them and have roles and responsibilities defined like any other project teams. Virtual teams are rapidly becoming a standard and are no longer an exception for special cases. There is a strong business justification for having virtual teams which is primarily due the cost benefits associated with them. Cost although a primary factor, may not be the only for having virtual teams, knowledge availability is also a key driver. Sometimes the required knowledge and skills might not be available locally or at one place. In such cases a virtual team might be a very good option. Similarly virtual teams are also created to address time zone related requirements i.e where round the clock work is required, in such cases the work is shared been teams located in different time zones.

Let’s look at some tools and techniques that are useful while working with virtual teams as well as some critical success factors

**Tools (Technology)** – Tools that facilitate working with virtual teams include software, hardware and the underlying technology that supports or enables them. The tools also include the innovations in network infrastructure which is the backbone for virtual teams enabling organization to operate in a true border-less ecosystem. These tools are primarily technology driven and facilitate collaboration and communication between teams.

**Collaboration Tools** – These set of tools enable teams to work with each other to accomplish the common goal. Virtual teams need to interact in the same manner as other traditional teams, the collaboration tools facilitate this interaction. Collaboration tools include

- **Enterprise Wiki** – Wikis have been hugely popular with the open source and development communities for quite some time. However they are also being adopted to be used at an enterprise level. The main feature of a wiki is that it allows online collaborative editing of documents thus making it an ideal tool when working with virtual teams. Wikis also allow synchronous collaboration rather than asynchronous collaboration.
- **Document Management Systems** – Document Management systems allow storing, sharing, archiving and retrieval of documents. As virtual teams are located different physical locations a centralized document management system provides an efficient

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mechanism to share documents. Most document management systems also allow implementation of role-based access so that enterprises can implement appropriate security policies. Document management systems can be implemented in-house like using packaged applications like SharePoint or can be used implemented in SaaS model over the cloud like Dropbox.

- **Resource Virtualization** – Virtualization is the technology of creating virtual computing resources from a limited resource. Although this is not exclusively a tool for virtual teams, it can be nevertheless leveraged quite effectively in a virtual team environment. Teams can utilize the virtual and parallel computing features in a secure virtual private network to work seamlessly in parallel. Examples include VMWare and Oracle Virtual Box.

**Communication Tools** – Communication tools are more focused on information sharing. They facilitate information dissemination across the organization and beyond its boundaries in a secure, trusted, and reliable format.

- **Meeting and Conferencing** – Another critical set of tools that facilitate the functioning of virtual teams are virtual meeting and conferencing tools. Since the teams seldom will have had any face-to-face interactions, they must be able to setup meetings virtually. The meeting and conferencing tools should have capabilities beyond just voice transmission. They need to be able to transmit video and should have features for document and screen sharing as well. A face-to-face interaction can be substituted by a video conferencing call. WebEx from Cisco is a good example.
- **Enterprise Messaging Systems** – Enterprise instant messaging systems allow a quick communication between two or more members of the team. These are quicker and more economical than a communicate over traditional voice technologies. Most Enterprise instant messaging applications also allow voice over Internet protocol (VOIP) functionality for voice chats.
- **Enterprise Portals and Blogs** – Blogs and portals are quick ways of publishing information to a wide and a physically spread out audience. Since they do not require any code and most of them have out of the box setup and configurations, they are both cost and resource effective. Discussion boards and forums should be part of this system to encourage an interactive participation.

**Techniques** – The techniques on the other hand are less tangible than the tools. They are application of knowledge, tools and procedures that enable achieve maximum efficiency from virtual teams.

- **Competencies and Skill** – As with any other team the structure of the virtual team should factor in competency and skills that are required to accomplish the project. Competencies and skill should be balanced to ensure that there is no polarization.
• **Feedback** – Since the team seldom meets face to face, there is a possibility that some of the team members become passive with respect to feedback. As a project manager working with virtual teams it is important to encourage and provide timely feedback. Feedback also helps uncover hidden risks and opportunities of improvement. Feedback should always have a follow-up action plan associated with it.

• **Roles and Responsibility clarification** – Lack of clarity in roles and responsibilities can creep up very quickly in a virtual team environment. Establishing ownership and accountability is critical to avoid conflict and ensure the team’s effectiveness. Implementing a project responsibility assignment matrix and publishing it can help mitigate this risk.

• **Multicultural Sensitivity** – Virtual teams are usually spread across geographies. Team members may come from diverse social and cultural backgrounds. In such cases it is helpful to understand these uniqueness and values beforehand and make the teams aware to avoid potential disasters. Casual socialization meetings like during a project kick-off are excellent times to initiate such awareness.

**Success Factors**

Beyond tools and techniques there are some critical success factors that determine the effectiveness of virtual teams

• **Technology and Infrastructure** – Apart from the strong business justification that drives the implementation of virtual teams, it is the technical infrastructure that is a key enabler. Without this rapid growth and general availability of technology, the implementation virtual teams would have been limited to large organizations only. The infrastructure availability including network technology drive the success of implementing and working with virtual teams.

• **Security** – Information and data security is the next most critical factor that effects virtual teams. Teams exchange a lot data and information between them. Security measures, standards, processes including audits must be in place to ensure the security of the information that is exchanged. Protecting an organization’s intellectual property against security threats and data loss is vital.

• **Management and Leadership Support** - The mere implementation of virtual teams might not be enough or effective unless there is a strong management and leadership support for this. The executive team, Project steering committee or the project leadership team, must walk that extra mile to support and help the extended teams and stakeholders understand the justifications and benefits of implementing virtual teams. They must address any concerns arising due the implementation of virtual teams

• **Project Management** – Last but not the least, the ability of the project manager to lead and influence a team that he or she might not have met personally is critical. Hence having a seasoned and a experienced project manager is a critical success factor. As a
project manager who is working with virtual teams he or she needs to be proactive and be able to build the relationship.

Tools and techniques are great, but knowing when and how to apply them effectively makes the difference. Every project or a program is unique and hence there is no one fixed method of applying the tools and techniques discussed above.