A MANAGER'S BEST PRACTICES TO COORDINATE GLOBALLY DISTRIBUTED TEAMS

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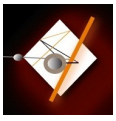
The Modern Workplace

Every morning, Lucia (all names used in this industry perspective are pseudonyms) stops by the Adolfo café in downtown Montevideo to get a small latte to go. She gets to the office and logs onto Lync, her client's choice of instant messenger. Her office is quiet this early in the morning because her officemates are not yet in, but Lucia's colleagues on her project are already hard at work. They just happen to be in a different time zone. In fact, they're in a different country. Lucia tries to align her schedule as much as possible with that of her team located in Chicago, and that means being online a few hours prior to her usual office hours in Uruguay.

Lucia works for an international consulting firm where she is a quality assurance analyst for software, websites, and mobile apps. Her fluency in English allows her to work with a multitude of English-speaking firms, such as the one in Chicago. Lucia's situation is not unique. It is estimated that approximately 29% of the global workforce in 2013 was considered to be anytime, anywhere information workers (Schadler, 2013). An array of mobile devices—smart phones, tablets, and laptops—enables employees to be connected at all times. Software such as



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WebEx, Skype, and GoToMeeting has replaced face-to-face meetings and the need to be located in the same time zone, much less the same physical office space. All this access translates to teams who are able to work and collaborate remotely.

Although this plethora of connectivity, devices, and tools promises to make working on international teams seamless, managers of such teams face other challenges. The typical workforce is no longer homogenous in terms of cultural background, language, and customs. While corporate culture certainly exists in many companies, it may not translate across teams who are located in different offices, cities, and countries (Adler & Gundersen, 2008).

In many cases, such as Lucia's, her teammates are not even in the same company. Although her manager in Montevideo may be sitting a few cubicles away from her, Lucia's success depends on her client; and she gets her direction from the development manager in Chicago. And that manager may be responsible for team members across various offices and countries in addition to Lucia in Uruguay. What can managers working with globally distributed teams do to ensure success for their teams?

In this article, we present the results of interviews we did with a number of global workers; the purpose of these interviews was to determine what might be steps managers can take to facilitate effective communication in globally distributed virtual teams. In addition to the Uruguay-based quality assurance analyst Lucia, we interviewed a number of other individuals who regularly work as a part of globally distributed teams. These individuals are an Israel-based engineer working for a Chicago-based software company and several U.S.-based user experience designers from the financial services industry and the electronics industry.

Methods

Our interviewees were chosen for their experience working in globally distributed teams. Lucia, who works for an agency in Uruguay, mainly supports a team based in Chicago, Illinois. Bill and Tara, U.S.-based interaction designers, frequently

work with teams located in international corporate offices. And lastly, Anna, an American software engineer who moved to Israel, telecommutes in her work with an otherwise U.S.-based team.

The interviews focused on how these industry practitioners communicate and collaborate with virtual team members. In conducting the interviews this way, we examined the technologies they use, the challenges they encounter, the success they have, and their suggestions to management on how to prepare employees for collaborating with globally distributed team members. (See the appendix for interview questions.)

Interviewees provided written feedback to the interview questions. Because all interviewees are fluent in reading and writing in the English language, the questions were provided in English; all of them also chose to provide their feedback in English. These professionals' advice intersects as five practices, which we explain in greater detail.

Practice 1: Form Relationship Action Plan

Our interviewees suggest that when a new team forms and a new project starts, managers need to help team members get to know each other, reach consensus about the team's goals and milestones, and understand each team member's responsibilities. These tasks should be addressed at a kickoff meeting before the onset of the project. This initial "face time," as Lepsinger and DeRosa (2010) write, is crucial for building trust among team members from the get-go, before any negative sentiments or behaviors occur.

If meeting and interacting on site is simply not possible, our interviewees suggest having someone experienced with the project virtually sharing their knowledge with remote team members to fill them in on project details. Such knowledge sharing can take the form of writing up best practices and placing them on a wiki or holding a teleconference. At the same time, managers should strive to create social space online to build interpersonal relationships. Settle-Murphy (n.d.) suggests dedicating an hour to hold a virtual kickoff meeting for members to talk about their background, family, interests, etc. for team bonding.

But what if it's an ongoing project? When a new team member is inserted into a project midstream, how does one know whom to ask what question and when? In order to get new members off to a good start, Ritesh Idnani, CEO of Seamless Health, gives every new executive two weeks to interview people who are "important to know" about all aspects of the company and the job (Ferrazzi , 2014).

This exercise can also benefit individual contributors to a team, particularly those who will be working with colleagues they will never actually meet face to face. Almost every interviewee, when relating their experience of working on a globally distributed team, commented on the cultural differences that cause unexpected issues. As Lucia (personal communication, 11/14/2013) says, "Cultural differences are an obvious challenge when working with international teams. Usually nobody tells you how the culture is, you have to learn on your own." Meeting new colleagues over the phone or even Skype one-on-one for a brief introductory session as part of an onboarding process can help alert team members of cultural homework they may need to do (e.g., noting cultural differences in and researching the etiquette for communication). It can also help alleviate the pressure of learning the culture in the moment.

Each new member should also be given the opportunity to learn and gather knowledge about people's roles and responsibilities prior to the need arising under a deadline. Reporting what they have learned at the end of the two-week period to their manager would provide new members an unofficial deadline to this assignment and help them share with their manager what they have learned as well as address any outstanding questions that they still may have.

Practice 2: Establish Communication Cadence

For Bill (personal communication, 11/14/12), a user experience designer in the financial services industry, one of the challenges working with remote stakeholders was all the time spent planning design sessions. These sessions are meant for collaboratively establishing a design approach for a new initiative. Delaying these meetings held up important decisions. "I wish I'd known more

about the amount of lead time that is needed in planning design sessions with stakeholders in other locations," says Bill. "Planning weekly or even daily meetings at the start of a project goes a long way toward making sure you have time set for regular communications."

As a project gets rolling, issues and questions inevitably arise. If the team is located in the same place, it's fairly simple to walk over to someone's desk and get an immediate answer. It's also possible to have impromptu meetings and, in Bill's case, ad hoc design sessions. However, within a global team, prompt responses may mean a day's delay and it's virtually impossible to have an ad hoc meeting with more than two people involved.

A manager can help prevent such uncertainties by setting expectations about the right amount of status meetings at the right time and by making such factors clear at the beginning of each project. Although independent information seeking or problem solving via instant messenger, email, and phone calls is still possible (despite the time differences), it can be very useful to get everyone in a meeting together to provide updates and voice roadblocks before they impact the project and workflow.

These meetings should not be considered as mere opportunities to solve problems and therefore only scheduled when problems arise. Rather, they should be thought of as opportunities to share knowledge. Research suggests that virtual teams, more so than local teams, find it important and beneficial to share knowledge (Lin, 2011). Knowledge sharing in virtual teams also enhances team members' team commitment, and both factors ultimately will enhance job effectiveness (Lin, 2011). To enhance knowledge sharing, teams can have a daily short status meeting if they are in time zones that overlap or weekly meetings if that makes more sense to the project team. Whichever cadence is chosen, the manager should set the expectation early on to get everyone on the same page. According to Lapsinger and DeRosa (2010), this should be one essential task to assess and determine during the project kickoff meeting.

Practice 3: Establish Tools for Asynchronous Communication

Synchronous communication such as VoIP and teleconferencing are commonly used by virtual teams. These communications can disseminate urgent messages (Brown, Huettner, & James-Tanny, 2006) and are useful for simultaneously focusing team members' attention to make decisions or reach agreement (de Almeida & Duranti, 2012).

At the same time, if people are not in the same time zone and have different work schedules, team members often will not be able to have real-time communication to get immediate answers to questions or provide updates on a regular basis. In these cases, asynchronous communication becomes important. Asynchronous communication can be as simple as using an online tool that securely archives documents and discussion threads. This process allows team members to access saved information at their leisure and to take time to compose or process information (de Almeida & Duranti, 2012). As such, it is more effective for task-focused activities such as sharing code and design (Serçe, Swigger, Alpaslan, Brazile, Dafoulas, & Lopez, 2011, p. 500) and may be particularly appreciated by members who are not communicating in their primary language (de Almeida & Duranti, 2012).

When selecting asynchronous tools, one should consider tools that are able to present complex verbal and visual information and support collaborative authoring and editing. The tools chosen should include features such as the ability to:

- Construct discussion threads.
- Search archived information.
- Upload documents in various formats.
- Ideally, allow real-time collaboration.

There are many such tools available at low and, sometimes, no cost, for example, forums and bulletin boards, wikis, intranet, FTP, and various file-sharing software

(Brown et al., 2006). Some of these tools are also capable of tracking revisions, which makes collaborative authoring easier. Wikis, for instance, maintain revision histories so documents can be restored to a previous version if needed (Brown et al., 2006). Likewise, both paid and open-source software (e.g., SVN or Git) are available and allow version control in document sharing and collaborative editing. Team members will frequently discover their own tools and try to explore or experiment with these tools on their own. As a manager, however, it would help to establish and encourage a common set of tools to ensure that all members have access to the software and hardware and can access the work being done (for reference even if they are not directly involved).

Once the tools are chosen, do not assume that they will continue to work; or, if the company already has its common set of tools, do not assume that they necessarily work or work for all involved. Instead, a manager should periodically check in with team members and be open to experimentation. Tara (personal communication, 11/12/13), a designer for an electronics distributor, learned that email and WebEx are not necessarily the most efficient way to communicate. But using a tool like Conceptboard allowed her greater flexibility. Conceptboard is an online tool that allowed Tara and her team to sketch out designs and share them with remote members across multiple continents and time zones. It also allowed them to save the concepts with annotations to refer to later, so that colleagues didn't have to be participating in real time. As Tara says, "I assumed we'd have robust communication in place given that we regularly work with colleagues in Singapore but there wasn't one. I'm glad I suggested Conceptboard. It's been really helpful."

Practice 4: Learn to Empathize

Managers often wear many hats. Being attuned to their team's performance health is certainly one of the important tasks. Being mindful and listening to team members along the way is important to staying ahead of any issues that may be arising and to having ample time to correct the course. Being mindful is challenging even when everyone is in the same location. How does one attain this

receptive stance when team members are not sitting together or meeting face to face? Body language is lost in emails and instant messages, tones can be fuzzy to discern in web meetings, and language barriers and unparalleled cultural norms compound how one may interpret team members' reactions. Though these are challenges that one cannot avoid when working with globally distributed teams, our findings suggest that being empathetic to cultural differences can help managers cope with them.

Empathy is the ability to manage someone with his or her own unique point of view in mind, an ability that is positively related to managers' job performance (Gentry, Weber, & Sadri, 2010). In virtual teams, team members' points of view will frequently be seen through a cultural lens to which a manager may not always be immediately privy. Broadly defined, a cultural lens may include many different perceptions regarding workflow and habits, organizational hierarchy, and norms of interaction. Therefore, it's important to understand cultural nuances and, instead of seeing them as communication limitations, leverage them to relate better to each team member and foster collaboration across all team members. In Gentry et al.'s (2010) words, an empathetic manager in today's workplace is someone who is able to "cross organizational and cultural boundaries" and "create shared direction, alignment and commitment between social groups with very different histories, perspectives, values, and cultures" (p. 3).

Interviewees noted that a manager should have one-on-one meetings with each team member on a regular basis and listen to his or her issues. It is important to encourage team members to voice concerns when they seem reluctant to do so. Remember that not all team members necessarily share the same cultural assumption or company culture that encourages them to feel free reporting problems without feeling it is their own fault for allowing the problems to arise in the first place. For this reason, it may be helpful to set up an anonymous system through which team members can submit their concerns if they are reluctant to come forward to the manager directly. Managers can also periodically survey their team, anonymously if need be, to gauge whether the globally distributed members are running into any issues and if the tools they are using are functioning as intended.

Anna (personal communication, 11/12/13), an Israel-based software engineer working with a U.S.-based firm, had once felt disconnected with her team members and found that she was consistently playing catchup on her projects. After much hesitation, she approached her manager. Her manager listened to her concerns and, understanding her unique situation, including time difference, connected her with other remote employees who helped her understand some of their techniques and resources that she was able to apply to her own practices with success. "I wasn't sure I can share these challenges I was having at the time with my manager, but in retrospect, I should have done it sooner," says Anna.

Being empathetic alone, as Earley and Peterson (2004) say, is not enough. Managers need metacognitive skills of understanding and learning culture (Earley & Peterson, 2004). This skill is not merely about having specific cultural knowledge or examples. Rather, with globally distributed and multicultural teams, it is more important for managers to have the ability to incorporate new cultural information, to inductively understand new cultural situations, and to continuously reflect upon their own cultural knowledge (Earley & Peterson, 2004, pp. 106-107). If a manager lacks personal experience with virtual teams, a particular method to develop these metacognitive skills is to turn the tables around and learn from team members who have been successful in global projects in the past. Leading by example, successful managers know to encourage experienced colleagues to share those experiences, possibly with the entire project team.

Practice 5: Share Leadership

When managers consciously and continuously practice empathy and learning, they can start to foster a style of shared leadership—whether they or their companies name it as such. Shared leadership is found to be particularly relevant for managing dispersed teams. According to Muethel and Hoegl (2010), in virtual teams, team members reside at different locations and have different information bases, so they are each uniquely positioned to identify issues and changes as well

as initiate actions. Moreover, Muethel and Hoegl find that, if encouraged by the management, each team member will not only monitor his or her own tasks and contribution but that of other team members, urging them to take actions that they otherwise may not.

Shared leadership is also especially relevant for teams in the technology industry who practice the Agile development methodology, which is an iterative and lightweight approach to software development (VersionOne, 2014). Within the Agile development methodology, each project team is dedicated to one product and functions as a self-organizing and self-managing entity. Team members collectively divide the product features into smaller chunks, determine deadlines for each feature, and use continuous coding-testing-release to incrementally refine the product (VersionOne, 2014). The goal is to go through the development life cycle in small, iterative steps and release software updates and new features faster.

Within the Agile methodology, managers play the role of facilitators, especially in a globally distributed team. Although the team determines its own cadence for delivery, a manager can identify any issues arising and ensure the team's success by sharing leadership and relying on each team member to take action and accountability.

Conclusion

Regardless of everyone's cultural background and work style, chances are they share one thing in common: they want to succeed and do their job well. In this article, we interviewed several distributed global workers and proposed several best practices for their managers. These practices include forming a relationship action plan, establishing communication cadence, identifying communication tools, and being an empathetic facilitator who shares leadership. By following such practices, managers can help ensure the success of their globally distributed teams. ■

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Appendix

Interview Questions

1. Briefly describe your role: what industry are you in, what are your main work responsibilities, and what are some of your daily tasks?
2. How much do you correspond with people who are located in different parts of the world? Who are they and where are they located?
3. What's the nature of your correspondence and work with these globally distributed teams: E.g., what media do you use to communicate (email, Skype, teleconference, or something else still)? What do you communicate about? And how frequently do you communicate?
4. What are some of the challenges you face in communicating and working with globally distributed teams? Are these challenges caused by technology, time differences, cultural differences, or anything else still? Do you have a bad experience to share?
5. On the other hand, what are some things that work well for you in communicating and working with globally distributed teams? What do

you believe are the reasons for these successes? Do you have a success story to tell?

6. What is the one thing you wish you had known when you first started working with globally distributed teams that you know now?
7. What do you think companies like yours can do to better prepare employees for working with globally distributed teams?

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