

When Size Matters, Team Up by Elaine Crowley

“We liked your proposal, but decided to go with a larger firm.” Ouch. Choosing to keep your consulting operation small and flexible is a disadvantage when clients seek the security and diverse skills offered by larger competitors. Pursue these opportunities by creating a virtual consulting firm that will add the volume you need to attract and maintain the clients for whom size really does matter.

Find your teammates by hunting or farming. When a project arises unexpectedly, hunting may be your only option. Use your existing network, asking the headhunter’s classic question: “Do you know anyone who does ...” You may uncover people quickly, but have little time to get to know if their skills and operating style match your needs. Your choices are also limited to who is available at that time.

Farming increases your choices and the likelihood of making a good alliance. Always be on the lookout for potential teammates. When you meet likely people, follow up. Invite them for coffee or lunch. Set up another meeting if the first goes well, and perhaps a third. Be sure you are compatible before exploring if they would be willing to join your virtual team.

Look beyond financial or actuarial skills. Are they comfortable using technology? Are they willing and able to communicate well and often? Communication is the most important factor in making a virtual team successful, so ask them to describe experiences that involved frequent and complex communication. If you sense resistance to working this way, move on.

Stay in touch with viable candidates so you can build a relationship or understanding and trust before you take on a project together. You also gain a thought-partner for prospecting and business development, as well as project delivery.

Define your consulting relationship. Do you create a temporary joint entity, with its own name? Are your teammates your subcontractors? How will the marketing and sale of the project be compensated? What resources and services does each teammate contribute? How will you handle contingencies? Capture all these issues in a written contract, drafted by your attorney.

Invest in building your team. The Center for Creative Leadership’s studies show that those who don’t build their teams at the start need to go back and do so six months later. Virtual consulting networks provide special challenges. In addition to assuring that everyone understands and commits to a common purpose and recognizes interdependencies, you have the heightened effects of logistics, competing priorities, cultural differences and human nature.

Informal communication, an effective team’s most powerful tool, is harder to achieve. How will team members get their information? How can you create a “virtual coffee pot?” Virtual teams suffer more communication breakdowns than others. Conflicts go unidentified and so take longer to resolve, especially if relying on non-visual media like e-mail and phones.

Scheduling meetings can be complicated by infrastructure, time zones and communicating in nonnative languages. Other matters come into play such as who comes in early for a meeting or stays late? How do these decisions affect team identity, commitment and cohesiveness?

Virtual teams magnify the human factor. Distance reduces collaboration, so trust builds more slowly while the need for working interdependently may be high. Clarity about roles and responsibilities decays over time. Team members may struggle to balance the team and other commitments.

Best Practices Make the Difference

1. *Pay special attention to the basics at the start.*

Assess the goals and expectations of team members. Can't bring team members together? The team leader should meet personally with all members to resolve stalemates and conflicts, create alignment on the mission, goals and individual roles and responsibilities, and make decisions such as who, when and how much. Write it all down. Review the stages of team development - forming, storming, norming and performing - so everyone will know what to expect.

2. *Build trust and manage conflict.*

Discuss how the team will build trust among members. Videoconference if you can. Devote 20 percent of each meeting to socializing. Use face-to-face meetings strategically. Cross-training members at other sites can produce influential goodwill ambassadors.

3. *Discuss cultural differences.*

Increase understanding and avoid stereotypes. Speak slowly and avoid jargon. Some cultures rely more heavily on nonverbal communication; others rely more on language. Choose your team's technology accordingly. Tolerate side conversations; there may be a translation going on. Remember, culture shock is something we experience *and* inflict.

4. *Co-create the team's specific culture and find "third ways."*

Define how the team will work together, rather than defaulting to "the way we do it here is..." Reinforce that there is *one team*, not a Boston team and a Delhi team.

5. *Ensure teams have and know how to use the best technology.*

Can all members use and troubleshoot the technology (e-mail, video conferencing, etc.)? Use Internet chat and thread rooms to enable informal communication. Negotiate rules for using technology. For example, e-mail is a poor way to settle an argument, so switch to phone conversations when things get heated.

6. *Redesign work processes for a virtual environment.*

Make project plans and work processes visible everywhere (flow charts, process maps, and nonverbal cues). Share information and power. Negotiate the timing of meetings and share the burden of accommodation.

7. *Manage by milestones.*
Emphasize deliverables, not activities. Encourage local decision-making and work methods. Agree that everyone will give early warning of difficulties, and hold the whole team accountable for solving them. Outlaw blaming and finger-pointing.
8. *Practice leadership.*
Due to less frequent and less informal contact, the leader has greater impact during interactions. Manage communication accordingly. Take responsibility for reinforcing the basic messages about the team whenever people join or leave.
9. *Learn as you go.*
Hold a postmortem after completing each milestone. Produce a “statement of learning” at the end of a project and/or before the team disbands.
10. *Keep your sense of humor!*

Virtual teams are more difficult to manage successfully than traditional, collocated teams. They require greater amounts of skilled attention to leadership, communication, project management and adaptability. If you make the investment, you will see significant rewards.

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